eMarketing

The **essential guide** to marketing in a digital world

7TH EDITION
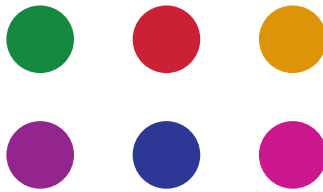
red & yellow
CREATIVE SCHOOL OF BUSINESS
HONORIS UNITED UNIVERSITIES

The **essential guide** to
marketing in a digital world

Red & Yellow

7th Edition

eMarketing

Dear Reader,

Since our 10th Anniversary Edition of *eMarketing: The Essential Guide to Marketing in a Digital World*, we have witnessed a global wave of change that has had an undeniable impact on how we live, connect, and communicate worldwide. There is no doubt that the COVID-19 pandemic has, and will continue to have, a lasting effect on human reality. With this in mind, we are incredibly proud to present the 7th Edition of our textbook.

The pandemic has sped up digital transformation and technologies by several years, which is why we've adopted an alternative approach to revisiting the contents of this textbook. Every digital marketing element has changed significantly since our last edition, and for this reason, we have aligned this textbook with the latest trends and developments in evolved marketing structures. Consumer and user-experience continue to influence all strategic marketing decisions, while technology and data-driven insights fuel decision-making to accelerate results for businesses.

We've revisited each part and changed the titles to **Planning**, **Claiming**, **Creating**, **Uniting**, **Advertising** and **Analysing** – a slight departure from our previous edition – to focus on the integration of technology and data in every aspect of marketing to enhance customer experience and secure business success through meaningful engagement and connections. We have reorganised the contents of this edition with updated statistics and new case studies.

You will notice that we have elaborated on planning and strategy to set the context and framework for digital marketing, with a strong focus on content as an essential part of **Creating**. The structure of the textbook explores why customers and data have become so essential to marketing, and how brands can use customer data to market more effectively. We have also included dedicated chapters like **Content marketing and value** and **Content creation** as the primary means to connect and engage with customers. Because of the evolution of technology and data-driven insights, we've dedicated three chapters to **Advertising** to unpack the extent of opportunities that have progressed over the past few years. An exciting new chapter titled **Future of advertising**, looks at how technology has and continues to change advertising into the future, as well as how marketers and business owners can take full advantage of authentic content and online connections to build brand presence and foster loyalty.

All the content has been critically reviewed by our experienced panel of subject matter experts who have given their time and expertise freely to deliver this comprehensive and insightful edition. Their commitment and support, thereby giving back to the digital community, made this possible. We are incredibly proud of this achievement, and we thank every person who has contributed. We are humbled by the relentless pursuit to deliver this book, despite the copious amount of work it has taken. We believe that knowledge is power and developing the skills to action this power is what sets the achievers apart from the rest. We believe that for education to have an effective future, it needs partnership between the private and academic sectors to ensure students are being taught the latest thinking from the coalface of business innovation. By making our textbook available for free online, we hope to ensure that the very

best education is as accessible as it can be to as many people as possible. In fact, less than 10% of the many institutions who use our book pay for it, and we are delighted by this. We want to make a lasting impression, and this is an important part of us achieving that.

We hope you enjoy our book and remember, the most important thing any human can do is teach, even if you're not a teacher. Share your knowledge and make the world a better place.

If you want to go quickly, go alone. If you want to go far, go together.
African proverb

ACKNOWLEDGEMENTS

CONTRIBUTORS

This 7th edition is our first edition in a post-Covid world and arrives in a world that has seen dramatic change and acceleration in all things digital. It is also the first edition we've produced following Red & Yellow's acquisition by Honoris United Universities in 2020.

As has been the experience of so many tertiary institutions and businesses, the last two years have brought about great change for our school. Whilst many of the people who have worked on this edition are new and have brought with them fresh ideas and perspectives, they are also fortunate to have stood on the shoulders of the marketing giants who have preceded them. We will forever be grateful for the efforts of each person who played a role in the evolution and continued success of this textbook. We want to acknowledge the following people in particular:

Ashton van den Bergh
Bianca Carebern
Dr Carla Enslin
Carmia Lureman-Norton
Catherine Scott
Craig Raw
Daniel Kolossa
Daniel Neville
Emma Carpenter
Emma Drummond
Georgina Armstrong
Gerard du Plessis
Graeme Stiles
Heidi Ocker
Heléne Lindsay
James Lennox
James Mckay
Jean du Plessis
Jeandri Robertson
Jo Glover
John Beale
Jonathan Gluckman
Justin Spratt
Katharina Scholtz
Kathryn McKay
Keryn Brews

Linah Maigurira
Marcel Nel
Matt Willis
Melody Maker
Michael Oelschig
Michael Walker
Michaela Kissack
Mike Stopforth
Nic van den Berg
Nikki Cockcroft
Peta Broomberg
Reino Jansen van Rensburg
Richard Mullins
Richard Palmer
Richelle Chapman
Rob Stokes
Sam Beckbessinger
Sarah Blake
Sarah Manners
Scott Gray
Shae Leigh
Su Little
Taya Botha
Tim Withers
Wendy Shepherd
Wouter de Vos

REVIEWS

Reviews for previous editions

In teaching my postgraduate course, *eMarketing* has been the textbook of choice for years. It presents a great blend of marketing strategy information with detailed but digestible technical explanations of the digital space. The material is presented in a way that remains current and relevant, despite the constantly evolving world of digital marketing. Students also appreciate the open-source content, making it a go-to resource each semester.

Prof. Anne Cramer (*Professor, Fashion Faculty of Business, Humber Institute of Technology and Advanced Learning*)

eMarketing: The Essential Guide to Marketing in a Digital World provides rich detail without overwhelming the reader with technical jargon. Overall, the author does a great job in presenting somewhat more complex issues in user-friendly ways. The book situates some examples in a South African context, but it should be meaningful in any cultural context.

Dr. Reto Felix (*Associate Professor of Marketing, University of Texas Rio Grande Valley, Department of Marketing*)

This book has been put together by some of the sharpest minds in the digital marketing and education fields, and the combination of deep subject matter expertise and pedagogic nous is powerfully telling. The book is at once informative, accessible, and practical - a must read for anyone looking to enter the industry or to better come to grips with an ever-changing dynamic landscape.

Carlos Menezes (*Digital Marketing Specialist and Global Solutions Partner at FAANG Company*)
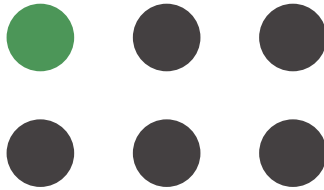
PLANNING

INTRODUCTION TO PLANNING

Advertising and marketing were once the domain of a few powerful people who told customers what they wanted. Customers are no longer told what they want. The pervasiveness of digital technology has empowered the customer when it comes to making purchasing decisions. They tell businesses what they want, how, and when.

Marketing and digital marketing, in particular, has created a symbiotic relationship between businesses and their customers. The proliferation of digital tools and the internet has opened a free-flowing, two-way marketing channel into our daily lives.

Digital marketing does not deviate much from traditional marketing. However, it does offer unique opportunities that used to be more difficult to execute. For example, marketing campaigns can now be easily tailored to target specific customers, 'attention for value' can be leveraged to create consumer demand, and the customer experience can be personalised and leads to a far higher return on investment.

All of this means that planning is an essential part of an effective marketing strategy that has impact. If you don't plan, you risk a sloppy marketing campaign, one that is inconsistent in its messaging, and carries reputational risk. As the cliché goes: 'If you fail to plan, you plan to fail.'

Planning means taking a big picture view of your customers, and then using these insights to further distil what makes your product special, and how to target your customers. For example, you need to consider the way people use their devices before you even consider what medium you will use to target your customer.

While existing and operating in a digital world has its risk, the opportunities are huge. There are immense advantages to digital marketing that can guarantee higher rates of return on investment. Digital marketing can be low cost, flexible, convenient, and targeted.

Chapter 1: Introduction to marketing tackles how the internet has changed marketing and how to think about digital audiences. You will learn how to leverage the advantages of digital marketing and through data analytics, discover that there is no excuse for not reaching your audience and getting your product or service into their hands.

Chapter 2: Importance of the customer focuses on the use of demographics and psychographics to develop user personas, and how extrinsic and intrinsic motivators encourage brand recognition and loyalty.

Chapter 3: Market research discusses the importance of conducting market research and how to use this research and data to inform your strategy.

Chapter 4: Strategy defines business strategy with the goal (other than making your customer happy) to use research to inform your plan of action. You will understand how consumer behaviour affects strategy and ultimately, get to a place where you understand the *how* and the *why*, and to use the *why* to realise the *how*.

01

INTRODUCTION TO MARKETING

In this chapter, you will learn:

- What the internet is and how it has changed marketing
- How to define and distinguish marketing and digital marketing
- How to think about digital audiences
- About the importance of data-driven decision making.

1.1 INTRODUCTION

Where there is a product or service, there must be a way to get it into a customer's hands. Some of the primary functions of marketing include planning, promoting, persuading, managing channels and information, pricing, product service management, and selling. Digital marketing offers a unique opportunity to tailor marketing campaigns to target specific customers. If done properly, this can result in a higher return on investment (ROI), which is the ratio of cost to profit. Digital marketing also allows for more scope in terms of branding and public relations through content marketing. However, this also poses risk. The internet moves fast, and reputational damage is possible in a heartbeat if campaigns and digital marketing strategies are not carefully thought out and planned. In this chapter, you will be introduced to digital marketing, creating a foundation on which you can build your digital marketing strategy.

1.2 KEY TERMS AND CONCEPTS

Table 1.1

Term	Description
Sales	When a company enters into a direct commercial transaction with customers.
Advertising	The payment to place promotional images in a variety of online and offline media.
Public relations (PR)	The process of creating a positive impression of the brand and its activities among the general public.
Distribution	The process of ensuring products and services are available where and when they are needed.
Content marketing	Happens when sharing valuable, entertaining content that is not directly aimed at generating sales.
Packaging	The process of reflecting the product's qualities and benefits in an appropriate and effective way through physical packaging.
Events	The hosting or sponsoring of events that enhance the brand's reputation, raise awareness, and reflect its values.

1.3 WHAT IS MARKETING?

Marketing is the creation and satisfaction of demand for your product, service, or idea. If marketing is successful, it will create demand; this demand should translate into sales and, ultimately, revenue. Kotler (2012) described marketing as follows:

The science and art of exploring, creating, and delivering value to satisfy the needs of a target market at a profit. Marketing identifies unfulfilled needs and desires. It defines, measures, and quantifies the size of the identified market and the profit potential.

The American Marketing Association (2017) defines marketing as follows:

The activity, set of institutions, and processes for creating, communicating, delivering, and exchanging offerings that have value for customers, clients, partners, and society at large.

The design of the product or service itself is, arguably, a function of marketing – this is where meaningful benefits and value for the customer are created. Once the product or service exists, you need to get it into customers' hands and motivate them to pay for it. Even better, you need to convince the customer that your product, service, or organisation is superior to your competitors. To do this, you need to convince the customer of your product's benefits and value. The value that a marketer should seek to create should be equal to or even greater than the cost of the product to the consumer. Doing this often and consistently will grow trust in and loyalty towards the brand and create strong brand equity.

1.3.1 Business goals

The goal of a business is to sell services and products to generate a profit. Marketing is the sum total of activities and strategies that a business undertakes to encourage people and other businesses to buy (and continue buying) its products and services. Every business benefits from marketing, and each one needs to create a tailored mix of approaches and tactics that suit it, its budget, its offering, and its target customers.

Marketing enables customers to buy products by fulfilling the following roles:

- **Awareness:** Marketing lets people know about brands and products. Customers can't buy something they don't know about. Therefore the first essential role of marketing is to raise awareness of an offering among the target group who is likely to buy it.
- **Information:** Marketing tells people when, where, and how to buy products. Once a person knows about a product, they need some basic information in order to buy it. A brand's marketing strategy should always include information that enables customers to easily make a purchase.
- **Persuasion:** Marketing makes people want a product. Once someone knows a product exists, they need to be convinced that it is worth their time, money, and effort to obtain it. Marketing strives to create an emotional connection between person and product or brand.
- **Affinity:** Marketing makes people love brands and products. A customer is much more likely to buy a product that makes them feel great, shares their values, and entertains them. Many established brands focus their marketing efforts on building and improving sentiment – just think about how passionate Apple, adidas, or Tabasco fans are about their favourite brands, and what an impact this can have on their success.

The role of marketing is to inform, entice, educate, excite, and persuade people to buy services or products. Marketing aims to influence the perceptions of people in favour of the brand and its offering, with the ultimate goal of getting them to make a purchase (and continue to make purchases in the future and to become return customers). It does this through two complementary approaches:

1. **Factual:** This approach appeals to the intellect and relies on clear facts, features, benefits, and rational arguments that indicate why a product is a good choice, for example: "This solar heater lets you save 60% off your monthly electricity bill."
2. **Emotional:** This approach relies on tapping into people's feelings, aspirations, hopes, fears and dreams to encourage emotive, impulse purchases, for example: "This solar heater could be your contribution to saving the environment and protecting the planet we live on."

One of the most important concepts for marketers to internalise is that people don't buy products; they buy what the product can do for them, how it makes them feel, or what it says about them.

Nobody buys a hammer for the sake of owning a hammer; they are buying the ability to repair a broken appliance, enjoy some hobby DIY, or appear capable. A TAGHeuer wristwatch doesn't do anything a Casio couldn't, but it indicates a person who values masculinity, innovation, and precision.

Extrapolating from this, marketing is about showing your potential customers how your offering can make them awesome, successful, and better.

The first step to developing a marketing strategy is to understand your environment, your customers, and how to access these customers.

1.4 UNDERSTANDING YOUR ENVIRONMENT

Your brand does not exist in a vacuum. There are multiple factors affecting your business right at this very moment. Your business has control over some of these elements, while it has no control over others.

1.4.1 Micro factors

Micro factors are mostly internal elements or factors that you and your business have some control over, such as your brand, your brand or product's unique selling point (USP), and any digital offerings.

It should be noted that, while you have some control over micro factors that affect your business, these are informed by macro factors. It is important to keep this in mind when you are doing any kind of strategic planning, or simply day-to-day brand management. You could say that macro factors are the 'bigger picture', while micro factors are the details. You need to keep an eye on the bigger picture without losing sight of the details, and vice versa.

Let's take a closer look at this.
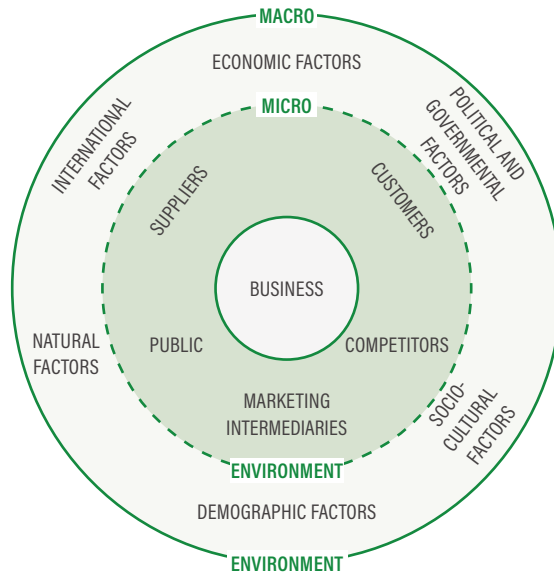
Figure 1.1 Micro and macro factors affecting a business

Your brand

Your company or business is the factor that you have the most control over. You decide how the brand comes across to the world – your brand identity. Here are some important questions to ask yourself about your brand:

✓ Who are you?
✓ Who are you for?
✓ What does your brand stand for?
✓ What does your brand stand against?
✓ What is your USP?
✓ How do you find customers? (i.e., Do you have a website/app? Which social media platforms do you use? Where and how do you advertise online?)
✓ How do you treat customers (past, existing, and future)?

> **NOTE** Watch this video of Professor John Simpson explaining USP: vimeo.com/284613311/9d3ca7d8f4

Aside from the product or service you offer, your brand is your most important currency. It is the thing that people will remember (for better or for worse). However, it is easy to fall into a trap of insincerity. Ensure that your brand is aligned to your company's values. Exposure for the sake of exposure is not always a good thing. Your brand must be sensitive to macro factors, as well as your own internal values and goals.

1.4.2 Macro factors

You can control what you present to the world, to a degree. Unfortunately, there is little you can do about how the world sees you.

