



Social Intelligence Report

ADOBE DIGITAL INDEX | Q1 2014

Key insights

Paid Social

- Facebook ad CTR is up 160% year-over-year and 20% quarter-over-quarter.
- Facebook ad CPC is down 2% year-over-year and down 11% quarter-over-quarter.
- Facebook ad impressions are up 40% year-over-year and 41% quarter-over-quarter.

Organic Social

- ¼ of videos played on Facebook occur on Fridays.
- 15.7% of Facebook post impressions happen on Fridays.

Owned Social

- LinkedIn refers the second highest amount of social traffic to B2B High Tech sites.
- Revenue per visit (RPV) from Tumblr is up 55% year-over-year but down 36% quarter-over-quarter.



Social media gets more engaging with age.

Social buzz, ads, and content can all be used as a way to reach and monitor individual consumers. Facebook continues to dominate the social realm, but each social site has a unique audience and route that can lead to more loyal fans, brand awareness, and eventual revenue.

Table of contents

Paid Social

- 01** Facebook ad CPCs and CTRs in U.S.
- 02** Global Facebook ad click volume and impressions growth

Organic Social

- 03** Engagement type
- 04** Share of post type
- 05** Video plays
- 06** Impressions, rates, and plays by day of the week
- 07** Engagement type by day of week
- 08** Super Bowl and Oscar social buzz leaders

Owned Social

- 09** Social media referrals
- 10** Share of total social referral visits by industry
- 11** Share of social referred visits
- 12** Methodology
- 13** Appendix
- 14** Glossary
- 15** Recommendations



Facebook ad CPCs and CTRs in U.S.

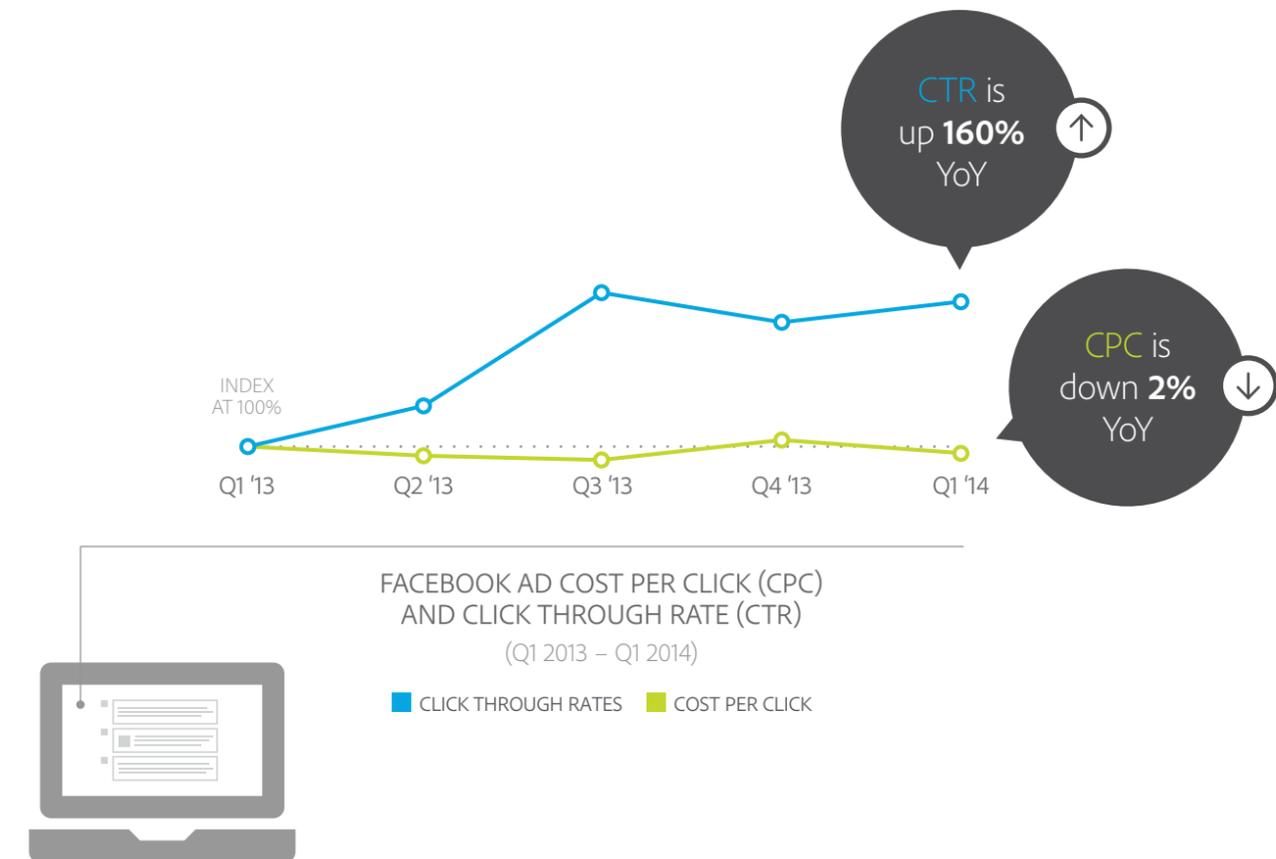
Click-through rates (CTR) continue to rise for Facebook ads, while their costs per click (CPC) have lowered considerably since the holidays.

The findings:

- Facebook ad CPC is down 2% year-over-year and down 11% quarter-over-quarter.
- Facebook ad CTR is up 160% year-over-year and 20% quarter-over-quarter.

The opportunity:

After an expensive holiday season, CPCs are back down. While costs are low and CTRs continue to grow, brands should stick with Facebook ads as they continue to incorporate more mobile specific ad serving and targeting.



