Gartner for Marketers

To Reach the Most Brand-Engaged Consumers on Social, Invest Beyond the “Big 3” Networks
Evaluating potential social platform investments by levels of participation helps marketers identify opportunities for their messages to be heard more clearly and receptively. Savvy social media marketers diversify their brand presence beyond Facebook, Instagram and YouTube.
Overview

Key Challenges
• Marketing leaders see smaller social networks as unfamiliar, unproven territory. Lack of experience, data and insight into consumer behaviors across smaller platforms makes marketers hesitant about which additional networks to enlist to accomplish their social goals.
• Marketers know that distinct groups of consumers flock to smaller social platforms, but they don’t know who does that, or why. Learning the answers requires substantial effort and research that many marketers aren’t certain they should invest in.

Recommendations
Marketing leaders responsible for social media marketing:
• Determine what new platform territory to pursue by uncovering where their brand’s social strategy aligns with consumers’ degree of platform and brand engagement on smaller social networks.
• Deeply investigate the way their target consumers’ social media habits on smaller platforms differ from their experiences on the biggest platforms, especially when targeting Gen Z or multicultural consumers.
Introduction

The average consumer uses four social media platforms. Seven in 10 log on to social media at least once a day. These apps and sites are part of the fabric of life for most people, and marketers are well aware: Social marketing is already the fifth highest area of investment for marketing leaders, commanding 7.1% of the total marketing budget. While more than 60% of marketing leaders expect to increase spending on social marketing in 2019, most of them plan increases for the biggest platforms, including Facebook and YouTube. Conscientious marketers see early indicators that suggest the bloom is off the rose for consumers who use the biggest platforms. Yet these troubling developments haven't yet spurred marketers to make big shifts to diversify their investments across smaller platforms but they should.

Many consumers report conflicted feelings about their habitual use of big social platforms in the face of mounting privacy concerns and polarizing chatter. Most consumers in the U.S. say social media services do more to divide Americans than bring them together, and only about a third have positive feelings toward Facebook. Every week brings new, scandalous headlines forcing consumers to scrutinize their own use — from data breaches at Facebook to fake accounts on Instagram and inappropriate content or angry creators on YouTube. Michelle, a Boomer from suburban California and frequent Facebook user, sums up her grievances with social media in this way: “There are too many annoying and useless bots, spam, trolls. It’s difficult to separate the trash from the content I want to see. There is too much misinformation and negativity.”

As a result, some consumers simply contribute less or log in less often, but others quit altogether. In the last year, more than a third of consumers deleted an account on a social platform. Almost three-quarters (73%) say they use social media primarily to check out what others are doing, rather than to share updates about themselves — 8% more than said so in 2015. Marketing leaders are sensitive to these mounting concerns from consumers, but there is little they can do to prevent defections, let alone turn the tide on major systemic fiascoes. Social media marketers also continue to struggle to contend with ongoing algorithmic changes that make it ever harder for branded posts to reach as many consumer eyeballs as they would like.

Marketers can hedge against a decrease in consumer activity, receptivity and visibility on the biggest networks by supplementing with smaller networks. While these may be less populous, they house hotbeds of distinct consumer groups with very specific ideas about what should take place there. Marketers who meet these idiosyncratic expectations for engagement will benefit from the upsides of unsaturated, fresh social terrain: boosts in brand awareness and brand perception as well as a deeper understanding of consumer targets. This note teaches a model for pinpointing the alternative, “second-tier” networks rife with highly engaged consumers and helps marketers understand what specific consumer groups want and expect from each one.
Analysis

Supplement Social Strategy With Smaller Platforms Where Consumers Are Most Engaged

Smaller platforms offer marketers access to many of the same consumers that can be found on the large platforms, because most consumers on a second-tier network also use at least one of the first-tier, most-populous’ networks: Facebook, YouTube or Instagram. But though they’re the same people, the context is different. Interactions look different on these smaller platforms. Although second-tier platforms are, by their very definition, less popular, consumers who follow brands on them tend to be more engaged with those brands than they are on first-tier platforms. The smaller networks, then, punch above their weight. In fact, retailers with large shares of social traffic to their sites receive just as much inbound traffic from smaller platforms (e.g., Pinterest, Reddit) as they do from the biggest (e.g., Facebook, YouTube).

To parse how engaged consumers are on specific second-tier platforms and how receptive they are to interacting with brands on each, marketers should study two criteria: platform engagement and brand engagement. The engagement data in this note was derived from a consumer survey specifically designed to measure social media habits and behaviors:

Platform engagement
This criterion quantifies, on a spectrum from low to high, the relative amount of consumer activity and the “stickiness” of each second-tier platform. It measures how often users log in, how their frequency of use on the platform changed in the last year and how easy or difficult users said it would be to stop using the platform.