Macro factors are aspects that are beyond your business's control. Macro factors are the opportunities as well as the threats to your business. These can include:

- The state of the local or global economy
- Current trends
- Current events
- The opportunity or threat presented by a specific thing 'going viral'.

> **NOTE**
> Opportunities and risks will be explored in greater detail in **Chapter 4: Strategy**.

1.5 WHAT IS DIGITAL MARKETING?

How does digital marketing fit into this definition? There is, in fact, no difference between 'traditional' marketing and digital marketing. They are one and the same, apart from digital being specific to a medium.

Ultimately, the aim of any type of marketing is to keep and grow a customer base and stimulate sales in the future. Digital communication tools contribute to connecting and building long-term relationships with customers.

What is digital?

> *A participatory layer of all media that allows users to self-select their own experiences, and affords marketers the ability to bridge media, gain feedback, iterate their message, and collect relationships* (Caddell, 2013).

Digital is a way of exploring content and ideas (for users) and connecting with and understanding customers (for marketers).

Digital marketing is powerful in two fundamental ways. Firstly, the audience can be segmented very precisely, even down to factors like current location and recent brand interactions, which means that messages can (and must) be personalised and tailored for them.

Secondly, the digital sphere is almost completely measurable. Every minute and every click by a customer can be accounted for. In digital marketing, you can see exactly how various campaigns are performing, which channels bring the most benefit, and where your efforts are best focused. Cumulatively, access to data

> **NOTE**
> You will learn more about data-driven decision making throughout this textbook. Data-driven decision making is a powerful tool for all aspects of marketing and brand management.

that measures the whole customer experience should lead to data-driven decision making.

1.5.1 The digital audience

In the simplest terms, a digital audience is your online target audience.

The COVID-19 pandemic resulted in a marked shift in the way people access the things they want and need. While people were increasingly moving online in many parts of the world, they were looking for specific products and services. People still sought out many, if not most, products and services in traditional ways. For example, a person may do bulk shopping on a website such as Amazon, but do their daily grocery shopping at an actual store. Or, a person may from time-to-time purchase clothing on sites such as Alibaba or Shein, but still visit clothing stores for unique pieces.

However, during the lockdowns that followed the outbreak of COVID-19, people were forced to move most, if not all, of their shopping online in some way. For instance, there was a huge spike in on-demand grocery delivery services, as this was safer and more convenient. In South Africa, one of the largest supermarket chains, Checkers, launched their on-demand delivery app and service, Checkers Sixty60, months before hard lockdown was announced in March 2020. This service met the needs of a population but, more than that, it simplified a chore that is generally quite tedious.

The service was a huge success, with competitors scrambling to catch up. Even after lockdown regulations were eased, many customers continued to use the service regularly.

Convenience and speed are driving customers online more and more. The rise of social media and the internet of things (IoT) has also increased the rate of a migration to digital. Customers have certain expectations, and one of these is that they are able to investigate, access, acquire, and talk about a product or service online.

Like any target audience, it is important to be as specific as possible when it comes to reaching out. It is tempting to consider your digital audience as a homogenous group and only one segment of your overall audience, but the past decade has shown that this is not an effective strategy.

1.5.2 Data-driven decision making

A benefit of digital marketing is that you do not have to theorise, guess, or rely on 'gut feel' in pursuit of customers who want and will pay for your product or service. The internet provides real-time data, which you can use to improve your business and marketing decisions.

You can use data to be:

*   **Descriptive:** Use raw data to describe the market.
*   **Diagnostic:** Find out 'why' and look for patterns.
*   **Predictive:** Analyse data, both past and current, to predict future sales, revenue, and market changes.
*   **Prescriptive:** Use the findings of the previous three types of data analytics to determine a possible solution to a problem, thereby delivering value.

In addition to having access to more raw data than ever before, which is current and based on user behaviour, the internet makes it possible for a business to pivot, or to change direction, far more quickly. This agility allows for a business to meet actual needs and current trends, rather than perceived needs and desires.

> **NOTE**
>
> Learn more about data-driven decision making in **Chapter 20: Tracking and analysis**.

Two major data-collection trends that are relevant and useful for digital marketing are the rise of social media and the 'internet of me.'

Social media

Briefly, social media refers to social networking sites and apps, such as Facebook, Twitter, Instagram, and TikTok. The content on these platforms is, by and large, user generated, however, social media advertising has been a fast-growing marketing option since the mid-2000s.

Social media allows customers to be part of a conversation, which can drive interest to a business's social media profile, their website, or even a brick-and-mortar store. In addition, social media makes it possible for the collection of big data, as well as user-specific data.

The internet of me

The 'internet of me' is a broad term, which refers to technology that allows people to take their bodies and minds online. At present, this includes:

- Self-tracking technology on smartphones or smartwatches (i.e., Clue or Flo, which a woman can use to track their menstrual cycle).
- Wearable technology (i.e., Apple watches, Garmin, Fitbit, which track everything from a user's sleep patterns to their heart rate throughout the day).

Tied to the ability to gather and mine more data, the 'internet of me' is also creating unique opportunities for marketers to find, target, impress, and retain customers. Smartwatches, for example, allow users to input data to track everything from exercise to menstrual cycles to calorie consumption. Many smartwatches also track personal data in the background, such as sleep or heart rate.

1.6 MARKETING AND THE INTERNET

The complete scope of digital marketing is practised on the internet. Products and services are positioned and promoted, purchased, distributed, and serviced. The web provides consumers with more choice, more influence, and more power. On the internet, brands constantly have:

- New ways of selling
- New products and services to sell
- New markets to which they can sell.

Digital marketing helps to create consumer demand by using the power of the interconnected, interactive web. It enables the exchange of currency but, more than that, it enables the exchange of attention for value.
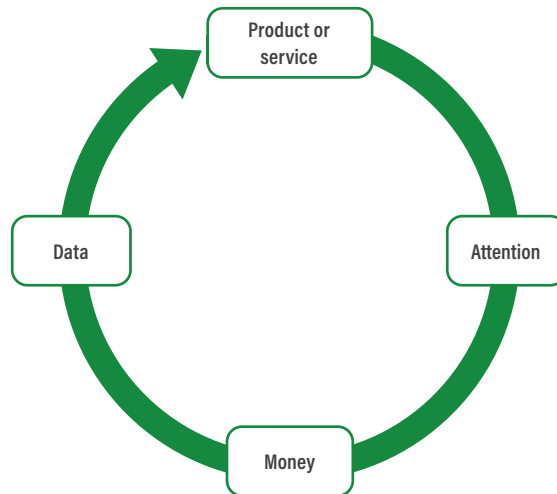
Figure 1.2 An exchange of value

If marketing creates and satisfies demand, digital marketing drives the creation of demand using the power of the internet and satisfies this demand in new and innovative ways.

A brand on the internet can gain value in the form of time, attention, and advocacy from the consumer. For the user, value can be added in the form of entertainment, education, and utility. Brands build loyalty among users who love their products or services and must align with users' values and aspirations. Users fall in love with products and services when their experience is tailored to *their* needs, and not the needs of the brand. The internet makes this possible by closing the gap between who creates the product and who uses the product. In this way, customers themselves become part of the marketing project.

1.6.1 Understanding the internet

There is no doubt about it: the internet has changed the world we live in. Never before has it been so easy to access information, communicate with people all over the globe, and share articles, videos, photos, and all manner of media.

But, what is the internet? And how has it changed marketing?

The internet is, simply, a network of networks. Its proliferation has led to an increasingly connected communications environment. Not only does the internet offer marketers wider audience reach, it also allows for tracking and data gathering, which can inform future campaigns and, even, product development. What started as pop-up ads on basic webpages has become far more sophisticated and powerful. The internet has certainly moved on from its early beginnings, and marketers are well positioned to reap the benefits.

The internet is almost ubiquitous in today's world. Even in less economically developed countries, digital marketing is possible, and effective, because of social media access. This is primarily driven by the rise in smartphones and more affordable data in most countries. People who were previously excluded from using the internet because they did not have access to a computer or internet connection, now have access to the internet and social media on their phones.

Look at Figure 1.2 below, which shows the number of unique mobile phone users, internet users, and active social media users. Almost 60% of the world's population uses the internet, and just over 50% of the world's population is active on social media.

Figure 1.3 Digital use around the world

1.6.2 How people access the internet

People connect to the internet and access content in many different ways. When it comes to the physical connection to the internet, the market presents a number of options, such as Dial-up, 3G, 4G, and 5G connection, wifi and WiMAX, Broadband, and ADSL.

The devices people use to access the internet vary from mobile phones and tablets, to personal notebooks and desktop computers.

The environment that people are in when they access the internet also differs. People can access and use the internet:

* At home
* At the office, or place of work
* At a library
* At school, college, university, or other education centre

- At an internet café
- On the go (using portable devices, such as mobile phones, laptops, or tablets).

Not only do these environmental factors affect how people use the internet, but their reasons for using the internet also have an effect on how they interact online.

For some people, the internet is primarily a communications channel, and their online activity is focused on social media or their email inbox. For others, it may be a research channel, with search engines playing a large role in their online experience.

1.6.3 What does the internet have to do with marketing?

The growth of internet usage has resulted in declining distribution of traditional media, such as television, radio, newspapers, and magazines. These were once important marketing channels, as they offered a way for marketers to connect with audiences.

Consider this example: In the late 1980s through the early 2000s, many families watched television on a daily basis. They had limited options when deciding how, when, and where to watch programmes on television. Over an hour, the show may have had six to seven ad breaks, which the viewer was forced to watch – they did not have the ability to fast-forward through the ads. However, as the internet has become more and more ubiquitous, and as data has become more affordable, streaming has become the preferred way to watch television. When a viewer is streaming a show, there are no ad breaks or, at least, the viewer has the option to fast-forward and ignore them.

So, where marketers once had a captive audience (the television viewer), this model has changed, necessitating a shift in how companies tell customers about their products. The rise of streaming platforms, such as Netflix, has necessitated a shift in how marketers reach customers that they previously would have had contact with through TV advertising.

The way people use their devices, such as their laptops, mobile phones, or desktop computers, also influences marketing activities and campaigns. For example, if your target audience is the parents of small children and your research has turned up the fact that most of your customers use a social media app, such as Facebook, after their children have gone to bed, it would affect your scheduling. In this case, hosting a live Facebook event at 6 p.m., when most parents are cooking dinner and getting children ready for bed, would not be well attended and would not have the desired reach. However, scheduling it in for 8 p.m. will be far more successful. It may also mean that all parents attend, instead of just the primary caregiver. In this example, you want to give parents less to worry about. Your scheduling should therefore be practical, and the technical aspects of the event should be seamless. If parents struggle to log in or register, they will rather not bother; it's just one more thing to add to their to-do list.

By really considering your target audience, you can eliminate potential problems before they even arise. This will result in a successful campaign and goodwill towards your brand.

1.6.4 What makes online marketing so special?

This is not to say that advertising should be solely online. Your online and offline marketing efforts are not separate. These two should ideally work in conjunction with each other. You may think that you don't need to put effort into your digital marketing because people don't buy as much online, but this is rapidly changing. Many brands are starting to concentrate on their online presence as much as their offline presence.

Over the past few decades, marketers have begun to wake up to the power of the internet, both as a platform for communication and as a way of tracking conversations. Marketing is about conversations, and the internet facilitates these on a global scale.

As shown in Table 1.2 online marketing has definite benefits that do not apply to offline marketing.

Table 1.2 The benefits of online marketing

Low cost: Online marketing allows for lower production costs, speed-to-market, cost-efficient customer feedback, and wider advertising reach at lower costs than offline marketing.	**Flexibility and convenience:** The marketer can switch creatively mid-campaign, based on instant feedback. Consumers can also research and purchase products and services at their leisure. This means businesses need to offer them what they want and use careful targeting to ensure they are reaching the right people.
Targeting: Online marketing offers exceptionally specific targeting, including demographic, geographic, browser, channel, and behavioural and interest targeting, helping to reach the right people in the right place and at the right time, to encourage conversions.	**More options:** Advertising tools include pay-per-click advertising, email marketing, local search integration, and much more.
Analytics: The best part of online marketing is how measurable it is. You can measure pretty much everything you do online. Consider traditional marketing: You might purchase a billboard. You have an idea of how many cars drive past that billboard each day, and you hope that the people in those cars notice it. With digital, you can place a social media ad or a banner ad, and you'll know exactly how many people had the opportunity to see it and what their reactions were. Google Analytics and other free analytics tools make it easy to measure the performance of marketing efforts and optimise them for the best results.	

1.6.5 What are the affordances of digital?

On a surface level, it is good to know what type of digital marketing is available to your business. However, it is also important to understand the properties of digital, in other words, its properties and what it is used for. This is known as the affordances.

For example, the affordance of a banana is eating. The banana exists, and we can explain what it looks like, but unless we understand *what it is used for*, it is not useful to describe it.

In a similar way, digital marketing offers opportunities for tailoring how you target and engage with customers. There are several ways to think about the affordances of a particular digital marketing tool. Firstly, understand the affordances of digital as a whole which offers:

- Information
- Connection
- Community
- Convenience
- Power and influence
- Feedback.

Then, consider the affordances of particular platforms below:

Business's website	Business's social media accounts (Facebook, Twitter, Instagram, TikTok, etc.)
Information Convenience	Information Connection Community Convenience Feedback

Taking the time to properly consider the affordances of digital allows for businesses to be more human-centric, driven by data to gain insight into customers' lives, opinions, needs, desires, weaknesses, and more to inform design and approach.

1.7 WHAT IS A COMMUNICATION CHANNEL?

A communication channel is the route through which a business or brand communicates with the customer.
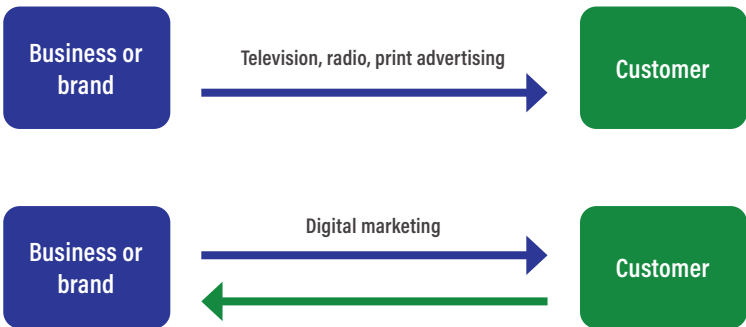
Figure 1.4 The communication channel

Digital marketing makes it possible to put the customer at the centre of your digital marketing strategy. This is because there is a greater sense of community online. Whereas a radio advert is one-way communication, digital marketing, particularly on social media platforms, allows for two-way communication.

It is important to factor this in when you are developing your marketing strategy. There is a time and place for both forms of communication, however, this will depend on your product, the customer, your budget, and your strategic goals.

> **NOTE**
> You will learn more about this in **Chapter 4: Strategy.**

1.7.1 Employing an omnichannel approach

It is tempting to stick with what you know, especially when it comes to a form of marketing that is as ever-evolving as digital marketing. However, your customers are not homogenous in their dreams, desires, ambitions, or lifestyles. Digital marketing offers you an opportunity to find a common thread between all of these potential and existing customers and to pull at that in order to convert attention into sales. By sticking with one approach, you risk missing a segment of customers entirely or frustrating a segment of customers who are used to choices.

The term 'omnichannel' refers to a business strategy that offers "seamless and effortless, high quality customer experiences that occur within and between contact channels" (Frost & Sullivan, 2020).

An example of this is a retailer who has both an online presence (web store, social media store), as well as a brick-and-mortar store. This retailer offers customers multiple options in terms of purchasing products, including:

*   The ability to shop online, with delivery to their door
*   The ability to shop in person, which allows them to browse and possibly try the product
*   The ability to research online, ahead of visiting the brick-and-mortar store.

> **NOTE**
> You will explore the omnichannel approach in greater detail in **Chapter 22: Future of advertising.**

1.8 CASE STUDY: SPRINT
AN OMNICHANNEL APPROACH TO INCREASE SALES

Sprint Corporation was an American telecommunications company, which has now merged with T-Mobile. Before the merger, Sprint was the fourth-largest mobile network operator in the USA.

One-line summary

In 2017, Sprint, a US-based mobile network operation, performed an experiment with Google Ads to test how digital advertising impacted the business's revenue.

The problem

Executives at Sprint were interested in how digital marketing spend impacted digital and in-store sales. Acknowledging the challenges that traditional marketing campaigns presented when quantifying sales and impact, Sprint decided to isolate the impact that paid Google search would have on driving sales.