Global Facebook ad click volume and impressions growth

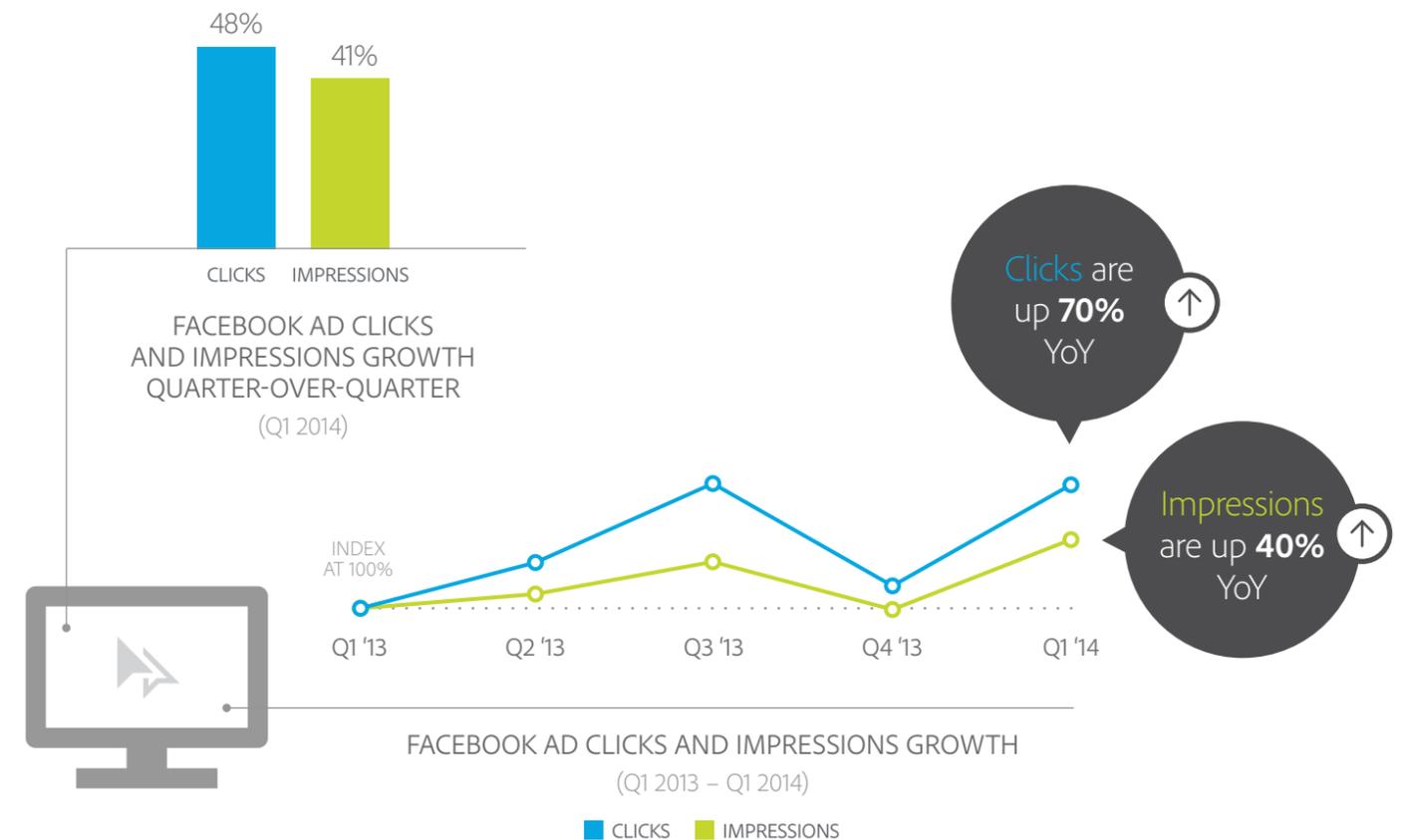
Facebook ad clicks and impressions are both up, with clicks again outpacing impressions.

The findings:

- Facebook ad clicks are up 70% year-over-year and 48% quarter-over-quarter.
- Facebook ad impressions are up 40% year-over-year and 41% quarter-over-quarter.

The opportunity:

More impressions mean more competition. As marketers expand Facebook offerings, look for ways to implement more targeted ads where there is more open space to capitalize on an engaged audience.



Engagement type

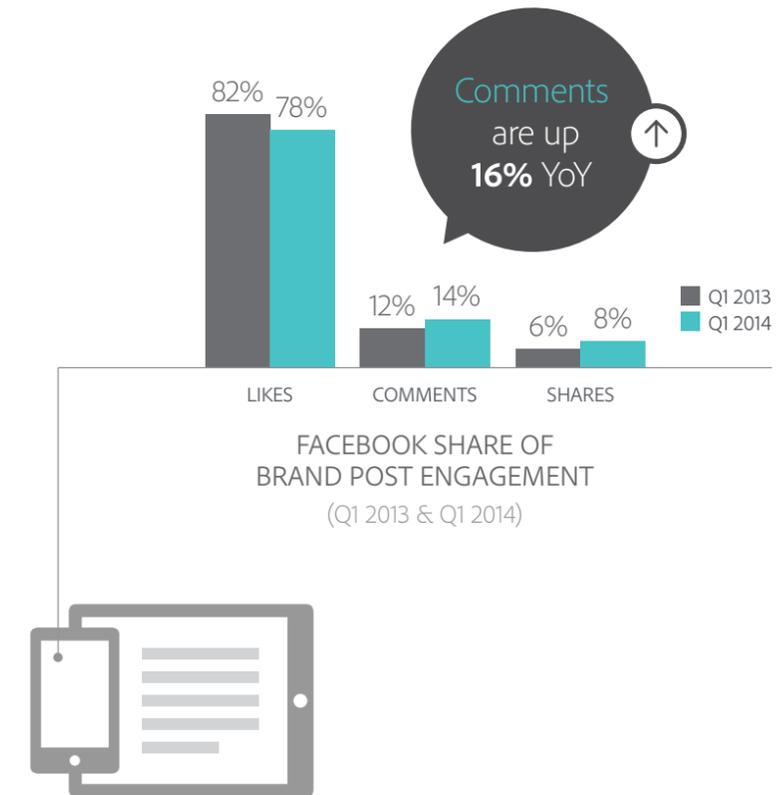
Comments and shares are becoming a larger portion of social engagement, which shows that brands are getting better at engaging fans.

The findings:

- Comments share of post engagement is up 16% year-over-year and 40% quarter-over-quarter.

The opportunity:

Marketers should keep adapting and finding new ways to ensure fans see content, either through paid postings or linking to Facebook Pages from other properties.