Brand engagement
This criterion quantifies, on a spectrum from low to high, the proportion of consumers receptive to interacting with brands and companies on each second-tier platform. It measures the relative number of consumers already following brands on the platform, how accepting they are of brand content in their feeds and how many of them prefer to use the platform as their primary channel for interacting with brands.
Consumers’ degree of platform engagement and brand engagement across social platforms

1. **Interact quadrant**
   - Open forums where users expect to connect, express their opinions and share information

2. **Connect quadrant**
   - Hosts of niche communities with unwritten rules that govern content and interactions among users

3. **Learn quadrant**
   - Hubs of location-specific information and reviews

4. **Accomplish quadrant**
   - Task-specific destinations, often used for collaborating, archiving, networking or other productivity-related duties

Figure 1. The second-tier social media landscape

Plotting platform engagement against brand engagement brings a field of 18 second-tier social platforms into focus and reveals four distinct groupings of smaller network types (see Figure 1):
By understanding the specific consumer attitudes and behaviors behind the usage of the platforms plotted in each quadrant, marketing leaders can locate the specific platforms where their target consumers are engaged. Then, they can begin to activate social strategies that take advantage of the unique attributes of their desired channel.

**Interact quadrant**
High platform engagement, high brand engagement

**Second-tier platforms:** Twitter, Medium, Pinterest, WhatsApp, Snapchat, WeChat

Social platforms in the Interact quadrant hold the most promise for marketing leaders to connect with receptive consumers, as the platforms in this quadrant are characterized by high platform and high brand engagement. Consumers are increasingly active on these platforms. Many of them follow brands already, and users say they are more open to interacting with brands here than on other smaller networks. Interactions span a wide range of behaviors and genres, and many consumers use each platform in this quadrant for a different purpose. For example, Tricia, a Millennial from suburban South Carolina, says she uses Twitter for “news and information,” Snapchat for “photo sharing” and Pinterest for “recipes and ideas.”

**Recommendation:** Engage consumers with social strategies that facilitate interactions among other consumers.

Coca-Cola used Snapchat to insert its brand into interactions where consumers were already sharing personal stories and photos with friends and family. Coca-Cola teamed up with MELT to create custom Snapchat filters for each stop on the College Gameday Tour and Bitmoji avatars for ESPN’s College Gameday talent. The Snapchat campaign covered 15 stops on the College Gameday Tour, utilized over 30 custom filters and had a total unique reach of over 3.8 million consumers.

**Connect quadrant**
High platform engagement, low brand engagement

**Second-tier platforms:** Discord, Reddit, Twitch

Social platforms in the Connect quadrant have high platform engagement but relatively low brand engagement. While consumers are increasingly active on these platforms, fewer follow brands and users are less welcoming of brand content in their feeds. Consumers seek like-minded others and share culture, entertainment and personal interests, but brands aren’t always welcome. Bryan, a Millennial from suburban Colorado, says he turns to Reddit “to see what actual people are saying without censorship butting in.”

**Recommendation:** Low brand engagement doesn’t mean low brand opportunity. It just means a higher bar to entry. Monitor the platform before diving in by conducting extensive social listening to understand the rules you must follow, and the sentiment users have toward your brand, so you don’t risk a chilly reception.

One way to listen in on the action and gather intel is to, like Audi, host interactions on these platforms that don’t put a brand or product at risk of getting downvoted into oblivion. To promote the Audi Sport division, Audi hosted a live broadcast celebrity AMA (Ask Me Anything) on Reddit from the passenger seat of an Audi driving at 130 MPH. But most of the questions were not about Audi at all. Celebrities including Elizabeth Banks and Adam Scott talked about everything from the work they do to outer space.
Learn quadrant
Low platform engagement, high brand engagement

Second-tier platforms: Foursquare, Yelp, TikTok

Consumers use these platforms less frequently than other smaller networks, when consumers log on, they’re often engaging with brands to gather business and restaurant reviews, consumer recommendations, and check-ins from their friends and other users. Elizabeth, a Millennial from urban New York, uses Yelp “to narrow down the overwhelming amount of options of places to see and eat at, especially when I'm traveling.”

Recommendation: The key here is to be easy to find — both online, and off. Inform consumers about your brand’s location or destination. Filter and tag information that facilitates consumers’ access and enables brands to harness relevant information about a consumer’s specific location.