Initially, Sprint looked at its normal marketing approach and predicted its online and offline sales. They looked at consumer behaviour, trends, and seasonal purchasing cycles. Once the company put this data together, creating a 'control', Sprint increased its investment into paid search by a set amount over its usual budget.

The mobile network let it run for eight weeks and then compared the actual sales with their predicted sales.

The solution

Sprint found that not only did online sales increase, so did retail sales. Compared to predictions, Sprint saw a 20% increase in digital sales and a 32% increase in in-store sales.

What this highlighted for the company was not that digital marketing should take precedence over traditional marketing, but that Sprint needed to ensure a consistent omnichannel approach. To quote Rob Roy (Sprint Chief Digital Officer) and Wouter Blok (Sprint Vice President of Digital Marketing): "Are you actually limiting the power of a digital campaign if you build it with the assumption that it will only affect online sales or underestimating the impact it has on in-store sales?"

The results

Following the experiment, Sprint increased its digital experimentation budget by 20%, with the aim of reaching new customers and collecting data to drive their business strategy of signing up new subscribers. The company also focused on consistency across the brand, so that customers who saw a campaign online would be able to walk into a store and access the exact same offer.

(Source: Roy and Blok, 2017)

1.9 CASE STUDY QUESTIONS

1. Why was it useful for executives to understand how digital marketing spend impacted overall sales?
2. Describe what an 'omnichannel' approach means.
3. What did Sprint's omnichannel approach look like?
4. What was the key learning for Sprint after successfully completing the experiment to increase sales?

1.10 THE BIGGER PICTURE

Digital marketing in the past has felt like a shiny, new toy that few people knew how to use properly. It is important to understand that at the heart of all of your marketing activities – whether on-line or offline – is the customer and their experience of your product or service. No amount of fancy digital marketing will make a poor experience feel better. It is, therefore, important to approach your marketing strategy holistically. Do not forget about the fundamentals of marketing – these have not changed; it is simply the delivery that has changed. Data-driven decisions have the power to change your business and to ensure that your customer is satisfied and talking about your product or service. Used properly, digital marketing is a powerful tool that you can leverage to promote, persuade, set pricing, manage services, and sell.

1.11 SUMMARY

Marketing is the creation and satisfaction of demand for your product, service, or ideas. If marketing is successful, it will create demand; this demand should translate into sales and, ultimately, revenue. Digital marketing offers an opportunity to tailor marketing campaigns to target specific customers. It also allows for more scope in terms of branding and public relations through content marketing. Digital marketing is a two-way communication between the brand and the customer, providing the business with valuable data that it can use to inform better product and service design.

The affordances of digital go beyond traditional modes of advertising and marketing. As well as information, digital marketing affords community, connection, feedback, and convenience. This makes digital marketing a powerful tool, if used properly.

1.12 CHAPTER QUESTIONS

1. Why is it important to consider the business context when planning your marketing strategy?
2. How has the internet affected marketing and the models we use to understand it?
3. Do you agree with the idea that customers are more empowered than they were before digital communications were so prevalent? Justify your answer.

1.13 FURTHER READING

Positioning: The Battle for Your Mind – This book by Ries & Trout published in 2002 offers excellent advice about claiming space in the minds of consumers.

smithery.co – A marketing and innovation blog that teaches professionals to "Make Things People Want, rather than spend all their energy and resources trying to Make People Want Things".

www.adverblog.com – A digital marketing blog that collates ideas from marketing campaigns around the world.

www.gigaom.com – GigaOM's community of writers covers a wide range of technological copies.

www.sethgodin.typepad.com – Seth Godin's popular blog provides regular insight and food for thought.

1.14 REFERENCES

Brilliant Noise, 2012. Brilliant Model: the Loyalty Loop. [Online]
Available at: brilliantnoise.com/brilliant-model-the-loyalty-loop/#more-3873
[Accessed 28 February 2022].

Dowd, M., 2015. Case Study: Vectors of Disruption – The Uber Story. [Online]
Available at: www.linkedin.com/pulse/vectors-disruption-uber-story-marc-dowd
[Accessed 5 March 2022].

Houlder, V., 2016. Uber faces huge UK tax liabilities if drivers not 'self-employed'. [Online]
Available at: www.ft.com/content/c7da2d92-a1c3-11e6-aa83-bcb58d1d2193
[Accessed 5 March 2022].

Kokalitcheva, K., 2016. Uber Now Has 40 Million Monthly Riders Worldwide. [Online]
Available at: fortune.com/2016/10/20/uber-app-riders/
[Accessed 4 March 2022].

Kotler, P., 2012. What is marketing? [Online]
Available at: www.kotlermarketing.com/phil_questions.shtml#answer3
[Accessed 28 February 2022].

Noesis Marketing, 2011. Building a Brand Pyramid. [Online] [Image]
Available at: www.noesismarketing.com/building-a-brand-pyramid
[Accessed 22 May 2022].

Porter, M., 2008. The Five Competitive Forces That Shape Strategy in *Harvard Business Review*, January 2008, p86–104.

YouTube, 2017. Statistics. [Online]
Available at: www.statista.com/topics/2019/youtube
[Accessed 22 May 2022].

Roy, R., Blok, W., 2017. The digital halo is real, but it requires an experimental approach. [Online]
Available at: www.thinkwithgoogle.com/future-of-marketing/digital-transformation/omnichannel-marketing-digital-spending-experiment-measurement/
[Accessed 17 January 2022].

Sowden, T., 2021. Five Strategies to Build a Digital Audience Post-Pandemic. [Online]
Available at: www.forbes.com/sites/forbestechcouncil/2021/08/25/five-strategies-to-build-a-digital-audience-post-pandemic/?sh=5ef477273293
[Accessed 1 February 2022].

1.15 FIGURE ACKNOWLEDGEMENTS

Figure 1.1: www.businessmanagementideas.com/business-environment/environment-of-business-micro-and-macro

Figure 1.3: datareportal.com/reports/digital-2021-global-overview-report

Sprint logo: en.wikipedia.org/wiki/File:Sprint_Corporation_Logo.svg

02

IMPORTANCE OF THE CUSTOMER

In this chapter you will learn:

- Conceptual tools for understanding your customer
- Key concepts for thinking about your target audience
- Some behavioural economic theories
- How digital has affected customer behaviour
- About customer data.

2.1 INTRODUCTION

Although marketing is a business function, it is primarily an exercise in applied human psychology. The role of marketing is to address customer needs and provide value. In either case, success requires a nuanced understanding of how people think, process, and choose within their environment.

To achieve this, one must strike a balance between awareness of global shifts and how these impact people's behaviour and the fiercely intimate motivations that determine how and where individuals spend their time and money. This chapter outlines an approach for understanding customer behaviour, and introduces some conceptual tools used to frame and focus how you apply that understanding to your marketing efforts.

2.2 KEY TERMS AND CONCEPTS

Table 2.1

Term	Description
Attention economy	The idea that human attention is a scarce commodity, i.e., seeing attention as a limited resource.
Customer experience map	A visual representation from the beginning to the end of the purchase experience from the customers' perspective, including their needs, wants, expectations, and overall experience.
Customer persona	A detailed description of a fictional person to help a brand visualise a segment of its target market.
Global citizen	A person who identifies as part of a world community and works toward building the values and practices of that community.
Tribe	A social group linked by a shared belief or interest.
Product	An item sold by a brand.
Story	A narrative that incorporates the feelings and facts created by your brand, intended to inspire an emotional reaction.

2.3 UNDERSTANDING CUSTOMER BEHAVIOUR

The study of consumer behaviour draws on many different disciplines, from psychology and economics to anthropology, sociology, and marketing. Understanding why people make the decisions they do forms part of a complex ongoing investigation.

Marketing and product design efforts increasingly focus on a customer-centric view. Rather than simply making people want stuff, successful organisations are focused on making stuff people want. Given the plethora of options, product or service attributes, pricing options, and payment choices available to the connected consumer today, competition is fierce. Only the most highly considered brands will succeed. To achieve this, brands need to offer customers value, and this relies on understanding consumer behaviour.

No point of engagement with your brand occurs in isolation for your customer. Their life events, social pressures, and motivations impact their experience with your brand. Something happened before and after they bought the product, and their experience with it does not start or end at the point of sale. It starts well before they purchase and continues long after the sale is completed.

For example, think about a specific type of cereal. A customer stands in front of the shelves at the supermarket to choose a box of cereal. Purchasing decisions start before the customer even steps foot into a store.

Before the purchase, the customer relies on a host of preconceived ideas and personal preferences and goals to make their decision, for example:

- Nostalgia: "I ate this cereal as a child."
- Brand loyalty: "My family has always eaten this brand."
- Visibility or interest: "I've heard about this cereal on social media."
- Goals: "I need to increase my fibre intake."
- Budget: "What can I afford?"
- Value: "Can I get a deal?" (For example, 150 g free or a hidden toy)
- Appeal and personal preference: "I don't like the flavour of bananas."

After the purchase, they will experience the product until it is finished. At this point, as they say, 'the proof of the pudding is in the tasting'. The customer will either re-purchase the product based on a positive or neutral experience, or they will not re-purchase the product based on a negative or neutral experience. Consider Figure 2.1 below.

Likelihood that customer will purchase again, or stay loyal to the brand

Unlikely

Likely

Positive   Neutral   Negative

Customer experience
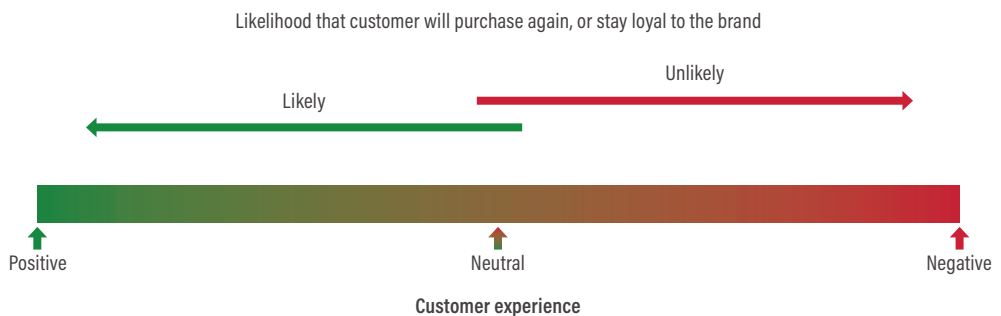
Figure 2.1 The consumer experience determines the probability of re-purchase

2.4 KEY DIGITAL CONCEPTS INFLUENCING CUSTOMER BEHAVIOUR

The pervasiveness of digital has changed the way that customers make purchasing decisions. For one thing, information is constantly at their fingertips and available to them. Whereas customers would perhaps see a new product in a magazine ad or hear about it on the radio, they are now bombarded with targeted ads, banner ads, and more, whenever they open their browsers or inboxes. Whereas 'word of mouth' used to refer to a person's friends, family, or neighbours, it may now refer to the people they follow on social media — and they may not even know these people personally.

This is, however, not to say that the customer is a passive recipient of this information and content. Digital tools, such as the internet and social media, enable customers in a way that they have not previously been empowered. They can research more widely, they have access to products and services that may not be available locally; and they have more recourse if the experience is not a positive one.

Marketers now have more power, too. By analysing customer data, they can improve customers' experiences and increase engagement rates and conversions. Access to this data is perhaps one of the most integral uses of digital to connect with customers and create more brand awareness and loyalty.

There are three main concepts that you should understand when considering customer behaviour:

1. The impact of digital, or digital disruption
2. Global citizenship and the idea of global 'tribe'
3. The attention economy.

2.4.1 The impact of digital

Digital disruption, which is discussed throughout this book, can appear in many small and large ways. If there's one thing the past 20 years have taught us, it's that there is constant disruption and upheaval in the digital world. How we communicate with one another, how we shop, how we consume entertainment, and how we see ourselves in the world, has all changed because of digital. And these changes are accelerating.

One of the results of digital tools and media is a destabilising of the status quo. All industries are vulnerable to change when a product or service comes along that meets user needs in an unprecedented way. Netflix has disrupted the media industry, airbnb has changed travel, and Uber has dramatically impacted what individuals can expect from transport options. At the core of their offerings is personalisation. Customers want to be treated as individuals, not as users, accounts, or prospects. Personalisation is a chance to use behaviour as the most important clue about what people want and more importantly, what they need (Godin, 2014).

NETFLIX Uber ⌂ airbnb

Figure 2.2 Netflix, Uber, and airbnb fundamentally changed the way that consumers watch television, travel short distances, and find accommodation

All three of these tools use customer data in some way to offer, improve, or price their services. Consider how Netflix recommends particular shows or movies based on previous viewing history. The catalogue is too vast for people to be able to find what they will enjoy without assistance. Therefore, an algorithm has been developed to push relevant content to the fore, making it easier to access; ultimately, the user experience is less frustrating and disappointing. Uber uses data to either reduce or increase ride prices based on demand in a particular area, and at a certain time.

Take into account that people born after 1985, more than half the world's population, have no idea what a world without the internet is like. They only know a rapid pace of advancement and some tools that serve them better than others.

The internet seeks no middlemen. Established industries or organisations can be bypassed completely when people are in control. Your customers can find another option with one click, and are increasingly impatient. They are not concerned with the complexity of technical aspects of how the site functions; they are simply interested in the fact that it does. People will use the service that best serves them, not what best serves an industry or existing regulations.

2.4.2 The global citizens and their tribe

Coupled with these empowered digital consumers, who are changing digital and driving disruption as much as digital is changing them, is the contradiction evident in the relationship between a global citizen and increasingly fragmented and differentiated tribes built around interests. National identity, given global migration and connectivity, has shifted as the world becomes smaller. The internet has created space for people to create, form, support, and evolve their own niche communities. This duality forces marketers to keep cognisant of international shifts while tracking and focusing on niche communities and specific segments within their market. It is important to remember that tribes are fickle and nomadic; you need to feed their passions and beliefs.

Figure 2.3 offers a simplified view of parenting communities and how global trends filter down, from a global community to a more personal, local level.

NOTE

Internet users are moving from sharing as a method of broadcasting themselves, into a way of sharing that has community at heart. Online communities encourage connection around common interest, are more trusted, and give participants a sense of belonging in the digital world.

Local communities
Parent support groups, local social media influencers/
communities, friends and family, healthcare professionals,
schools, teachers, etc.

Wider community of like-minded parents
Influencers on social media, internet message boards, etc.

Global shift to 'conscious parenting'
International media, books, podcasts, magazine, and internet
articles (coupled with more general global trends, events
and research, for example, psychiatric studies into how early
parenting/familial relations can impact people into adulthood).

Figure 2.3 How global trends filter down to local communities

2.4.3 The attention economy

Attention is a resource — a person only has so much of it.

(Matthew Crawford)

The attention economy describes attention as a scarce resource, and considers the ways
that it can be captured and retained long enough for information to be absorbed, or for a
customer to make a purchasing decision. Media forms and the mediums through which they
can be consumed have exploded over the last decade, and it's increasingly difficult to get the
attention of those you are trying to reach. Your customer is distracted and has many different
things competing for their attention.

If a customer is not interested, they will quickly disengage. Likewise, if they feel that something
is not relevant to them, they will turn their attention to something else.

2.5 TOOLS FOR UNDERSTANDING YOUR CUSTOMER

Despite the complexity of the customer landscape, various tools and frameworks are available
to consider your customer. The goal with many of these is to inform your decision making and
help you think from the perspective of your customer.

2.5.1 Developing user personas

To understand all your customers, you must have an idea of who they are. While it's impossible to know everyone who engages with your brand, you can develop representative personas that help you focus on motivations rather than on stereotypes.

A user persona is a description of a brand-specific cluster of users who exhibit similar behavioural patterns in, for example, their purchasing decisions, use of technology or products, customer service preferences, and lifestyle choices. We will revisit the user persona at multiple points during this course, as it shouldn't be seen as an end in itself.

A user persona is a consensus-driving tool and a catalyst that can be applied when you try to understand your entire customer experience, or when you decide on the implementation of specific tactics. Every organisation should have four to five user personas to help strategists target their efforts.

To create a user persona and inform decisions with your customers' point of view, one must prioritise real information over your team's assumptions and gut feelings.

Desktop research, drawn from sources such as existing reports and benchmarking studies, help you to frame the questions you need to ask when delving deeper into the data available to you elsewhere through online platforms like

> **NOTE**
> Market research methodologies are explored in more detail in **Chapter 3: Market research**.

your website or social media presence. The internet provides an increasing number of viable alternatives to offline primary research.