Share of post type

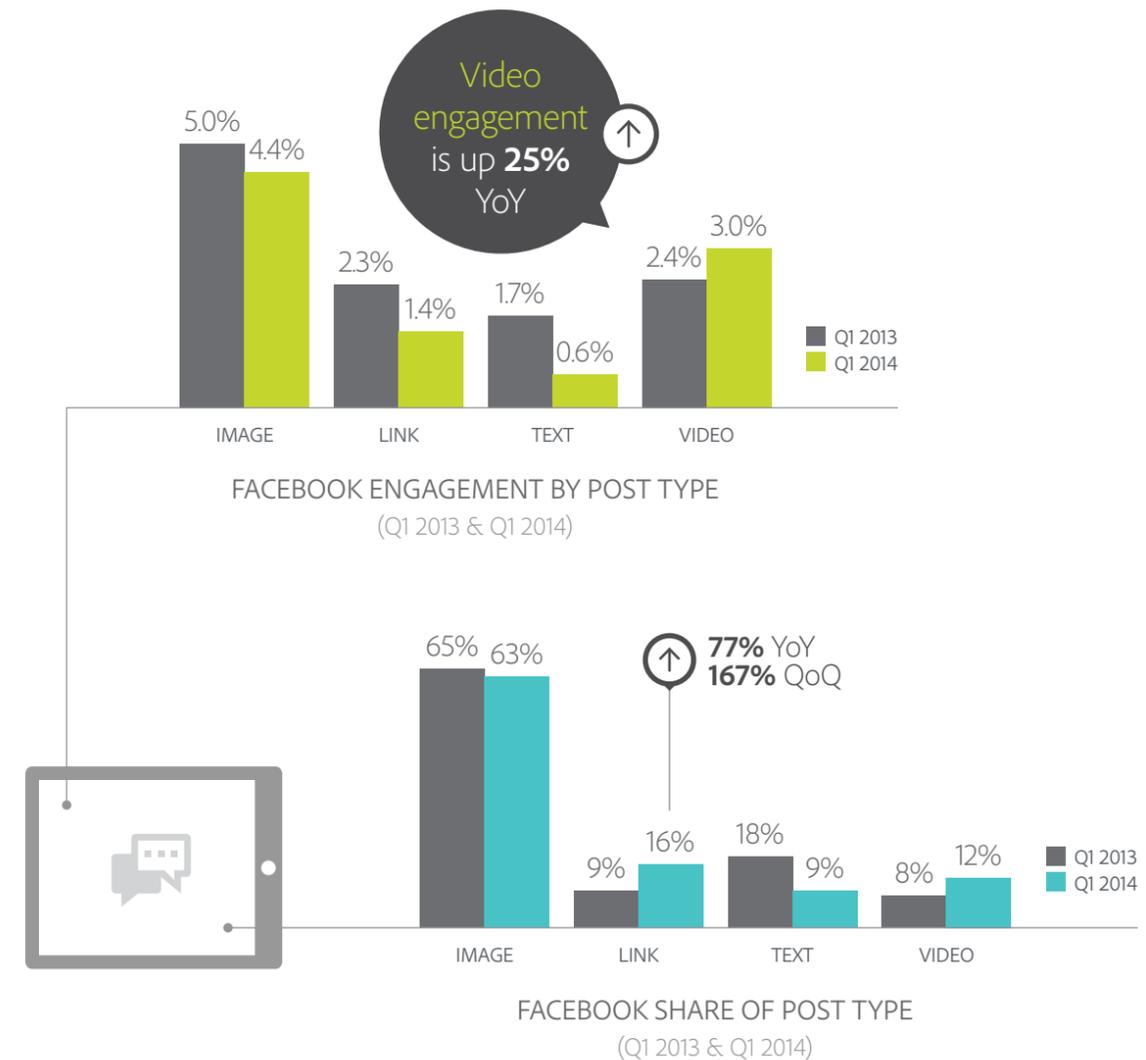
Marketers are looking to drive more people to their sites as posts with links have increased substantially in Q1. Video posts have also increased.

The findings:

- Engagement with video posts is up 25% year-over-year and 58% quarter-over-quarter.
- Posts with images provide the highest engagement rate.
- Text posts have declined quickly in share and engagement.
- Posts with links are up 77% year-over-year and 167% quarter-over-quarter.

The opportunity:

Links and video both showed strong growth as marketers continue to wage the social battle between engagement and referral traffic. With video engagement up, marketers should consider more video posts. Fridays are a good bet.



ORGANIC SOCIAL

Video plays

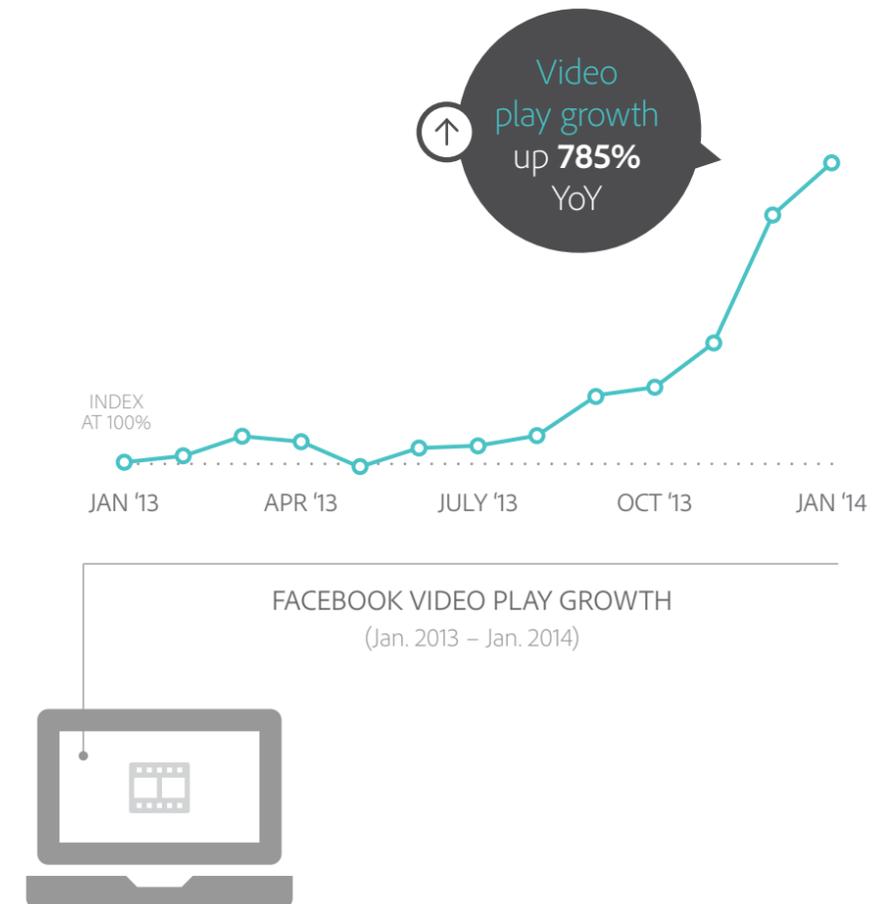
Recent Facebook changes have increased the amount of videos being watched.