MillerCoors uses Foursquare’s Pinpoint audience segments to inform its approach to sending location-based ads to its customers. Using categories of anonymized audience groups provided by Foursquare’s location data, MillerCoors is deriving how location data can assist in reaching consumers in small convenience stores, bars and restaurants.

Accomplish quadrant
Low platform engagement, low brand engagement

Second-tier platforms: Slack, LinkedIn, Quora, Tumblr, Flickr, Periscope

Social platforms in the Accomplish quadrant have the combined lowest degree of platform and brand engagement across second-tier social platforms, but this is changing, especially among the ones that are emergent newcomers. Right now, several are used primarily for work-related tasks and, thus, relatively infrequently. When consumers do spend time here, they’re rarely interacting with brands. Marissa, a Millennial from urban California, uses Slack because: “I have to have it for work.” As for LinkedIn, “It’s necessary for jobs.”

Recommendation: The lack of brand engagement here indicates, among other things, a lot of white space for brands. Help consumers enhance efficiency, collaboration or knowledge gathering while they’re laser-focused on the task at hand.

Domino’s gave a nod to efficiency and collaboration by creating a Slack app where consumer team members either order pizza via a direct Slack message to Domino’s or collaborate on a group order in a channel. The app is available in the Slack App Directory, where users can add and remove several different apps related to their workspace.
Dig Deeper on Smaller Platforms to Pinpoint Key Cohorts

The second-tier social media platform ecosystem looks different when plotted using the behavioral and attitudinal data of specific consumer groups. So, marketing leaders should get to know their target consumers’ social media habits on smaller platforms in a deeper way (vs. the biggest platforms) to identify where their key cohort is gathering en masse. This is especially pertinent for marketing leaders targeting Gen Z or multicultural consumers, because those users engage more frequently with second-tier social media platforms and follow the most brands across platforms compared to other cohorts.

Gen Z consumers habitually engage with social networks, and more than four in 10 are online on a near constant basis. This makes them a ripe target for brands on social, but their loyalty can be harder to earn, as more than half (56%) of Gen Z consumers have deleted an account on a social media platform compared to just 37% of the U.S. general population. Plotting Gen Z’s platform and brand engagement across second-tier networks as compared to the general population in the U.S. reveals which second-tier social platforms are clicking with Gen Z, and where they’re most open to interacting with brands (see Figure 2 on the next page).
The degree of platform engagement and brand engagement across select social platforms

- Gen Z consumers
- U.S. general population

Figure 2. The Gen Z second-tier social media landscape

Source: Gartner Social Media Survey, January 2019
It will come as no surprise to marketers that Gen Z consumers have markedly higher platform and brand engagement on Snapchat and Twitter than the rest of the U.S. population, indicating intense levels of activity. But Discord and Reddit actually qualify as Interact platforms for Gen Z — rather than Connect platforms like they do for the general population. This means that younger consumers are far more open to brand engagement in this terrain than others are.

More multicultural consumers — those who don’t identify as only Caucasian — endorse values related to self-expression (including individuality, identity and creativity) than white consumers do. These values manifest in their approach to social: 52% of African-Americans and 49% of Latinos and Asian-Americans believe that social media is in fact “the best way to share my voice,” compared to just 39% of Caucasian consumers. When it comes to second-tier platforms, multicultural consumers gravitate toward open platforms where users connect and express their opinions, including Twitter, Snapchat and Pinterest. They engage less on platforms that host niche-bordering-on-insular communities of users, including Reddit, Twitch and Discord (see Figure 3 on the next page).
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Figure 3. The multicultural second-tier social media landscape

The degree of platform engagement and brand engagement across social platforms

- Multicultural consumers
- Caucasian consumers

Source: Gartner Social Media Survey, January 2019
Recommendation: Pinpoint the smaller platforms where your brand’s key cohorts are overindexing, if anywhere, and tap into topics or content that resonate with users on those platforms.

AT&T’s social-media entertainment studio Hello Lab created a multiplatform show about high-school bullying called “Guilty Party” that used seven social platforms, including Discord, to tell the story in real time. A “Guilty Party” Discord channel was positioned as being “owned” by one of the show’s characters. As other characters were introduced, Discord fans grilled them, collaborated on homework assignments, shared clues and even asked for life advice. In addition, a “Guilty Party” bot allowed fans to identify themselves as “Team Alvaro” or “Team Dan,” and form their own subcommunities. The season has ended, but fans are still active on the Discord channel and use it as a safe space to continue to explore tough issues.
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