A combination of habits and specific needs are combined into a usable overall picture. A key feature of the user persona below is how it accounts for customer motivation. Summer is driven by emotion, rich storytelling, and social belonging. This knowledge should drive how the brand communicates with her and how her brand experience is tailored to make her feel like part of a community.

Figure 2.4 User personas are a consensus-driving tool

To build a robust user persona, you should consider the demographics, psychographics, and motivators for your customers.

Demographics and psychographics

Understanding customers can involve two facets:

1. Understanding the physical facts, context, and income of their 'outer world', i.e., their demographics. These include their culture, subcultures, class, and the class structures in which they operate, among other factors.
2. Understanding the motives, desires, fears, and other intangible characteristics of their 'inner world', i.e., their psychographics. Here we can consider their motives, how they learn, and their attitudes.

Both facets above are important, though some factors may be more or less prominent depending on the product or service in question. For example, a women's clothing retailer needs to consider gender and income, as well as feelings about fashion and trends equally, while a B2B company typically focuses on psychographic factors as their customers are linked by a job function, rather than shared demographics.

Demographics can be laborious to acquire but are generally objective and unambiguous data points that change within well-understood and measurable parameters. For example, people get older, incomes increase or decrease, people get married or have children. Data sources like censuses, surveys, customer registration forms, and social media accounts are just a few places where demographic data can be gathered, either in aggregate or individually.

Psychographics, however, are fluid, complex, and deeply personal because, after all, they relate to the human mind. On top of that, there are other elements to consider: those 'human traits', habits and thought processes that apply to all of us, but play out in unique ways. This information is very hard to define, but when complementary fields work together, it's possible for marketers to uncover a goldmine of insight.

2.5.2 Understanding motivation

People make hundreds of decisions every day and are rarely aware of all of the factors that they subconsciously consider in this process. That's because these factors are a complex web of personal motivating factors that can be intrinsic or extrinsic and positive or negative.

Positive

| If I do this, I'll get a reward | I want to do this to feel good |

Extrinsic — Intrinsic

| If I don't do this, I'll face a penalty | I need to do this or I'll feel bad |

Negative

Figure 2.5 Extrinsic and intrinsic motivators

Extrinsic motivators

Extrinsic factors are external, often tangible, pressures, rewards, threats, or incentives that motivate us to take action even if we don't necessarily want to. For example, a worker in a boring or stressful job may be motivated to keep going by their pay check, and drivers are motivated to obey traffic rules by the threat of getting a fine or hurting someone.

Marketing often uses extrinsic motivators to provide a tangible reward for taking a desired action. Some examples include:

- **Limited-time specials and discounts:** The customer is motivated by a perceived cost saving and the urgency of acting before the offer is revoked.
- **Scarcity:** The limited availability of a product or service is used to encourage immediate action.
- **Loyalty programmes:** They typically offer extrinsic rewards like coupons, exclusive access, or free gifts in exchange for people performing desired behaviours.
- **Ancillary benefits:** They can include things such as free parking at the shopping centre if you spend over a certain amount at a specific store.
- **Free content or downloads:** They can be obtained in exchange for contact details, often used for subsequent marketing activities.

Booking.com, for example, uses a range of extrinsic motivators to encourage customers to book quickly, including a price discount exclusive to their site and urgency through the use of the words "High demand", "Only three rooms left" and, "There are two other people looking at this hotel". All of these factors nudge the customer to book quickly to avoid missing out on what is framed as a limited-time opportunity.

Figure 2.6 A screenshot of Booking.com using extrinsic motivators

The problem with extrinsic motivation is that a customer can often perform the desired action to get the reward or avoid the threat without fully internalising the meaning or marketing message behind the gesture. Or worse, the required action becomes 'work', diminishing the enjoyment of the task and the reward.

Some people will, for example, swipe in at the gym with their membership card to avoid losing their access, but won't actually exercise. Some might log in to a website every day to accumulate points without actually looking at the specials on offer.

Kohn (1987) summarised the three risks of extrinsic rewards:

1. "First, rewards encourage people to focus narrowly on a task, to do it as quickly as possible and to take few risks.
2. Second, people come to see themselves as being controlled by the reward. They feel less autonomous, and this may interfere with performance.
3. Finally, extrinsic rewards can erode intrinsic interest. People who see themselves as working for money, approval or competitive success find their tasks less pleasurable, and therefore do not do them as well."

Intrinsic motivators

Somebody who is intrinsically motivated performs an action for an intangible benefit simply because they want to, or for the pleasure, fun, or happiness of it. Intrinsic motivators are much subtler and more difficult to quantify, but are also more powerful and longer-lasting drivers of human behaviour.

Some common forms of intrinsic motivation include:

*   **Love:** This includes not just romantic love, but also the love of an activity or outcome.
*   **Enjoyment and fun:** Few intrinsic motivators are as powerful as the desire to have a good time.
*   **Self-expression:** Some people act in a certain way because of what they feel the action says about them.
*   **Personal values:** Values instilled through cultural, religious, social, or other means can be powerful motivators.
*   **Achievement or competence:** When people challenge themselves, take a meaningful personal risk, or attain a long-desired goal, they are acting because of an intrinsic motivation.
*   **Negative intrinsic motivators:** Fear, embarrassment, and inertia are some powerful drivers that rely on negative emotions.

The following ad (Figure 2.7) combines multiple intrinsic motivators to drive home a message. It appeals to pet owners' love and sense of responsibility for their pets, as well as testing their competence as a 'good' pet owner. It also touches on negative motivators: fear for the pets' health and a sense of shame if they are not feeding their pets an appropriate diet.

Figure 2.7 This advert for a brand of dog food, reads "Stop treating your dog like a trashcan"

2.6 Finding the right motivators

Many brands develop elaborate marketing campaigns with gimmicks and rewards, but find that these fail. This is often because of a misunderstanding of the motivators that drive customers to take action in the first place. Marketers tend to overvalue how much people like, understand and care about brands, which can lead to a disconnection from the audience.

The most important factor to consider in choosing a customer motivator is relevance to the customer, to the brand, and to the campaign. Ask yourself, "Is the incentive you are offering truly relevant and useful?"

Most complex human actions involve a combination of factors. For example, we work because of the external pressure to earn money, and some also get an intrinsic reward in the form of achievement, self-expression, or making a difference in the world. Both factors are important, and if one is missing, the other needs to compensate strongly for this; i.e. interns working for free to get ahead quickly in their careers; people being paid more to stay in a difficult or unfulfilling job.

The success of your customer persona will depend on how carefully you interrogate assumptions about your customer, how carefully you draw on research, and how you prioritise understanding their motivations and the way decisions are made.

2.6.1 Knowing your customer

One tool to understand your customer is to examine a day in the life of (DILO) the customer. DILO is a useful marketing tool, because it can help you uncover certain motivations, triggers, stress points, and opportunities.

Consider a brand that is aimed at lower income families. Once you analyse this customer's DILO, you would realise that:

* You would need a mobile app or at least a mobile-friendly website, because the majority of lower income families do not have access to a PC or laptop
* Your app or website would need to have very low data demands
* Your campaigns would be aimed during the early mornings or early evenings, when people are likely to be commuting and, therefore, on their mobile devices
* Your campaigns would need to be very clear on pricing and value.

Can you recognise how, by understanding the customer's day, you can make better marketing decisions? Knowing your customer puts your product or service in their line of sight and allows you to save money and resources, while also maximising impact.

2.6.2 Decision making and behavioural economics

One significant shift in understanding customers over the past few years has come from the fields of psychology and economics. This area of inquiry, behavioural economics, looks at what assumptions or behaviours drive decision making. An understanding of individual motivations and interactions between customers and your brand can help you cater to what your market really wants or needs.

As an example, industrial designer Yogita Agrawal designed an innovative and much-needed human-powered light for people in rural India. Although the product ingeniously took advantage of the locals' mobile lifestyle – the battery is charged through the action of walking – and the idea was well received, initially no one actually used the product. Agrawal eventually discovered the simple reason for this: the device had a plain, ugly casing that did not match with the vibrant and colourful local dress at all. When she added a colourful and personalisable covering to the device, usage shot up dramatically. Although she had found the big insight, that walking can generate energy to power lights in areas not served by the electrical grid, it took a further understanding of regional preferences to truly make the device appealing.

If marketers can apply this insight to their strategies and campaigns, it means that they may be able to get more customers to take desired actions more often, for less cost and effort. This is the ideal scenario for any business.

Biases

Cognitive biases

Cognitive biases are our own personal prejudices and preferences, as well as common ways of thinking that are inherently flawed. A classic example is confirmation bias, where we take note of information that confirms our beliefs or worldview, but discount or ignore information that doesn't.

Try it for yourself! The next time you are driving or commuting, pay attention to all the red cars on the road. Does it begin to seem like there are more red cars than usual?

Below are some of the most important biases that marketers should be aware of (Taylor, 2013).

Table 2.2 Biases that marketers should be aware of

Category	Bias	Elaboration
Information	Knee-jerk bias	Making a quick decision in a circumstance where slower, more precise decision making is needed.
	Occam's razor	Comparing two competing ideas, the simplest one is usually preferable or true.
	Silo effect	Using a narrow approach to form a decision.
	Confirmation bias	Only focusing on the information that confirms your beliefs (and ignoring disconfirming information).
	Inertia bias	Thinking and acting in a way that is familiar or comfortable.
	Myopia bias	Interpreting the world around you in a way that is purely based on your own experiences and beliefs.
Ego	Loss aversion bias	Tending to favour choices that avoid losses, at the risk of potential gains.
	Shock-and-awe bias	Believing that our own intelligence is all we need to make a difficult decision.
	Overconfidence effect	Having too much confidence in our own beliefs, knowledge, and abilities.
	Optimism bias	Being overly optimistic and underestimating negative outcomes.
	Force field bias	Making decisions that will aid in reducing perceived fear or threats.
	Planning fallacy	Incorrectly judging the time and costs involved in completing a task.

Pricing biases

There is also a lot of bias around the price of an item. Generally, we perceive more expensive to be better, and we can actually derive more psychological pleasure from them, even if the cheaper alternative is objectively just as good.

A classic example of this is wine-tasting, where in repeated experiments participants agree that the more expensive wine tastes better where, in fact, all the wines were identical. Taken even further, researchers discovered that people tasting the more expensive wines actually had a

heightened pleasure response in their brains, showing that researchers could generate more enjoyment simply by telling participants they were drinking an expensive wine (Ward, 2015).

Loss aversion

One of the most powerful psychological effects is the feeling of loss, when something we possess is diminished or taken away. The negative feeling associated with loss is far stronger than the positive feeling of gaining the equivalent thing. In other words, we feel the pain of losing R500 more acutely than the joy of gaining R500.

Marketers can use loss aversion very effectively in the way they frame and execute marketing campaigns. Here is an example: Consider giving a customer a free trial version of a service for a long period. This then becomes so useful and important to them that they would rather pay to avoid losing it. On-demand TV service Netflix, uses this to great effect with its 30-day free trial, especially since they ask for credit card details upfront so that shifting over to the paid version is seamless.

Heuristics

A heuristic is essentially a decision-making shortcut or mental model that helps us to make sense of a difficult decision-making process, or to estimate an answer to a complex problem.

Some classic examples include:

- **The availability heuristic:** We overemphasise the likelihood or frequency of things that have occurred recently because they come to mind more easily.
- **The representativeness heuristic:** We consider a sample to represent the whole for example, in cultural stereotypes.
- **The price-quality heuristic:** We consider more expensive things to be better quality. A higher price leads to a higher expectation, so this can work both to the advantage and disadvantage of marketers. For products where quality is measurable and linear, the price needs to correlate, and a higher price needs to be justified tangibly. For products or services where quality is less tangible or more subjective, such as food, drinks, experiences and education, in many ways the price can *heighten* the perceived quality and experience even on a neurological level.
- **Anchoring and adjustment heuristic:** We make decisions based on relative and recent information rather than broad, objective fact. In marketing, this can be used to steer customers to the package or offer that the brand most wants them to take.

Choice

Choice in its simplest form, is the ability to make a decision when you have two or more possibilities. How do people choose? This is a difficult question to answer because people decide based on irrational, personal factors and motivators, objective needs, and their immediate circumstances.

Word of mouth or peer suggestions

We are very susceptible to the opinions of other people and tend to trust the opinions of friends, family, trusted experts, and 'people like us' over companies or brands. We are also much more likely to join in on an activity like buying a specific product if we see others like us doing it first. This is the notion of social proof. Human beings generally rely on early adopters to lead the way, with the vast majority waiting for a new product or service to be tested before jumping on board.

This is why many brands use spokespeople or testimonials. They act as a reassurance to the potential customer that other normal people actually experience the benefits that are promised. This also highlights the importance of positive online word of mouth. The Zero Moment of Truth (ZMOT) is the moment that occurs after the customer has been exposed to your brand, but before a purchase is made. People do extensive research online before important purchases and can have their minds swayed by the reviews, experiences, and opinions of others who are often strangers.

Consider the rise of #BookTok, a subcommunity on the social media platform TikTok, which focuses on book reviews and recommendations. Globally, publishers are seeing tangible results and an uptick in sales directly related to #BookTok. Interestingly, backlist titles (in other words, books that are not new releases) are also seeing a rise in sales directly influenced by 'BookTokkers.' This is partly due to how quickly and easily accessible these reviews are. However, there is also a level of trust in the reviews, particularly if the review comes from one of the more popular accounts.

Personal preferences and history

Some of our decisions are based on very personal factors, such as a favourite colour, a positive past experience, or a historical or familial association. For example, some people may choose to buy the same brand of breakfast cereal that they remember eating as a child, regardless of the price or nutritional benefits. For them, the total experience and good feelings form part of the overall value they derive. This is why many brands place emphasis on their long and prestigious histories.

Habits

Habits form when we buy the same thing because we've always bought it, and it's simply the easiest option.

Habits are typically triggered by an outside or environmental factor (the cue), which then causes us to act out our habit (the action), after which we receive a positive boost (the reward). This sequence is referred to as the habit loop.

In marketing, the goal is to get a customer to form a habit loop around purchasing or using the brand's offering. For example, many snack brands try to associate the environmental cues of

hunger or boredom with their products, such as KitKat's "Have a break" or SNICKERS' "You're not you when you're hungry" campaigns.

Loyalty programmes can play a key role in helping customers solidify a habit. For example, given the choice of two similar coffee shops on the morning commute to work, a person may be more inclined to visit the one offering a free coffee once they've collected a card full of stamps (even if that means going out of their way or paying a bit more for what is essentially a small discount). Eventually, the routine becomes set and it becomes easier to stick to the safe, familiar option.

Below are some examples from brands that encourage habit formation.

Table 2.3 How brands capitalise on habits

Brand	Cue	Routine	Reward
Starbucks	Walking to work in the morning	Get my regular coffee order	A caffeine hit and a friendly interaction with the barista
Nike	Mobile app reminder to go for a run	Put on Nike shoes, go to the gym	Endorphins, satisfaction at living a healthy, aspirational lifestyle
Movie theatre	Smell of popcorn	Buy a snack set from the counter	Tasty snack, experiencing the 'full' movie-going experience

How do habits form? To create a habit, you need to perform a repeated action many times in a row. The harder the action, such as going for a jog each morning, the longer and more consistently you need to practice the behaviour. Once the habit sets, it becomes a mental 'shortcut' that will take conscious effort to override in future.

Decision load

Making decisions is difficult, even if the decision is a low-stakes, low-impact one. Generally, psychologists agree that we have a certain quota of decisions that we can make every day, after which subsequent decisions become harder and more taxing, and often result in poorer outcomes called 'decision fatigue'. This is why leading thinkers try to cut out as many trivial decisions as possible. Steve Jobs of Apple famously wore the same blue-jeans-and-black-turtleneck outfit every day to save himself making that one extra decision every morning.

This is also why we tend to subconsciously eliminate unnecessary decisions and stick to reliable, tested habits. This is especially true for the fast-moving consumer goods (FMCG) sector. Consider your habits when buying toothpaste. Typically, you will purchase the same brand you always do without really thinking about it. Unless you had a terrible experience with the product, one toothpaste seems as good as the other and there's no incentive to switch. You certainly won't pause for five minutes in front of the shelf each time to carefully study each option before making your decision. It doesn't matter enough to get the best one.