The findings:

- Video plays are up 785% year-over-year and 134% quarter-over-quarter after auto-play videos were implemented in Q4.

The opportunity:

Marketers must keep an eye on Facebook algorithm changes and quickly adapt strategies to optimize value and reach of paid and organic posts.



ORGANIC SOCIAL

Impressions, rates, and plays by day of the week

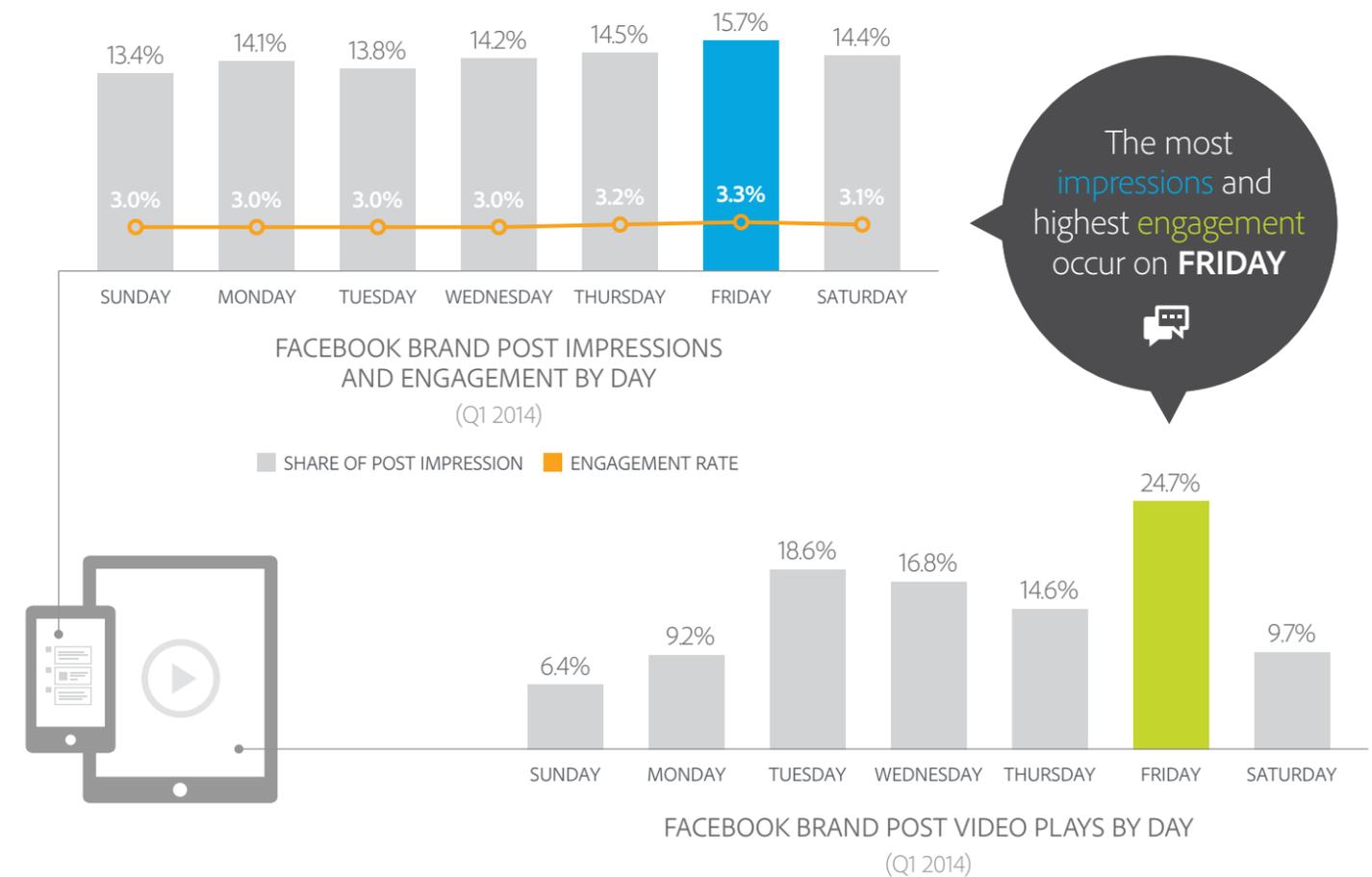
Brands are targeting Facebook users on Fridays and users are responding with better engagement rates and video plays.

The findings:

- Most impressions in Q1 came on a Friday, with 15.7% of all impressions.
- The highest engagement rate with posts occurs on Fridays.
- Nearly ¼ of all video plays on Facebook occur on Fridays.

The opportunity:

Knowing your audience and when they are engaging will help you to better create a successful long term social strategy.