Now imagine that your usual brand is out of stock. Suddenly, instead of relying on the existing habit, you are forced to make the decision from scratch at which point marketing factors and price can play an important role. However, crucially, it is the experience that the new product delivers that will be the deciding factor. If the new toothpaste is similar or inferior to the usual brand, there's no incentive to change the buying habit.

Defaults

Providing a 'default option' can be a powerful decision-making shortcut, because it removes the need to make an active decision. Defaults work for a number of reasons.

- **They offer a path of least resistance:** The default setting is perceived to be the one that is good enough for most people, and requires the least amount of thought and customisation. This is ideal for reducing effort.
- **They serve as a social signal:** The default is seen as the socially approved option, as the presumption is that the majority will choose this, and there is safety in aligning with the majority.
- **They offer assurance:** Similarly, we also presume that the default choice has been selected by an expert because of its merit to the end user.
- **They take advantage of loss aversion:** When it comes to sales and marketing, effective default packages typically include more products or services that are strictly needed to increase the value and therefore the price. This is done simply because opting for a more basic version involves the customer taking elements away, and therefore suffering a loss. Once the default price has been anchored in the customer's mind, there is less incentive to remove unwanted elements, even if the price gets reduced. For example, when buying a new laptop, the customer may be offered a package deal that includes antivirus software, a laptop bag, a wireless mouse, and other related accessories.

Choice architecture

You can simplify your customers' decision-making processes by cleverly designing the choices you offer. This is called choice architecture.

While the following are guidelines only, they should be tested thoroughly based on your own individual context, brand, and customers. Generally speaking, a good choice architecture has the following characteristics:

- **A small number of choices:** Usually not more than five choices are offered, though ideally three. The smaller the number of options to choose from, the easier it is for the customer to distinguish the differences between the options and to avoid a feeling of missing out.
- **A recommended or default option:** Because people consider expert advice and social preferences when choosing, highlighting one option as 'the most popular choice' or 'our top-selling package' can direct people to the option you most want them to take.
- **A visual design hierarchy:** Typically use colour and size. To make your preferred option stand out, one easy trick is to make it bigger and brighter than the options around it.

Mixpanel strongly emphasises its business plan as the ideal choice, not only is it highly emphasised compared to the surrounding options, it includes a 'best value' assurance.
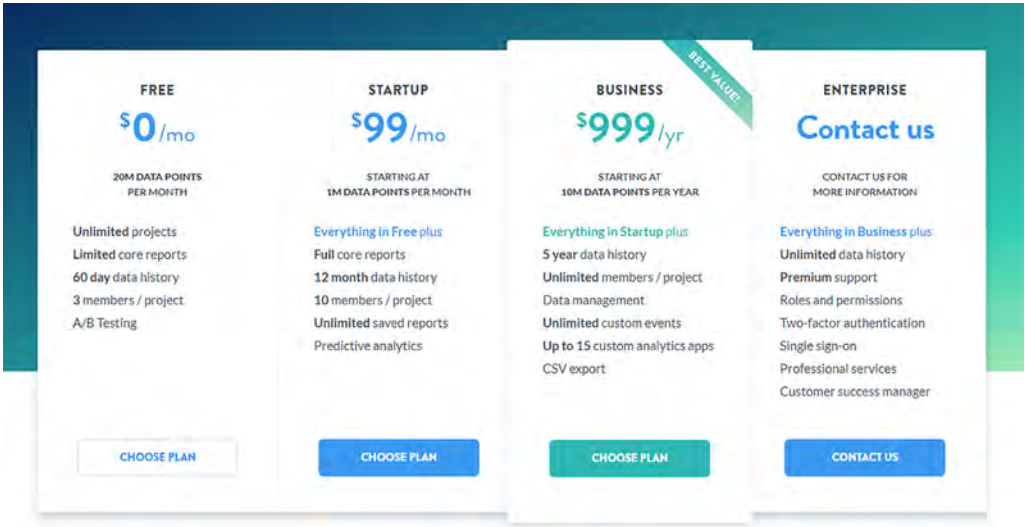
Figure 2.8 Mixpanel highlighting their business option as the ideal

2.6.4 Customer experience mapping

Once you have carefully crafted personas to guide you around who your customer groups are, you need to understand how and where they are engaging with your brand. This is where customer experience mapping comes into play.

> NOTE
>
> Customer experience mapping is a broad view of the customer's interaction with your product or service. A user experience map (primarily used in designing website or app functionality) focuses on that part of the user journey. You will learn more about this in **Chapter 6: User experience design**.

A customer experience map visually identifies and organises every encounter a customer has (or could have) with your company and brand. These interactions are commonly referred to as 'touchpoints' (Kramp 2011).

You can use it as a tool to map your entire customer experience or to drill down into detail for particular parts of that experience. Examples include in-store purchasing or someone trying to buy something on your website.

The customer experience map should detail how customers are feeling at various points in their interaction with you and also highlight any pain points that they may be experiencing. Identifying these problems or dips in their experience presents opportunities for engagement and also helps to explain your customer behaviour in context.

Towards creating your map
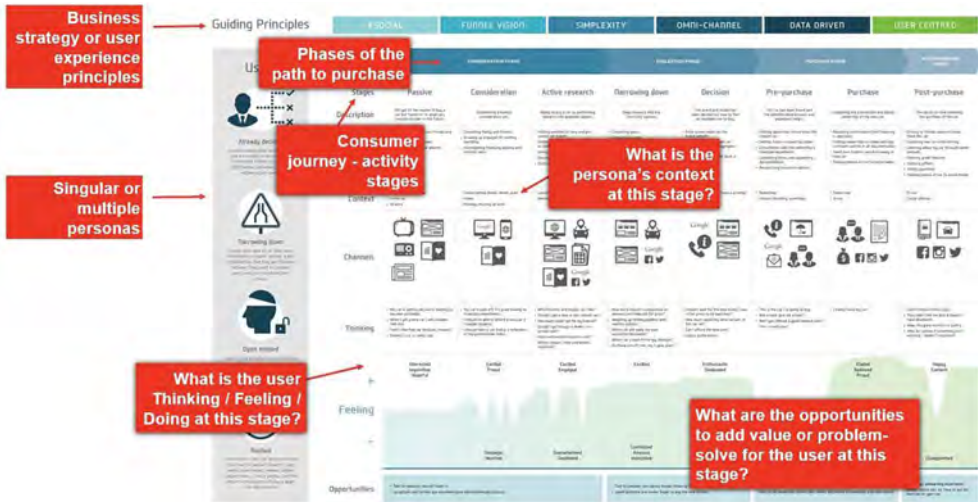
Figure 2.9 An experience map highlights opportunities
for improving your customer experience

Customer experience maps should vary from business to business, so one shouldn't just follow a blueprint. Evaluate the customer journey from consideration through to purchase and hopefully, loyalty. The experience map looks at the progression from consideration through to post purchase in great detail and visually synthesises your customer's behaviour and motivations at every point of contact with your brand. Look at the example above, which includes some key sections:

- **Phase:** Where is your customer in their interaction with your brand?
- **Doing, thinking, feeling:** How does what they are feeling and doing vary from stage to stage?
- **Channels:** What channels or contact points are involved in facilitating this stage of their journey?
- **Opportunities:** What opportunities exist to solve pain points for your brand?

2.6.5 Customer data

Digital marketing offers marketers a unique opportunity for timely and useful data collection, particularly about customers. Collecting the data, however, is one thing. The way to really make it worth your time is to analyse and learn from it, either to inform a marketing campaign or future product development.

> **NOTE**
> Once again, the importance of data is emphasised. This is arguably the most critical takeaway from a course in eMarketing: marketing decisions can and should be made using real and up-to-date data.
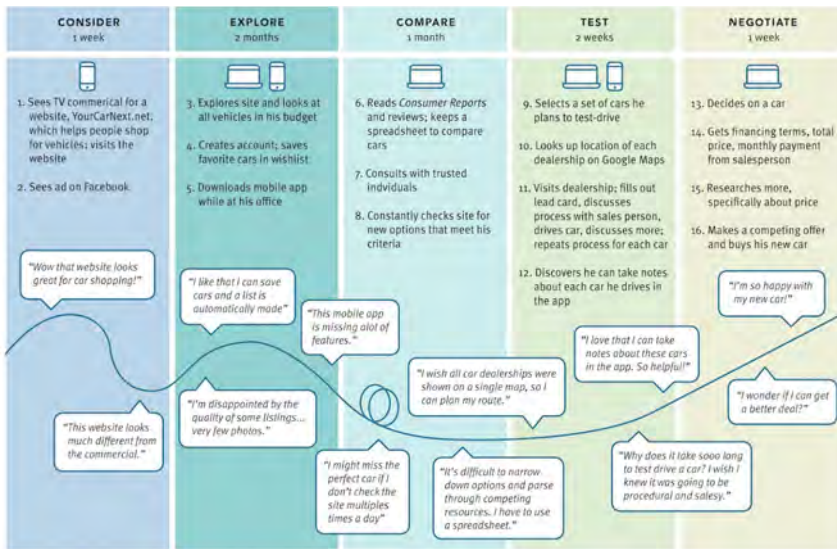
Figure 2.10 A customer experience map of buying a car

There are five basic steps to data collection.

1. **Establish the goal:** Decide what data you are collecting and why you are doing it.
2. **Impose a timeframe:** Data collection should have a set timeframe.
3. **Pick a data collection method:** Choose how you will collect data based on your goals and set timeframe.
4. **Collect the data:** You can do this via surveys, online tracking, transactional data tracking, online marketing analysis, and collecting subscription data.
5. **Analyse and learn from the data collected:** This is the most crucial part of this exercise. There is no use collecting data if you are not going to use it.

2.7 MEASURING SUCCESS

The ultimate test of how well you understand your customers is evident in the success of your product or service. Targeted and relevant communication about a well-positioned project can drive sales.

Data on the success of your campaigns, from social media analytics through to site visits and customer service feedback, should both act as measures of success and feed into course

> **NOTE**
> You will learn more about this in
> **Chapter 20: Tracking and analysis.**

correcting your marketing efforts or, where applicable, the nature of your actual product or service.

Every measure and data source discussed throughout the rest of this book should feed into your evolving picture of your customer. Personas and customer experience maps should be living documents and tools.

2.8 CASE STUDY: CHECKERS SIXTY60

Checkers is a FMCG retailer founded in 1956.

One-line summary

As part of their 'strategy to grow and monetise its ecosystem of value for customers,' South African grocery retailer, Checkers, followed global trends towards on-demand, 'quick commerce' grocery delivery services, and are now local market leaders with over 1.5 million app downloads.

The problem

Checkers, a major grocery retailer in South Africa, observed a global trend towards on-demand grocery services. Other grocery retailers, such as Woolworths Food and Pick n Pay, were offering grocery delivery but customers had to pre-book delivery slots with turnaround times of more than 12 to 24 hours, and the ordering mechanisms were clunky and inefficient.

The solution

Checkers went in a completely different direction, choosing to focus on a more convenient ordering and delivery process for the customer.

Shop in 60 seconds!
Conveniently grouped products make it faster to shop.

Delivered in 60 minutes
Save time, stay safe and shop from the comfort of your home.

Checkers' famously low prices
Delivered to your door for only R35.
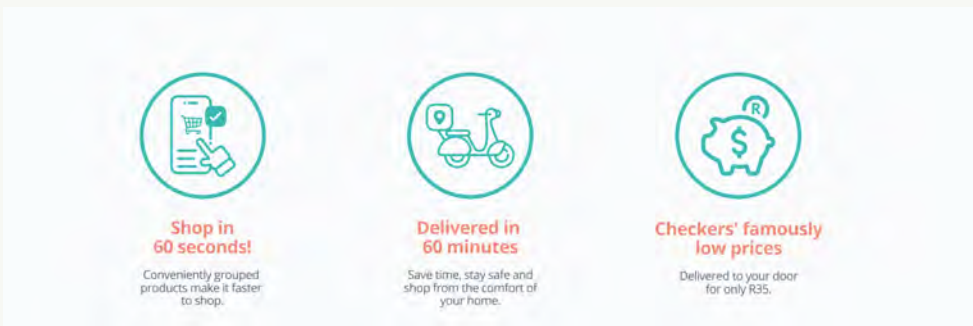
Figure 2.11 Ordering and delivery made easy

1. They launched a simple and easy-to-use app-based service called Checkers Sixty60.
2. They reinforced their market position as a quality, high-value, affordable grocer.
3. They localised ordering and delivery. Customers share their location so that the app can find the closest store to them. This means that customers' orders can be delivered faster due to proximity.
4. They employed their own delivery personnel (rather than relying on a logistics company), most of whom use branded motorcycles and can therefore move around towns and cities more easily.

5. They limited the number of items allowed to 30, which means that turnaround/delivery times can be within 60 minutes and that people order more often.

The results

Launched months before lockdown was enforced in South Africa due to the COVID-19 pandemic, Checkers Sixty60 has the lead on other retailers who launched later (for example, Woolies Dash and Pick n Pay Asap!). The service was very popular during 2020 but has continued to grow even as lockdown restrictions were lifted. This is as a result of the value that customers derive from the service, as well as the positive experiences before, during, and after ordering, live shopping (where customers can make replacement decisions in the app if a product is unavailable), and delivery (where customers can track the driver to their door).

Figure 2.12 Exponential growth of Sixty60 over a year

To further appeal to customers, the brand has also adopted an eco-friendly approach, offering a recycling service. The driver will collect the brown bags from a previous delivery when delivering the latest order.

(Source: BUSINESSTECH, 2021)

2.9 CASE STUDY QUESTIONS

1. List some intrinsic and extrinsic motivators that contributed to the success of Checkers Sixty60.
2. What kind of data is important for the continued success of the service? How would this be collected?
3. What can you learn from the launch of Checkers Sixty60 from a branding perspective, but also from the perspective of paying attention to global trends?

2.10 THE BIGGER PICTURE

Customers are autonomous beings, who make decisions every day – what to wear, what to eat, how to travel to work, what to use on their bodies, faces, and hair, what to feed their children and pets, the list goes on and on. In a maelstrom of information, you need to make your product and service stand out. This requires knowing your customer intimately, and you can only learn about your customers by taking the time to get to know them. With this knowledge, you can recommend a product to fit their needs or desires; or you can craft a product or service to fit into their lifestyles; or, even more ambitiously, you can tell them and show them what they never knew they wanted. Always put your customer front and centre. Do not get so bogged down by your own concepts and preconceived ideas that you forget that they are the people you are targeting and creating content and products for.

2.11 SUMMARY

People have come to depend on and shape the digital channels that enable connection, individual interest, and the disruption of industries. Your consumers are connected, impatient, fickle, and driven by a number of motivations and contextual realities. Only through targeting and understanding specifically can you reach them and ensure the success of your brand.

Some tools can help you paint a picture of your customers and their experience of your brand by depicting complex motivations, both external and internal. These tools enable real customer data and research, that consider the complex and sometimes irrational influences on how people make decisions. Customer personas, customer experience maps, and the field of behavioural economics can all help to shape your thinking and drive your approach.

2.12 CHAPTER QUESTIONS

1. What is behavioural economics?
2. What traps should you avoid when developing a consumer persona?
3. What is the relationship between a consumer experience map that depicts your customers' entire journey and an experience map used in the user experience design discipline?

2.13 FURTHER READING

Bendle, N.T., Farris, P.W., Pfeifer, P.E., Reibstein, D.J., 2017. *Key Marketing Metrics: The 50+ metrics every manager needs to know* (2nd edition). Pearson Education Limited: UK.

Eisenberg, B. and Eisenberg, J., 2006. *Waiting for Your Cat to Bark? Persuading Customers When They Ignore Marketing*. Thomas Nelson Publishers: USA.

www.slideshare.net/philipdemeulemeester/behavioural-economics-in – This presentation offers a good summary of the key topics and ideas within behavioural economics.

2.14 REFERENCES

BUSINESSTECH, 2021. Checkers is building something quite remarkable – and far bigger than its competitors. [Online]
Available at: businesstech.co.za/news/technology/518878/checkers-is-building-something-quite-remarkable-and-far-bigger-than-its-competitors
[Accessed 22 May 2022]

Chernets, N., 2021. How to Collect Digital Marketing Data in 5 Easy Steps. [Online]
Available at: www.entrepreneur.com/article/386543
[Accessed 11 February 2022]

Culoso, A. & Kalhorn, K., 2021. The Next Literary Frontier: The Rise of BookTok. [Online]
Available at: thehoya.com/the-next-literary-frontier-the-rise-of-booktok/
[Accessed 9 February 2022]

Eisenberg, B. and Eisenberg, J., 2006. *Waiting for Your Cat to Bark? Persuading Customers When They Ignore Marketing*. Thomas Nelson Publishers: USA.

Godin, S., 2014. ...different people differently. [Online]
Available at: seths.blog/2014/01/different-people-differently/
[Accessed 22 May 2022]

Gouillart, F. & Sturdivant, F.D., 1994. Spend a Day in the Life of Your Customers. [Online]
Available at: hbr.org/1994/01/spend-a-day-in-the-life-of-your-customers
[Accessed 7 February 2022]

Juarez, A., 2021. The Last Thing You Need to Read about Book TikTok. [Online]
Available at: electricliterature.com/the-last-thing-you-need-to-read-about-book-tiktok/
[Accessed 9 February 2022]

Kohn, A., 1993. *Punished by rewards*. Houghton Miffin Company, New York, New York.

Taylor, J., 2013. *Psychology Today*, 2013. Cognitive Biases Are Bad for Business. [Online]
Available at: www.psychologytoday.com/blog/the-power-prime/201305/cognitive-biases-are-bad-business
[Accessed 10 March 2022]

Risdon, C., 2011. The Anatomy of an Experience Map. [Online]
Available at: articles.uie.com/experience_map/
[Accessed 9 March 2017]

Ward, V., 2015. *The Telegraph*: People rate wine better if they are told it is expensive. [Online]
Available at: www.telegraph.co.uk/news/shopping-and-consumer-news/11574362/People-rate-wine-better-if-they-are-told-it-is-expensive.html
[Accessed 31 August 2017]

2.15 FIGURE ACKNOWLEDGEMENTS

Figure 2.4: Profile with permission from Mirum, 2017. Image of person, Pixabay, 2018

Figure 2.6: Screenshot of www.booking.com

Figure 2.7: theultralinx.com/2014/07/40-striking-print-adverts

Figure 2.8: Screenshot, Mixpanel, 2017

Figure 2.9: Used with permission from Mirum, 2017

Figure 2.10: www.nngroup.com/articles/analyze-customer-journey-map/

Figure 2.11: www.sixty60.co.za

Figure 2.12: businesstech.co.za/news/technology/518878/checkers-is-building-something-quite-remarkable-and-far-bigger-than-its-competitors

Sixty60 logo: www.sixty60.co.za

03

MARKET RESEARCH

In this chapter, you will learn:

- About key concepts in conducting market research
- About several methods for conducting online research, including surveys, online focus groups, and data sentiment analysis
- About possible problems and pitfalls to look out for when researching online
- How to describe the design thinking process
- How to explain why design thinking is important
- When design thinking is useful
- How data is used to improve the user experience and increase conversions
- How knowing your customers is integral to improving their experience with your brand.

3.1 INTRODUCTION

The internet is built for research. Whether it's a consumer shopping around for prices, a researcher exploring a topic, or a fan looking up their favourite band, the internet provides new ways for gathering and analysing data.

Customers are able to research companies and products easily, gathering information to compare prices and services with a few clicks. Customers can also share likes and dislikes easily, with both companies and friends.

As a result, brands can study who their customers are, what they are interested in, how they feel about the brand, and the best times and places to engage with them. Insights can be gathered from ongoing market research, making it possible to course correct and apply data-driven decision making. This chapter will focus on tools and methodologies for gathering useful data.

3.2 KEY TERMS AND CONCEPTS

Table 3.1

Term	Description
Bounce rate	The number of people who view one page and then leave a website without viewing any other pages. Data statistics and facts collected for analysis.
Data sentiment analysis	The systematic analysis of subjective materials, such as survey responses or social media posts, in order to determine the attitude and intended emotional communication of the customer.
Focus group	A form of qualitative research where people are asked questions in an interactive group setting. From a marketing perspective, it is an important tool for acquiring feedback on new products and various topics.
Hypothesis	A supposition that is tested in relation to known facts; a proposition based on reason but not necessarily assumed to be true.
Listening lab	A testing environment where the researcher observes how a customer uses a website or product.
Observation/ online ethnography	When researchers immerse themselves in a particular environment in order to gather insights.
Primary research	The collection of data to present a new set of findings from original research.

Qualitative data	Data that can be observed but not measured. Deals with descriptions.
Quantitative data	Data that can be measured or defined. Deals with numbers.
Research community	A community set up with the intention of being a source for research.
Research methodology	Methods employed in research to reach results.
Sample size	The number of respondents in a sample of the population.
Secondary research	The collection of existing research data.
Sentiment	The emotion attached to a particular mention, which is positive, negative, or neutral.
Statistically significant	A sample that is big enough to represent valid conclusions.

3.3 THE IMPORTANCE OF MARKET RESEARCH

The modern world can feel unpredictable. It is increasingly difficult to keep up with trends, customer needs, popular opinions, and competitors. So, how can you keep your brand and products relevant to ensure you are meeting your customers' needs?

The answer is to conduct market research. Market research helps you make informed business decisions. It involves systematically gathering, recording, and analysing data about customers, competitors, and the market, and turning this data into insight that can drive marketing strategies, product design and positioning, and communications strategies.

Online market research is the process of using digital tools, data, and connections to glean valuable insights about a brand's target audience. In other words, it's the process of learning about your audience by engaging and observing them online. Technology plays a key role in gathering data and connecting with research participants, and can make the whole process quicker and easier to manage than traditional offline research methods.

Traditional and online market research have the same goals and underlying principles, but online market research has the benefit of using digital technology, which provides a range of benefits:

- The internet is always on, meaning that data is readily available at any time.
- Many of the processes for finding, gathering, and storing data can be automated. For example, you can get an automatic email alert if someone mentions your brand, or you can set up self-administered digital surveys.

- You have access to a large number of participants around the world at the click of a button.

A lot of the information you will use is already being automatically collected, such as web analytics and social media data. All you need to do is access it.

People are often happy to share their own research, insights, and methodologies online, so you can access this trove of resources to inform your own research.

Online market research can be much more cost effective and quicker to set up than traditional research techniques.

There are many reasons why you should conduct regular market research, such as:

- Gain insights into your consumers, including:
  - what customers want and need from your brand
  - what customers like and dislike about the brand
  - why customers buy the brand's products or services
  - why potential customers might choose your brand over another
  - why customers do or do not make repeat purchases
- Understand the changes in your industry and business
- Discover new market trends on which you can capitalise
- Find new potential sales avenues, customers, products, and more
- Identify and engage new audiences
- Allow customers to help steer your business.

If you are able to understand your customers and the greater business context, you will be able to market more effectively, meet their needs better, and drive more positive sentiment around your brand. All of this adds up to happier customers and, ultimately, a healthier bottom line.

3.4 DESIGN THINKING

Design thinking is a process that can be used by marketers to understand their users. By applying design thinking, they understand, define, and redefine assumptions and problems and create solutions for the market. The most important characteristic of design thinking is that it is non-linear and iterative.

Because this process forces marketers to understand their users' needs (and, in fact, broader needs), it results in ideas that can be prototyped and tested. This keeps the marketers close to the users and results in products and services that actually meet people's needs — not just what companies *think* people need.

The five stages of design thinking are: empathise, define, ideate, prototype, test.

Notice that there is emphasis on prototyping and testing, as well as empathising. This is important because it is what makes design thinking so useful. Instead of working apart from customers and putting a product or service in the market that falls short, this process allows for more granular market research and iterative design.

Empathise   Define   Ideate   Prototype   Test

Figure 3.1 The five stages of design thinking

Because this process is non-linear, it could look like this:

Empathise → Define → Ideate → Prototype → Test
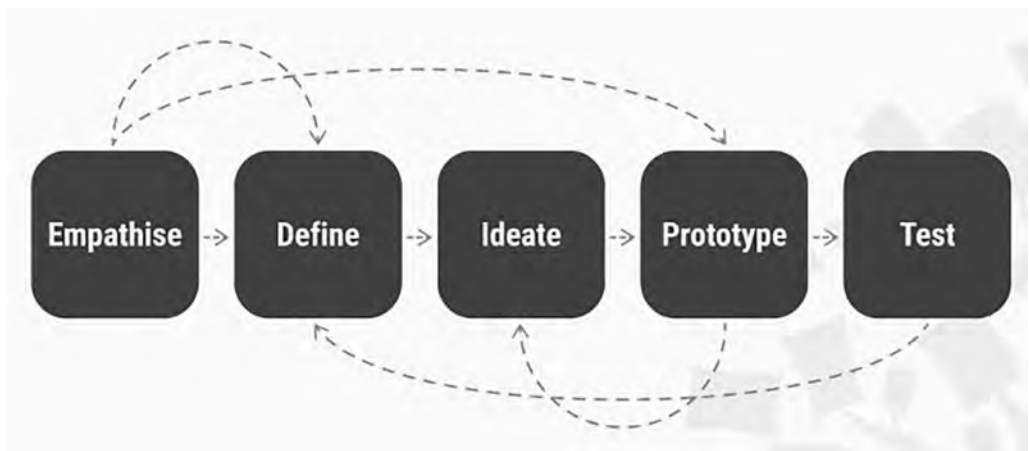
Figure 3.2 Design thinking requires re-thinking

3.5 KEY CONCEPTS IN MARKET RESEARCH

While the research field can be full of complex terminology, there are four key concepts to understand before conducting your own research:

1. Research methodology
2. Qualitative and quantitative data
3. Primary and secondary research
4. Sampling.

Let's consider each of these in turn.

3.5.1 Research methodology

Research methodology refers to the process implemented to conduct accurate and valuable analysis. The research process should involve the following steps:

Step 1
Establish the goals of the project

Step 2
Determine your sample

Step 3
Choose a data collection method

Step 4
Collect data

Step 5
Analyse the results

Step 6
Formulate conclusions and actionable insights (e.g., producing reports)
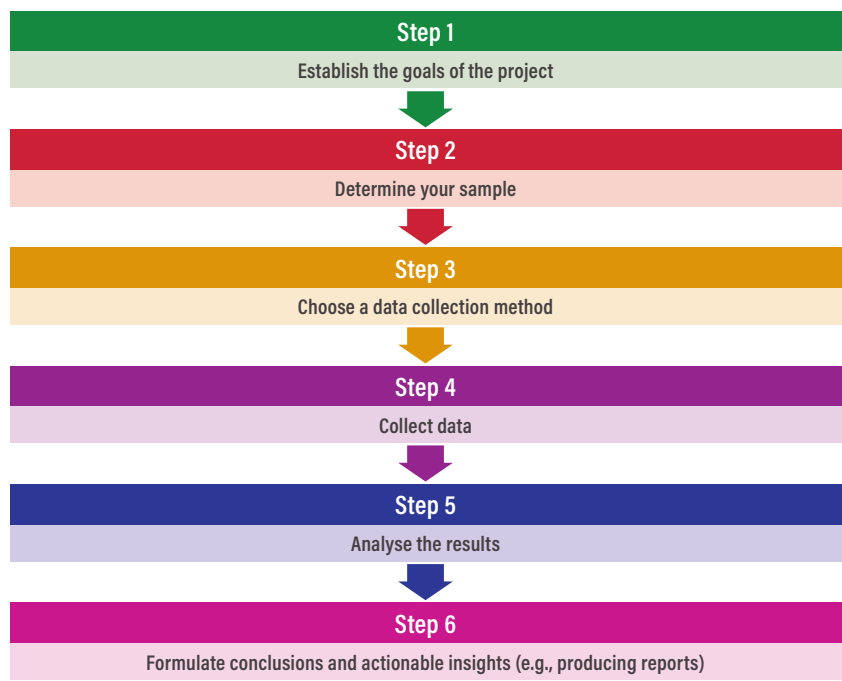
Figure 3.3 The steps in the research methodology process

Most often, market research focuses on specific issues unique to a business or brand. It is therefore not always possible to freely obtain comparable information to aid decision making. This is why it can be useful to start from a distinct research problem or hypothesis when kicking off such a project. Your question should guide your entire process, and will determine your choice of data collection method.

Another approach involves ongoing data collection. Unbiased decision making is far more accurately driven when aided by market insight. Many have argued that less expensive, ongoing data collection is increasingly a route proven to be useful to organisations.

3.5.2 Primary and secondary research

Research can be based on primary data or secondary data. Primary research is conducted when new data is gathered for a particular product or hypothesis. This is where information does not exist already or is not accessible, and therefore needs to be specifically collected from consumers or businesses. Surveys, focus groups, research panels, and research communities can all be used when conducting primary market research.

Secondary research uses existing, published data as a source of information. It can be more cost-effective than conducting primary research. The internet opens up a wealth of resources for conducting this research. The data could have originally been collected for solving problems other than the one at hand, so they may not be sufficiently specific. Secondary research can be useful for identifying problems to be investigated through primary research.

The internet is a useful tool when conducting both primary and secondary research. Not only are there a number of free tools available when it comes to calculating things such as sample size and confidence levels (see section **3.8 Tools of the trade** for some examples), but it is also an ideal medium to reach large numbers of people at a relatively low cost.

The internet and secondary research

Research based on secondary data should precede primary data research. It can be used in establishing the context and parameters for primary research. The data can provide enough information to solve the problem at hand, thereby negating the need for further investigation.

Secondary data can provide sources for hypotheses that can be explored through primary research. Sifting through secondary data is a necessary precursor for primary research, as it can provide information relevant to sample sizes and audience, for example. The data can be used as a reference base to measure the accuracy of primary research.

Companies with online properties have access to an abundance of web analytics data that are recorded digitally. These data can then be mined for insights. It's worth remembering, though, that it's usually impossible to access the web analytics data of competitors so this method will only provide information about your own customers.

Customer communications are also a source of data that can be used, particularly communications with the customer service department. Committed customers who complain, comment or compliment are providing information that can form the foundation for researching customer satisfaction.

Social networks, blogs, and other forms of social media have emerged as forums where consumers discuss their likes and dislikes. Customers can be particularly vocal about

> **NOTE**
> Consumer sentiment can be defined as an economic indicator that measures how optimistic consumers feel about their finances and the state of the economy. Consumers may be cash-strapped, but they still expect value for money, and convenience. Millenials, Generation Zs and Xs are also increasingly aware of the importance of sustainability and the environmental impact their shopping habits have.

companies and products. This data can, and should, be tracked and monitored to establish consumer sentiment. If a community is established for research purposes, the resulting feedback is considered primary data, but using social media to research existing sentiments is considered secondary research. The internet is an ideal starting point for conducting secondary research based on published data and with so much information out there, it can be a daunting task to find reliable resources.

The first point of call for online research is usually a search engine, such as google.com or yahoo.com. Search engines have an array of advanced features, which can aid online research. For example, Google offers:

- Advanced search: google.co.za/advanced_search?hl=en
- Google Scholar: scholar.google.co.za/schhp?hl=en
- Google Book Search: google.co.za/books?hl=en
- Google News Archive: news.google.com/newspapers

Many research publications are available online, some for free and some at a cost. Top research companies now feature analyst blogs, which provide some industry data and analysis free of charge.

Some notable resources are:

- econsultancy.com
- experian.com/hitwise
- pewinternet.org (US data)
- nielsen.com

The internet and primary research

Primary research involves gathering data for a specific research task. It is based on data that has not been gathered beforehand. Primary research can be either qualitative or quantitative.

Primary research can be used to explore a market and can help to develop the hypotheses or research questions that must be answered through further research.

Generally, qualitative data is gathered at this stage. For example, online research communities can be used to identify consumer needs that are not being met and to brainstorm possible solutions. Further quantitative research can investigate what proportion of consumers share these problems and which potential solutions best meet those needs.

3.5.3 Quantitative and qualitative data

Data can be classified as qualitative or quantitative. Qualitative research is exploratory and seeks to find out what potential consumers think and feel about a given subject. Qualitative research aids in identifying potential hypotheses, whereas quantitative research puts hard numbers behind these hypotheses. Quantitative research relies on numerical data to demonstrate statistically significant outcomes. Quantitative data can be counted, or measured and can tell you how many, how much, and how often.

> **NOTE**
> With larger sample sizes, qualitative data can be analysed quantitatively.

The internet can be used to gather both qualitative and quantitative data. In fact, the communities on the web can be viewed as large focus groups, regularly and willingly sharing their opinions about products, markets, and companies.

In robust research studies, both qualitative and quantitative research can be applied at different stages of the study.

The main differences between quantitative and qualitative research are represented in Table 3.2 below.