Social engagement type by day

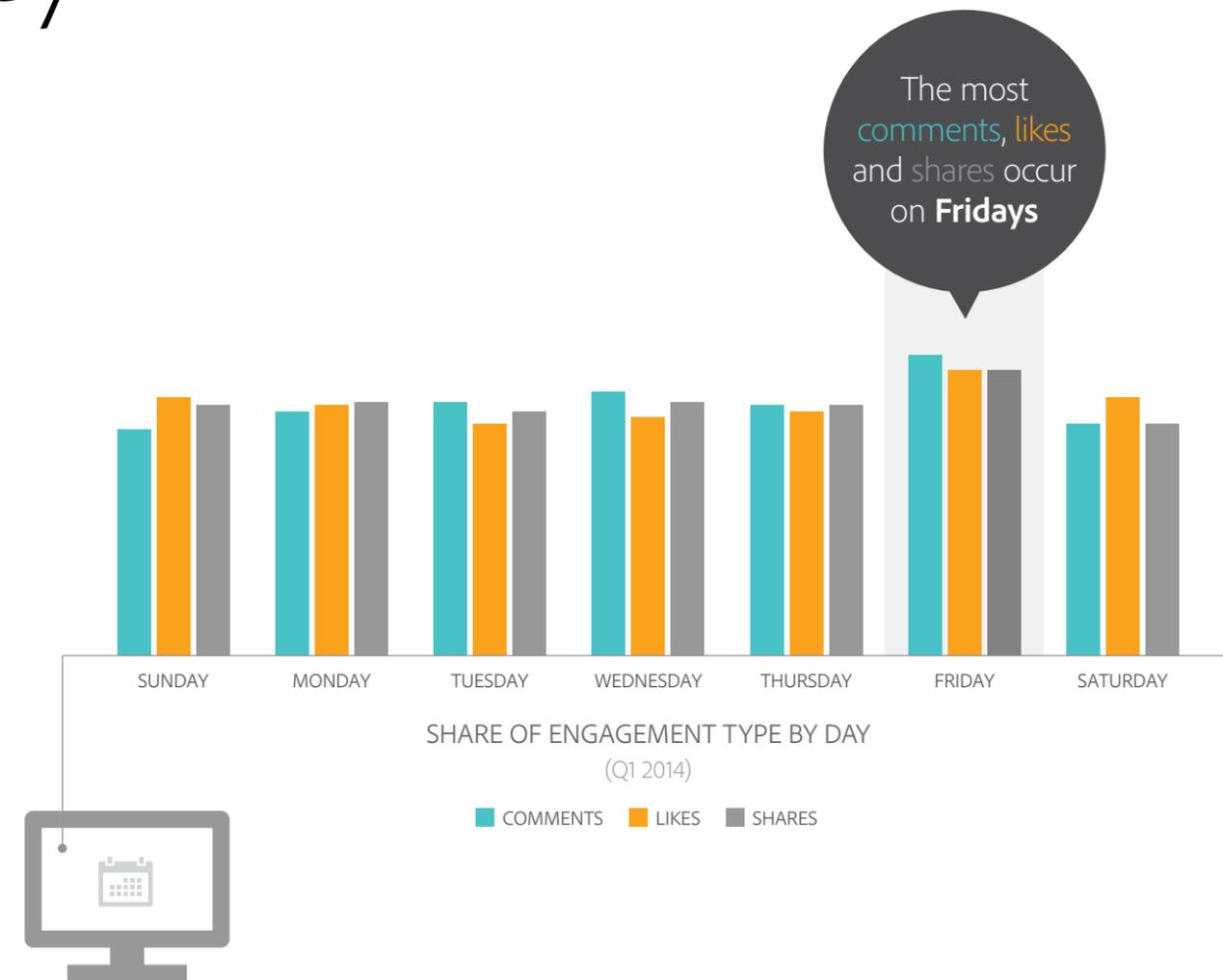
Consumers are commenting, sharing, and liking posts the most on Fridays.

The findings:

- 17% of comments occur on Fridays.
- 16% of likes occur on Fridays.
- 16% of shares occur on Fridays.
- Sunday is the least likely day to receive a comment on a post.

The opportunity:

Weekends are the best time to get engagement from consumers. Look to schedule posts for release throughout Fridays and Saturdays.



Super Bowl and Oscar social buzz leaders

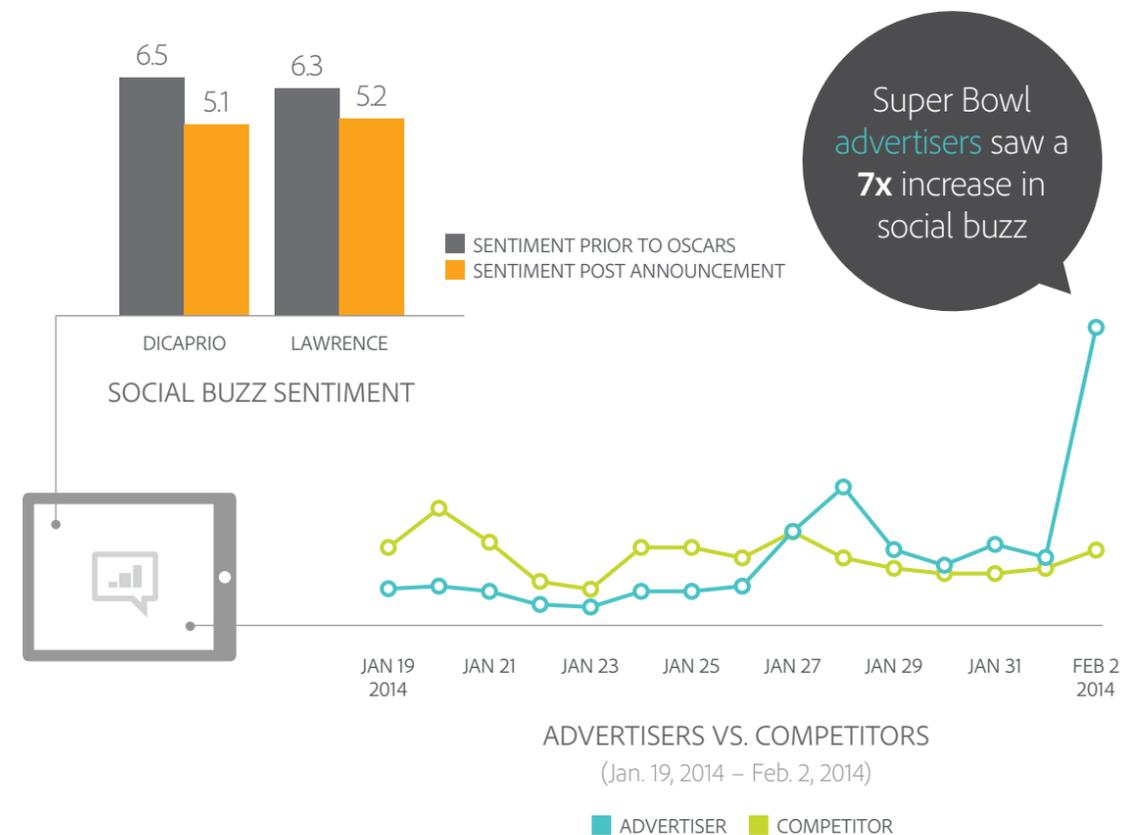
Advertisers for the Super Bowl saw a large increase in buzz leading up to and during the game, while fans snubbed the Oscars after two celebrity favorites lost out.