Table 3.2 Differences between quantitative and qualitative data

	Quantitative	Qualitative
Data gathered	Numbers, figures, statistics, objective data	Opinions, feelings, motivations, subjective data
Questions answered	What?	Why?
Group size	Large	Small
Data sources	Surveys, web analytics data	Focus groups, social media
Purpose	Tests known issues or hypotheses Seeks consensus, the norm Generalises data	Generates ideas and concepts – leads to issues or hypotheses being tested Seeks complexity Puts data in context
Advantages	Statistically reliable results to determine if one option is better than the alternatives	Looks at the context of issues and aims to understand perspectives
Challenges	Issues can be measured only if they are known prior to starting Sample size must be sufficient for predicting the population	Shouldn't be used to evaluate pre-existing ideas Results are not predictors of the population

Both quantitative and qualitative research can be conducted online.

Web analytics packages are a prime source of data. Using data, such as search terms, referral URLs, and internal search data can lead to qualitative information about the consumers visiting a website. However, when data is measurable and specific, such as impressions and clickthrough rates, it leads to quantitative research.

3.5.4 Sampling

Qualitative research is usually conducted with a small number of respondents in order to explore and generate ideas and concepts. Quantitative research demands far larger numbers, enough to predict how the total population would respond.

You should ensure the sample is representative of the population you are targeting as a whole. If your business transacts both online and offline, be aware that using only online channels for market research might not accurately represent your target market. However, if your business transacts only online, offline channels for your market research are less necessary.

Because quantitative research aims to produce predictors for the total population, sample size is very important. The sample size needs to be sufficient in order to make statistically accurate observations about the population.

For example, if your website has 4 000 registered users you don't need to survey all of them in order to understand how the entire population behaves. You need to survey only 351 users to get a sample size that gives you a 95% confidence level with a ±5% confidence interval. This means that you can be 95% sure your results are accurate within ±5%.

There are several sample size calculators mentioned in section **3.8: Tools of the trade**.

3.6 ONLINE RESEARCH METHODOLOGIES

There are many online market research methodologies. This chapter touches on three of the most popular and useful ones: surveys, online focus groups, and social media monitoring.

Which methodology should you choose?

That depends on a variety of factors, from your research question and purpose, to your budget and time. Here are some general pointers:

Surveys: Ideal for collecting large amounts of quantitative data and some qualitative data. They are quick and easy to set up and can run automatically.

Online focus groups: Ideal for engaging consumers and collecting qualitative data, such as opinions, ideas, and feelings about the brand. They require a larger time investment and a willing group of participants.

Online monitoring: Ideal for collecting qualitative data on brand sentiment, and can also provide some quantitative data around volume of interest in the brand. This data can be collected passively, and there are several tools that can automate this process.

3.6.1 Surveys

Surveys are questionnaires that contain a series of questions around a specific topic. Their purpose is to gather large volumes of quantitative data easily, though they can also collect some qualitative data.

Conducting surveys online allows for data to be captured immediately, and data analysis can be performed easily. By using email or the internet for conducting surveys, geographical limitations for collecting data can be overcome cost effectively.

Technology allows you to compile sophisticated and user-friendly surveys. For example, as opposed to indicating impressions on a sliding scale, respondents can indicate emotional response. The survey can also be tailored depending on previous answers, such as questions being skipped if they are not relevant to the respondent.

You can run ongoing online surveys at minimal cost. Simple polls can be used in forums and on blogs to generate regular feedback. Website satisfaction surveys are also an easy way to determine the effectiveness of a website or marketing campaign.

Surveys allow for instant feedback on questions or ideas from an existing community, such as a trusted group of thought leaders, your brand's social media fans, or a pre-created research community. Examples include Facebook polling apps and real-time mobile survey platforms.

Designing surveys

How you design a survey and its questions will directly impact your success. A survey can include any number and type of questions. More complicated questions should appear only once users are comfortable with the survey. Be careful that you do not introduce bias by asking leading questions.

Example:	
❌	✅
Do you agree that this conference venue is a world-class facility?	Rate your experience of our conference venue from 1 to 10.

In general, you will also find that you get more accurate answers when phrasing questions in the past tense than in the continuous tense.

Example:	
❌	✅
How many times a week do you buy take-away food?	In the past month, how many times did you buy take-away food?

Questions in the survey should be brief, easy to understand, unambiguous, and easy to answer. You can read more about survey questions here: hotjar.com/blog/survey-questions.

Figure 3.4 An example of an online survey with different question types

Types of survey questions

1. Open-ended

Open-ended questions allow respondents to answer in their own words. This usually results in qualitative data.

Example:

What features would you like to see on the website for the digital marketing textbook?
www.redandyellow.co.za/course/textbook/

Type your responses here:

---

2. Closed

Closed questions give respondents specific responses from which to choose. These are typically multiple-choice questions with either one or multiple possible answers. Broadly speaking, closed questions can be answered with a 'yes' or a 'no'. Alternatively, they can be selected from a very specific set of responses that have been provided. This results in quantitative data.

Example:

Do you use the digital marketing textbook website?	Yes	No

or:

What features of the digital marketing textbook website do you use? Tick all that apply.

Blog	
Case studies	
Free downloads	
Additional resources	

3. Ranked or ordinal

These types of questions ask respondents to rank items in order of preference or relevance. Respondents are given a numeric scale to indicate order. This results in quantitative data. Broadly speaking, closed questions can be answered with a 'yes' or a 'no'. Alternatively, they can be selected from a very specific set of responses that have been provided.

Example:

Rate the features of the digital marketing textbook website, where 1 is the most useful and 4 is the least useful.

	Blog
	Case studies
	Free downloads
	Additional resources

4. Matrix and rating

These types of questions can be used to quantify qualitative data. Respondents are asked to rank behaviour or attitude.

Example:

Rate the features of the digital marketing textbook website according to the following scale:

1 = love it, 2 = like it, 3 = no opinion, 4 = dislike it.

	Blog
	Case studies
	Free downloads
	Additional resources

3.6.2 Focus groups

Online focus groups involve respondents gathering online and reacting to a particular topic. Respondents can be sourced from all over the world and react in real time, arguably being freer with their responses since they can be anonymous in an electronic environment.

Online focus groups are ideal for having frank, detailed conversations with people who have an interest in your brand. This means they result in primary qualitative data. This information can then be used to create quantitative research questions.

Online focus groups can be conducted using a range of technologies. The simplest is to use a text-based messaging program or online forum. There are many options available. More sophisticated tools allow for voice or video conferencing, and can make it easier for the researcher to pick up clues from the respondent's voice and facial expressions. Some tools allow the researcher to share their desktop screen with respondents in order to illustrate a concept or question. Jamboard offers an interactive whiteboard feature, which can be very useful for brainstorming and for recording and grouping users' responses.

Zoom also offers opportunities to separate participants into breakout rooms, which can be useful for forming smaller focus groups before coming together as a plenary. Zoom breakout rooms allow you to split your Zoom meeting in up to 50 separate sessions.

NOTE

Zoom's popularity soared in 2020, due to the COVID-19 pandemic. As more and more people return to the physical workplace, it will be interesting to see what will stick and whether virtual meetings will remain commonplace. Read this article: **www.statista.com/chart/21906/zoom-revenue/**

Good options for conducting online focus groups include:

- Skype: skype.com/en
- GoToMeeting: goto.com/meeting
- Zoom: zoom.us
- Jamboard: jamboard.google.com

Focus groups are less formal than surveys, meaning the researcher will have specific questions to ask, but the conversation usually grows and develops organically as participants discuss their impressions. Usually running for between one and two hours, focus groups are used to get consumer views on:

- New products or marketing campaigns
- Existing products and campaigns and how they can be improved
- Sentiment around the brand
- Views on a brand's new direction or visual style
- Ideas for how the brand could improve its position or branding.

Online focus groups are excellent for collecting a lot of qualitative data quickly. When setting up the group, try to include enough participants to keep the conversation alive, but not too many so that some get drowned out by others (eight to ten is a good range). Also consider that you may run into technical troubles if people are connecting from different locations and internet connections. Be prepared to do some basic troubleshooting if this happens.

There are a number of different ways that you can recruit participants for an online focus group. This could include inviting people from your existing customer database, going through a traditional market research recruiting agent, or putting a call out on your website or social media communities. It is common practice to offer a small incentive to people who participate in a focus group, as it is a fairly time-intensive activity.

In-person focus groups are also an option, however, these are more time consuming and costly. The venue, catering, stationery requirements, and more will need to be considered. Aside from the logistics, you will need:

- At least one whiteboard
- Ample seating that is flexible and can be easily rearranged
- Large sheets of paper
- Post-its
- Markers.

In-person focus groups tend to be more lively and engaged than online groups. You will need to determine what suits your budget and needs.

3.6.3 Sentiment analysis

Finding out if people are talking about you is quite difficult in the offline world, but almost effortless online. Rather than having to conduct real-world surveys and interviews, in the digital world you can simply 'listen' to the conversation happening about you.

Keywords, the foundation to categorising and indexing the web, make it simple to track conversations taking place online. Customers don't always use channels designated by a company to talk about that organisation, but the good news is that the internet makes it easy for a company to identify and use the channels that customers have selected.

Online tools allow a company to track mentions of itself, its staff, its products, its industry and its competitors, or anything else that is relevant. This is called online monitoring, online listening, or data sentiment analysis. It involves using digital tools to find and tap into existing conversations. The tool then gathers and collates all the mentions it finds, so that you can analyse the data for insights.

Figure 3.5 A sentiment analysis report

Typically, searches include the following main focus areas:

- Company
- Brand name
- Key products
- Key personnel (names, job titles, etc.)
- Key campaigns and activities
- Industry

- Conferences
- Patents
- News
- Competitors
- Product launches
- Website updates
- Job vacancies
- Key people.

There are four different types of searches you can perform to track relevant brand keywords. Each modifies the specific type of data collected and aims to improve the quality and depth of the data you gather.

The four operators are:

1. **Broad match:** For example, Apple Computers. This is when any of or all words must be found in the mention.
2. **Direct match:** For example, "Apple Computers." This is denoted by quotation marks and dictates that the tool should find mentions only where the phrase appears complete and in that order in the content.
3. **Inclusive match:** For example, Apple +computers. This is denoted by a plus sign directly before a word or phrase. This will direct the tool to search for any mention that contains both Apple AND computers, although not necessarily in that order.
4. **Exclusive match:** For example, Apple –fruit. This is denoted by a minus sign directly before a word or phrase. This will instruct the tool to include only mentions that contain the first word or phrase but not when the second word is also in the same mention.

Combinations of these four types of searches (operators) can be used to improve accuracy.

For example: **"Apple Computers" +"Steve Jobs" –fruit.**

Applying this theory to the groupings above, some keywords used for Apple might be:

Company

"Apple computers"
"www.apple.com"
Apple +MacBook, "iPod Nano," "Macbook Air," "iTunes" +music –radio
"Steve Jobs"

Industry

"Consumer Electronics Show" +"Las Vegas"
"CEBIT"

Competitors

Microsoft
microsoft.com

It is also important to track common misspellings and typos, all related companies and all related websites.

Tracking the names of people key to a company can highlight potential brand attacks or can demonstrate new areas of outreach for a company.

Brand names, employee names, product names, and even competitor names are not unique. To save yourself from monitoring too much, identify keywords that will indicate that a post has nothing to do with your company and exclude those in your searches.

For example, "apple" could refer to a consumer electronics company, or it could appear in a post about the health benefits of fruit. Finding keywords that will indicate context can help save time. So, you could exclusive-match words, such as "fruit", "tasty" and "granny smith."

Tools for data sentiment analysis

Thankfully, online listening does not entail hourly searches on your favourite search engine to see what conversations are taking place online. There are many different tools that monitor the web and supply the results via email alerts or a web dashboard.

> **NOTE**
>
> Free tools like those listed here can be very useful, if somewhat limited. For larger brands, the investment in a paid tool is often worth it, given the volume of conversation to be monitored.

Google has several bespoke search services and periodically adds more to the list.

Google Alerts: google.com/alerts. Google Alerts will send an email when the keyword is used in either a credible news item or a blog post.

Google News: news.google.com. Google News searches all news items for mentions of a keyword.

Google Patent Search: patents.google.com. Google Patent Search allows you to keep track of all filings related to an industry, and searches can be done to see if there are patent filings which might infringe on other patents.

Google Video Search: google.com/videohp. Video Search relies on the data that have been added to describe a video and will return results based on keyword matches.

Twitter Keyword Targeting: This tool allows businesses or individuals to set and search particular keywords in order to drive engagement and increase conversions.

In addition to these mostly free tools, there are also a number of premium paid tools available to make the process easier and more robust. See **section 3.8: Tools of the trade** for more suggestions.

3.6.4 Other avenues for online research

Let's look at other options for conducting online research:

Personal interviews

There are various tools available to the online researcher for conducting personal interviews, such as private chat rooms or video calling. The internet can connect a researcher with many people around the world and make it possible to conduct interviews with more anonymity, should respondents require it.

Observation/online ethnography

Taking its cue from offline ethnography, online ethnography requires researchers to immerse themselves in a particular environment. In this way, insights can be gathered that might not have been attainable from a direct interview. However, they do depend more heavily on the ethnographer's interpretation and are therefore subjective.
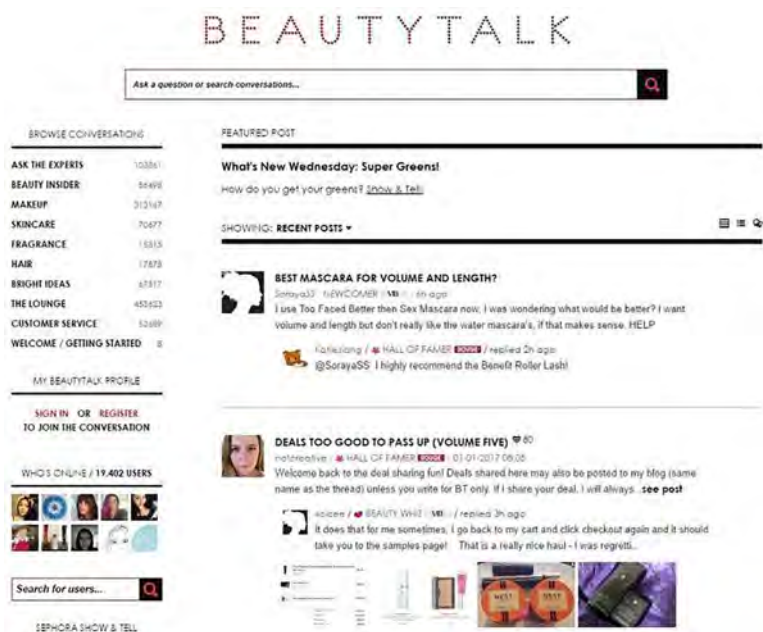
Figure 3.6 The BeautyTalk online community

Online research communities

Although online communities are a valuable resource for secondary research, communities can also provide primary data. BeautyTalk is an example of an online research community

that helps gather research data. The community platform can be used as a means to elicit feedback about products and can generate ideas for new products. This is qualitative data that can aid the company in exploring their research problem further. In many cases, social media can be used to gather insight about a brand or customer experience. It is important to remember, however, that a representative sample is necessary for making solid conclusions.

Listening labs

When developing websites and online applications, usability testing is a vital process that will ensure the website or application is able to meet consumers' needs. Listening labs involve setting up a testing environment where a consumer is observed using a website or application.

Conversion optimisation

Conversion optimisation aims to determine the factors of an advert, website, or web page that can be improved in order to convert customers more effectively. From search adverts to email subject lines and shopping cart design, tests can be set up to determine what variables are affecting the conversion rate.

> **NOTE**
>
> **Chapter 21: Conversion optimisation** covers tools for running tests, such as A/B split testing and multivariate testing.

3.6.5 How to get responses: Incentives and assurances

As the researcher, you know what's in it for you when sending out a survey. You will receive valuable insights that will aid in making business decisions. But what is in it for the respondents?

Response rates can be improved by offering respondents incentives for participating in the research, such as a chance to win a grand prize, a discount or special offer for every respondent, or even the knowledge that they are improving a product or service that they care about.

Some researchers feel that monetary incentives are not always a good thing. Some respondents may feel that they need to give 'good' or 'correct' answers that may bias results. Alternatively, you may attract respondents who are in it just for the reward. One approach could be to run the survey with no incentive, with the option of offering one if responses are limited.

Designing the survey to assure respondents that a minimal time commitment is required and their privacy is assured can also help to increase responses.