The findings:

- Super Bowl advertisers saw a 7x increase in social buzz compared to their top competitors.
- Radio Shack had the largest boost with a 22x increase in social buzz over its 30-day average.
- Fans of Leonardo DiCaprio and Jennifer Lawrence showed displeasure for their Oscar snub. Sentiment of social buzz after the announcement dropped more than 15% for each.

The opportunity:

Social buzz tracking can provide a great way for marketers to have an ear to the ground on everything that is being said about a company, product, competitor, or any number of things that can warrant an immediate response from a brand.



Revenue per visit by referrer

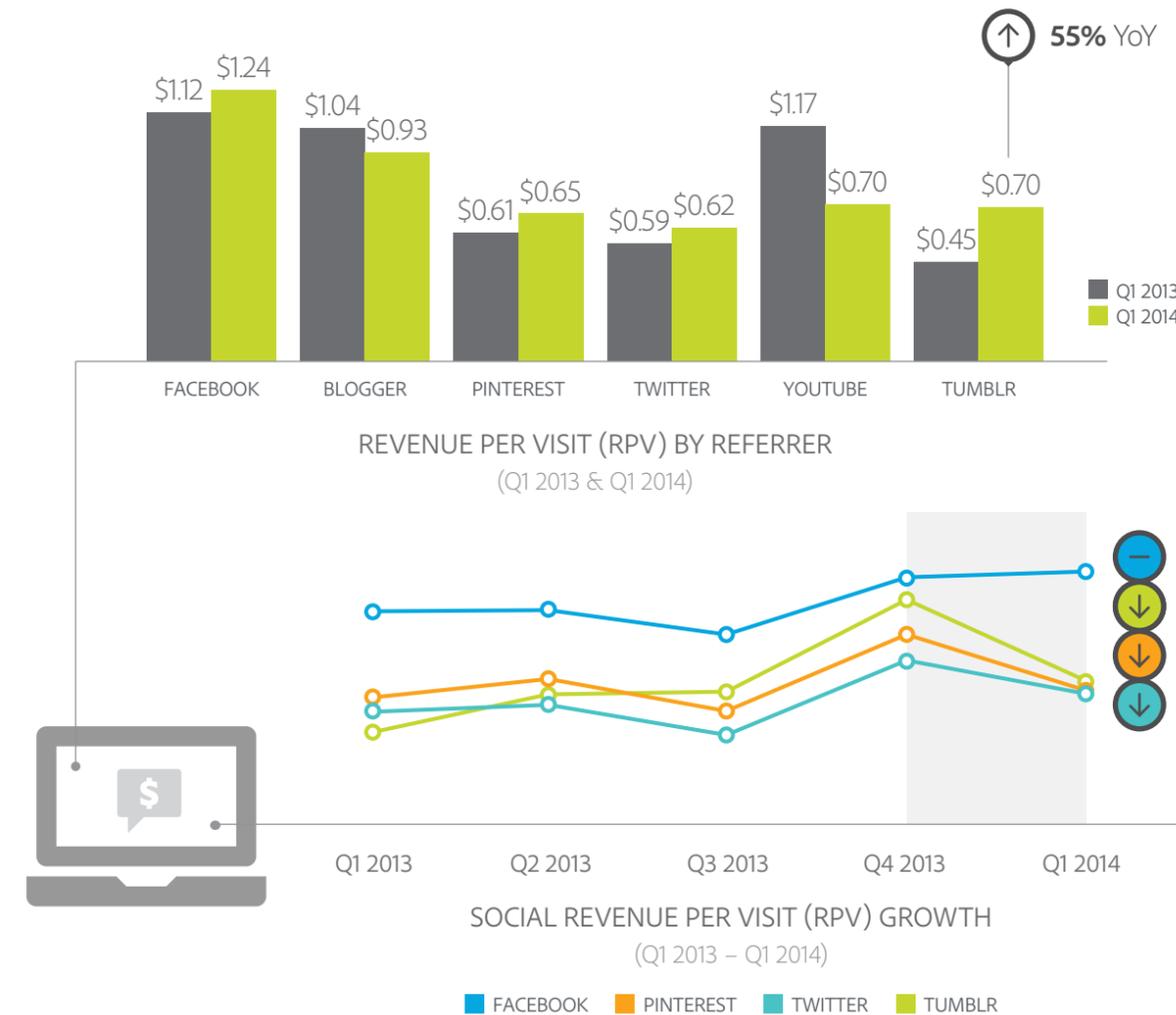
Revenue referred from most social channels to Retail sites dropped quarter-over-quarter, except for Facebook.

The findings:

- Facebook referred revenue per visit is up 11% year-over-year and 2% quarter-over-quarter.
- Twitter referred revenue per visit is up 5% year-over-year and down 23% quarter-over-quarter.
- Tumblr referred revenue per visit is up 55% year-over-year, but down 36% quarter-over-quarter.

The opportunity:

While Pinterest and Tumblr are doing better than last year, they're still unable to provide consistent referred revenue outside of the holiday shopping season. Facebook, however, continues to provide value year round.



OWNED SOCIAL

Share of total social referral visits by industry

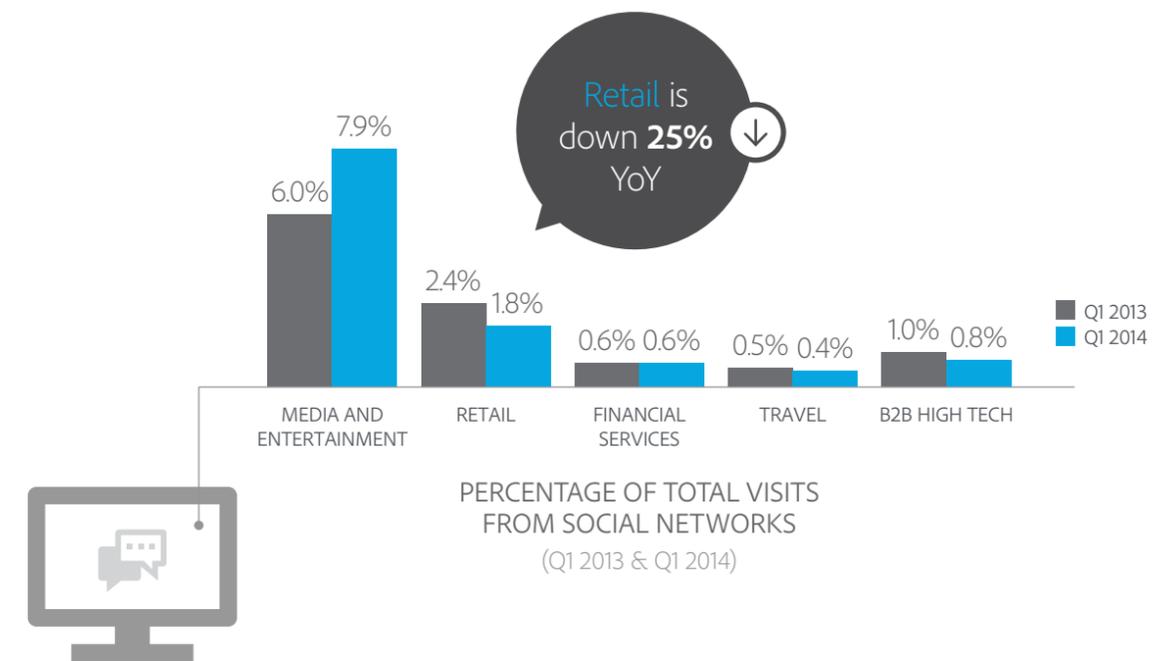
Social refers the most consumers to Media and Entertainment sites and the second most to Retail sites.

The findings:

- 7.9% of traffic to Media and Entertainment sites is from social networks.
- Social-referred traffic to Retail sites is down 25% year-over-year.

The opportunity:

Social is referring more traffic than ever before to Media and Entertainment sites. Look to incorporate more video and image related posts to capitalize on the increased social traffic.



Share of social referred visits

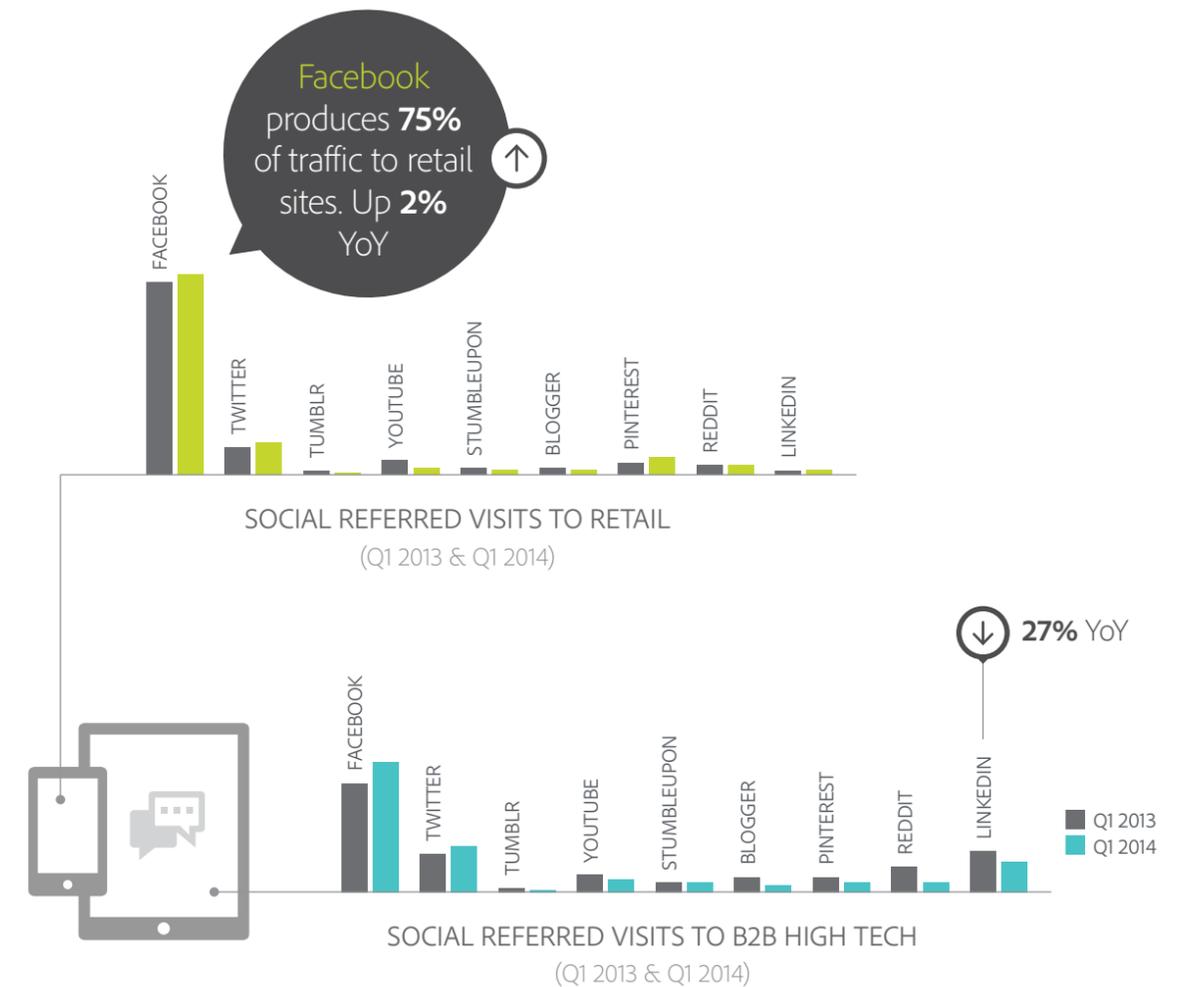
Updates to Facebook in Q4 helped increase its social share of traffic to Retail sites, but Facebook still has competition from LinkedIn and Twitter when it comes to social referred visits to B2B High Tech sites.

The findings:

- Facebook produces 75% of traffic to Retail sites, up 2% year-over-year and 13% quarter-over-quarter.
- Pinterest referred traffic to Retail is up 59% year-over-year, but down 56% quarter-over-quarter.
- LinkedIn refers 15% of social traffic to B2B High Tech companies, second only to Facebook, but is down 27% year-over-year.
- Facebook refers 52% of social traffic to B2B High Tech sites, up 34% year-over-year.

The opportunity:

LinkedIn, Twitter, and Facebook are real players for social traffic to B2B High Tech companies. Look to incorporate additional marketing spend to these networks.



Methodology

This report is based on consumer data from Adobe Social, Adobe Media Optimizer, and Adobe Analytics to brand sites during 2013 and 2014. It is comprised of aggregated and anonymous data from Retail, Media and Entertainment, and Travel websites. Ad data does not include retargeted ads on social media channels.

Sample information includes:

- 260 billion Facebook ad impressions
- 226 billion Facebook post impressions
- 17 billion referred visits from social sites

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Appendix

Facebook Engagement and Post Impressions Growth															
	Jan 2013	Feb 2013	Mar 2013	Apr 2013	May 2013	Jun 2013	Jul 2013	Aug 2013	Sept 2013	Oct 2013	Nov 2013	Dec 2013	Jan 2014	Feb 2014	Mar 2014
Engagement	100%	106%	114%	109%	120%	109%	124%	114%	110%	130%	123%	140%	157%	160%	151%
Impressions	100%	116%	129%	129%	131%	123%	131%	143%	186%	166%	156%	179%	195%	242%	260%

Social RPV Growth					
	Q1 2013	Q2 2013	Q3 2013	Q4 2013	Q1 2014
Facebook	\$1.05	\$1.05	\$0.93	\$1.22	\$1.24
Twitter	\$0.55	\$0.59	\$0.44	\$0.81	\$0.62
Pinterest	\$0.61	\$0.71	\$0.55	\$0.93	\$0.65
Tumblr	\$0.45	\$0.64	\$0.65	\$1.10	\$0.70

Facebook Ad Cost per Click (CPC) and Click Through Rate (CTR)					
	Q1 2013	Q2 2013	Q3 2013	Q4 2013	Q1 2014
CTR	100%	130%	256%	218%	260%
CPC	100%	90%	83%	110%	98%

Ad Clicks and Impressions					
	Q1 2013	Q2 2013	Q3 2013	Q4 2013	Q1 2014
Clicks	100.0%	126.9%	177.3%	114.7%	170.3%
Impressions	100.0%	107.7%	120.2%	99.6%	140.4%

Facebook Engagement Rate by Post Type		
	Q1 2013	Q1 2014
Image	5.0%	4.4%
Link	2.3%	1.4%
Text	1.7%	0.6%
Video	2.4%	3.0%

Facebook Share of Brand Post Engagement		
	Q1 2013	Q1 2014
Likes	82%	78%
Comments	12%	14%
Shares	6%	8%

Retail Social Referred Visits		
	Q1 2013	Q1 2014
Facebook	73.0%	74.5%
Twitter	10.8%	11.2%
Tumblr	1.1%	0.6%
YouTube	4.5%	1.8%
Stumbleupon	1.2%	0.7%
Blogger	1.9%	1.4%
Pinterest	3.6%	5.7%
Reddit	2.6%	2.5%
LinkedIn	1.4%	1.7%

Percent of Total Visits from Social Networks		
	Q1 2013	Q1 2014
Media and entertainment	6.0%	7.9%
Retail	2.4%	1.8%
Financial services	0.6%	0.6%
Travel	0.5%	0.4%
B2B high-tech	1.0%	0.8%

Facebook Brand Impressions and Engagement Type by Day		
	Post impressions	Engagement
Sunday	13.4%	3.0%
Monday	14.1%	3.0%
Tuesday	13.8%	3.0%
Wednesday	14.2%	3.0%
Thursday	14.5%	3.2%
Friday	15.7%	3.3%
Saturday	14.4%	3.1%

Facebook Share of Engagement Type by Day			
	Comments	Likes	Shares
Sunday	12.8%	14.6%	14.2%
Monday	13.8%	14.2%	14.3%
Tuesday	14.3%	13.1%	13.8%
Wednesday	14.9%	13.5%	14.4%
Thursday	14.1%	13.9%	14.1%
Friday	17.0%	16.1%	16.1%
Saturday	13.2%	14.7%	13.2%

Glossary

- **Click-through rate (CTR):** Clicks created per impression.
- **Cost per click (CPC):** Cost per click on an ad.
- **Cost per thousand (CPM):** Cost per thousand impressions of an ad.
- **First-click attribution:** Purchase attributed to the first click the consumer makes toward purchasing an item.
- **Geo-targeting:** Posts targeting a specific region.
- **Last-click attribution:** Purchase attributed to the last click the consumer makes toward purchasing an item.
- **Return on investment (ROI):** Ratio of revenue to cost across industries for Facebook ads — not including retargeted ads.
- **Revenue per visitor (RPV):** Revenue made per visitor.
- **Social engagement:** The volume of comments, likes, shares and other interactions with a brand post.
- **Social sentiment:** Ranking social mentions from 1 (negative) to 10 (positive) in order to track the effectiveness of social marketing efforts.

Recommendations

The first part of 2014 saw changes across multiple social networks, increasing the importance of video and image related posts. Customers and marketers have made Fridays more social in Q1 with the majority of posts and engagements happening at the end of the week.

Social networks will continue to make changes to entice marketers to invest in brand pages, advertising, and overall social strategies. To get the most out of social media investments, marketers will need to adapt to frequent algorithm changes and should look to make more pinpointed investments into targeting and management of social media ad and post spends.