3.6.6 Room for error

With all research there is a given amount of error to deal with. Bias may arise during surveys and focus groups, for example, interviewers leading the respondents. Or bias may be present in the design and wording of the questions themselves. There could be sample errors or respondent errors. Using the internet to administer surveys removes the bias that may arise from an interviewer. However, with no interviewer to explain questions, there is potential for greater respondent error. This is why survey design is so important, and why it is crucial to test and run pilots of surveys before going live.

Respondent errors also arise when respondents become too familiar with the survey process. The general industry standard is to limit respondents to being interviewed once every six months.

Sample error is a fact of market research. Some people are just not interested, nor will they ever be interested, in taking part in research. Are these people fundamentally different from those who do? Is there a way of finding out? To some extent, web analytics, which track the behaviour of all visitors to your website, can be useful in determining this.

When conducting online research, it is crucial to understand who is in the target market and what the best way to reach that target market is. Web surveys can exclude groups of people due to access or ability. It is vital to determine if this is acceptable to the survey, and to use other means of capturing data if not.

3.7 JUSTIFYING THE COST OF RESEARCH

Regular research is an important part of any business' growth strategy, but it can be tough to justify the budget necessary for research without knowing the benefit. Conducting research can cost little more than an employee's work hours, depending on their skills, or it can be an expensive exercise involving external experts. Deciding where your business needs are on the investment scale depends on the depth of the research required, and what the expected growth will be for the business. When embarking on a research initiative, the cost to benefit ratio should be determined.

Testing should be an ongoing feature of any digital marketing activity. Tracking, a characteristic of most digital marketing, allows for constant testing of the most basic hypothesis: Is this campaign successful in reaching the goals of the business?

3.8 TOOLS OF THE TRADE

The following can be used for creating and managing online surveys:

SurveyMonkey: surveymonkey.com

Google Forms: accessed through Google Drive drive.google.com

Split test calculator: usereffect.com/split-test-calculator

Sample size calculator: rogerwimmer.com/mmr/samplesizecalculator.htm

Internet Usage World Stats: internetworldstats.com

Google Think: google.com/think

Survey Swipe: surveyanalytics.com/system/survey-swipe.html

Premium online monitoring tools: DataEQ: dataeq.com, SalesForce Marketing Cloud: salesforcemarketingcloud.com/

3.9 ADVANTAGES AND CHALLENGES

Market researchers are increasingly turning to online tools in their research processes. The internet allows for research at a far lower cost; it can also more easily cross geographic boundaries and can speed up the research process.

This is not to say there are no downsides. While the internet makes it possible to reach a far larger group of people without the cost of facilitators, it does come with some challenges. For example, you cannot control the environments in which information is being gathered. For an online sample, it's important to focus on getting the correct number of people to make your study statistically viable. If your questions are not carefully drafted, confusing questions could lead to answers that are flawed or not relevant. Additionally, online incentives could lead to answers that are not truthful, meaning that the value of the data could be questionable. Certain target groups are not accessible via the internet, and so it's important that you carefully consider who you are trying to reach.

The value of internet research should by no means be discounted, but it is important to consider the nature of the study carefully and to interrogate the validity and legitimacy of the data as a valid representation. Data is meaningful only if it is representative, so be sure to establish goals and realistic expectations for your research.

3.10 CASE STUDY: SEPHORA

Sephora is a leading international beauty retail store with over 2 600 stores across the US alone.

SEPHORA

One-line summary

Material, a leading integrated marketing services company, was commissioned by Sephora to conduct research towards understanding how racial bias affects the retail sector, and to offer insights that support Sephora in becoming a more inclusive brand.

The problem

In an attempt to ensure that the brand was aligned with its stated values of inclusivity and anti-racism, Sephora understood that racial bias could be implicit and widespread throughout its stores, impacting the retail experience of BIPOC (Black, Indigenous, People of Colour) customers and staff.

To fully understand how BIPOC experienced the retail portion of the Sephora experience (and, more broadly, all retail experiences), they commissioned a study.

The solution

Material, the company hired to put the study together, worked with their Growth Strategy and Insights divisions. They conducted interviews with shoppers and employees across the United States of America to compile a report that consisted of both quantitative and qualitative.

The research consisted of the following:

- A review of academic literature to understand retail policies and practices that may affect racial bias and discrimination
- A contextual analysis of cultural insights to determine where racial bias may manifest
- An Online SmartCommunity
- Digital ethnographies
- Employee interviews
- Online survey among 3 034 shoppers and retail employees.

On the back of the findings, Material compiled 'five truths', which could be used to develop an action plan across three key business areas: marketing and merchandising, in-store experiences, and workplace environment. This was aimed to better equip staff and head office staff to recognise and address bias and to eradicate discrimination.

The results

In January 2021, Sephora released the Racial Bias in Retail study. In it, the 'five truths' were listed and an action plan put in place.

Sephora committed to the following:

- To double its Black-owned brands
- To showcase diverse backgrounds, identities, ages, and body types in marketing materials
- To put in place a greeting system that will standardise the in-store experience for all customers
- To increase the depth and frequency of anti-bias training for staff
- To formalise and intensify efforts to recruit, mentor, and develop programs for BIPOC employees
- To put in place zero-tolerance policies for matters of bias and discrimination.

Figure 3.7. One of the initiatives that were put in place was a standardised greeting when shoppers enter the store to ensure that all shoppers have a consistent experience

The commissioning of the report and the initiatives that have emerged out of the research will position Sephora as a market leader, placing them in a favourable brand position. It also makes them an employer of choice, particularly for BIPOC.

(Sources: Material. Identifying retail truths and designing equitable experiences with Sephora. [Online]
Available at: www.materialplus.io/work/sephora-dei
[Accessed 11 February 2022]

Material, in association with Pittman Claytor, C., Crockett, D., Dunlap Fowler, W., Raspberry, P., 2021. The Racial Bias in
Retail Study.
Available at: static1.squarespace.com/static/5cd4841aaf4683aecca854d0/t/5ffcf05a5b7aeb58a721e
39e/1610412123813/Sephora_RacialBias_eBook_FInal.pdf
[Accessed 11 February 2022]

3.11 CASE STUDY QUESTIONS

1. Was it important for Sephora to insist on quantitative and qualitative research into racial bias in retail?
2. How would Sephora measure the success of interventions that they implement as a result of the report?
3. The research was two-fold: it focused on the customer experience but also staff experience. What impact does the latter have on the brand and business?

3.12 THE BIGGER PICTURE

Understanding your market is the foundation of every marketing activity, online or off. If you don't know who you're speaking to or what your audience cares about, it's unlikely that your message will resonate with them.

Market research will define the content you create across channels like email marketing, digital copywriting, SEO, and online advertising. It helps you find your audiences on social channels by indicating where they spend most of their time and how they like interacting with your brand. It also helps you meet their needs by defining the touchpoints they expect from your brand, especially when it comes to creating web and mobile channels.

The more data you can gather about your audience, the better you will be able to optimise and improve your marketing efforts. Market research is an excellent supplement to the quantitative data you can gather through data analytics.

3.13 SUMMARY

Market research means gathering and analysing data in order to gain insight to consumers, to understand a market, and make business decisions. Information can be gathered about customers, competitors and the market.

Research can be conducted based on secondary data, which refers to information or data that is already published, or based on primary data, which is data gathered specifically for a particular research problem.

Research can also be qualitative or quantitative. The internet provides the tools for gathering qualitative data, while online tools such as surveys and web analytics packages are ideal for gathering quantitative data.

Surveys, online focus groups, and online monitoring are three excellent ways to conduct research online.

Analytics and online report tools play a big role in providing data. While these are digital marketing tactics in themselves and are covered later in this book, keep in mind that they also provide information that can feed into research conducted for a particular purpose.

3.14 CHAPTER QUESTIONS

1. Discuss the relationship between the ideas discussed in **Chapter 2: Importance of the customer** and this one.
2. What is primary research?
3. What role does online research play in the overall market research toolkit?

3.15 FURTHER READING

conjointly.com/kb/probability-sampling/ – Learn about probability sampling.

s3.amazonaws.com/SurveyMonkeyFiles/SmartSurvey.pdf – The Smart Survey Design is a useful white paper that will help you master drawing up relevant web surveys.

3.16 REFERENCES

Damn, R.F., 2021. 5 Stages in the Design Thinking Process. [Online]
Available at: www.interaction-design.org/literature/article/5-stages-in-the-design-thinking-process

3.17 FIGURE ACKNOWLEDGEMENTS

Figure 3.1: canvas.unl.edu/courses/73802/pages/5-stages-of-design-thinking?

Figure 3.2: www.interaction-design.org/literature/article/5-stages-in-the-design-thinking-process

Figure 3.4: www.surveyexpression.com/Survey.aspx?id=ad3eb730-1d74-4e78-8d12-a3b7d52bfabf

Figure 3.5: www.brandwatch.com/blog/understanding-sentiment-analysis (2018)

Figure 3.6: econsultancy.com/six-successful-examples-of-online-brand-communities

Figure 3.7: pixabay.com/photos/sephora-shopping-store-makeup

Sephora logo: www.sephora.com

04

STRATEGY

In this chapter, you will learn:

- How to define the business strategy and distinguish the marketing strategy
- About the integral role of digital technology in business today
- How the shift in customer behaviour affects strategy
- About the key building block concepts that are essential to any strategy
- About the questions that need to be asked when developing a digital marketing strategy.

4.1 INTRODUCTION

Every business needs a strategy. It directs the actions of and creates the vision for the organisation to achieve its long-term objectives. The strategy involves consistent decision making that guides the route of activities and approaches that a business will take over a defined period after considering its operating environment, customers, product, and/or service offering to achieve its set goals. It also outlines the tactics and plans that you will use to execute this direction.

Typically, you will formulate your strategy based on your business goals and aspirations – whether this is purely to make money, to help the environment, to help employees find a way to contribute meaningfully to their communities, or a combination of all the above. Your answer to 'Why do we exist?' or 'Why do we do what we do?' will provide the core purpose of your business strategy, which will in turn direct how you will reach your goals.

In marketing, strategy starts by understanding what the business wants to achieve, what problem it wants to solve, who the business serves (i.e., the customer), and how it will add value to the market. It then considers the context in which the business and its competitors operate to outline the key methods to gain competitive advantage and add value.

In 2020, the world changed. As a result of global lockdowns and international social distancing laws, digital communication technology instantaneously facilitated the need to connect, communicate, and operate without direct human contact. Digital quickly became integral to every area of business to continue running – at least, for those businesses that could still operate. As a result, it has become vital for companies to adopt a holistic approach to planning their business and marketing strategies in a way that integrates digital technology as a standard business practice, rather than just an add-on.

This chapter considers digital as an integral part of the strategy to reach customers and solve marketing problems, while focusing on getting the basics right.

4.2 KEY TERMS AND CONCEPTS

Table 4.1

Term	Description
Analytics	Information resulting from the systematic analysis of data or statistics.
Business Objectives	The results of what the business aims to achieve.
Campaign	A series of actions that are organised and implemented to achieve a goal.

Digital transformation	The process of becoming a digital enterprise – an organisation that uses technology to evolve all aspects of its business (what it offers, how it interacts with customers, and how it operates)
Display advertising	A form of advertising that uses a banner with images, text, logos, and/or video to showcase brand messaging.
Keyword search	A search that looks for documents that match the word or combination of words in a search engine.
KPIs	Key Performance Indicators.
Market share	In strategic management and marketing, the percentage or proportion of the total available market or market segment being serviced by a company.
Metric	A unit of measurement.
Pay per click (PPC)	Advertising where the advertiser pays only for each click on their advert, not for the opportunity for it to be seen or displayed.
Return on investment (ROI)	The ratio of cost to profit.
Search engine optimisation (SEO)	The practice that aims to improve a website's ranking for specific keywords in search engines.
Short Message Service (SMS)	Electronic messages sent on a cellular network.
SMART objectives	**Specific** – clear and detailed, rather than vague and general. **Measurable** – measurable to gauge whether the desired outcomes are attained. **Attainable** – something that is possible for the brand to achieve, based on available resources. **Realistic** – sensible and based on data and trends. **Time-bound** – linked to a specific timeframe.
Strategy	A set of ideas that outline how a product or brand will be positioned and achieve its objectives. This guides decisions on how to create, distribute, promote, and price the product or service.
Tactic	A specific action or method that contributes to achieving a goal.

Targets	The goals, focus areas, or intentions of something that is set to be achieved.
Types of media	Different forms of general communication channels used for broad reach, which involves the use of content and a device through which content is delivered.
Paid, earned, and owned media	**Paid media** – content that requires payment in exchange for publishing. **Earned media** – content that others publish about a business's brand at no cost. **Owned media** – content that the brand publishes on platforms that it manages and controls.

Before we get into this chapter, consider what we have covered in the previous chapters of our **Planning** section so far. What you have already learned will prepare you for some of the important activities involved in setting up a successful marketing plan, including:

* Planning your campaigns
* Setting campaign objectives
* Defining the target audience
* Selecting campaign tactics
* Determining budget allocations
* Setting the timeline.

4.3 UNDERSTANDING MARKETING STRATEGY

Before starting your marketing strategy, it is important to first understand the business and brand with which you are working.

4.3.1 Business and brand strategy

The goal of any business is to make money. To do so successfully, business strategy needs to ask a few important questions, such as "What is the business challenge that we are facing that prevents us from making more revenue?" and "What business objective/s should we strive for to increase the money in the bank?"

Although still relevant, the world has evolved. These questions were sufficient to kickstart the business strategy before the global COVID-19 pandemic, but as global uncertainty remains a certainty, we cannot ignore the effects of lockdowns and social distancing that prevailed in 2020 and 2021. Businesses that adopted technology proved to be far more resilient in the wake of the changes. Using digital communication technology proved to be effective in compensating for online interactions and connections. For this reason, businesses should answer a few more questions concerning technology and how it affects business operations.

Consider the following:

- What is digital technology's role in my business?
- How will we achieve success in the current and future environment?

To improve business performance, it is vital that you consider the impact of technology on your operations, processes, and customers. The role that digital can play in your business strategy may include:

- To offer a better understanding of how people are living their lives (B2C)/how businesses are operating in the contemporary world (B2B)
- To offer an idea of various opportunities, what is feasible for your business, and your value proposition.

Determining the role of digital in your business will assist in making key decisions to drive the business' strategic direction. Once you determine your business imperatives for survival and growth, you will also identify important organisational focus areas for your brand and marketing objectives.

Brand, however, proves why the business matters. It demonstrates the reasons to believe, justifies the business' purpose, and reinforces the value that the business adds to people's lives. In line with the business strategy, the brand strategy provides the roadmap for the business to achieve its goals and objectives. It focuses on the customer and their needs, the brand's identity, and the business' key value propositions.

The American Marketing Association (AMA) defines a brand as, "A name, term, design, symbol, or any other feature that identifies one seller's goods or service as distinct from those of other sellers. The usual expression of a brand is its trademark. A brand may identify one item, a family of items, or all items of that seller". To quote Fred Burt from Siegel+Gale, a brand presents "a reason to choose" one product or service over another.

The value of the brand is measured by how well the product and/or service sells, the role that the brand plays in customer buying decisions, and its competitive strength. Other than through the financial performance of the brand, it is not always straightforward to measure brand value. By building brand awareness and recognition through marketing and advertising, creating positive customer experiences, and fostering brand loyalty, you can enhance your brand equity to increase brand value.

Here are a few brand-related questions that you may want to ask:

- Is this brand designed to grow at a rate of knots?
- Is it designed to deliver consistent decent returns?
- Is it an experiment and designed to test the waters in a new market or an endeavour for the company's portfolio as a proof of concept?
- Is the company trying to quietly demarket the brand and giving it a form of palliative care? (e.g. through the BCG model of cash cows, stars, question marks, and pets)

When you have the answers to these questions, you can start to formulate a marketing strategy to address the challenge or objective you've discovered.

4.3.2 Marketing strategy

The purpose of a marketing strategy is to reach the brand's target market and turn people into buyers of the business' product/s and/or service/s. It uses the business and brand strategy to determine its objectives and then packages the value proposition and offering to the market. The marketing strategy also addresses business and brand challenges or objectives.

An effective strategy involves making a series of well-informed decisions about how the brand, product, or service should be promoted. A brand that attempts to be all things to all people risks becoming unfocused or losing the clarity of its value proposition. It is therefore important to be authentic when presenting your brand and offering to the market – especially in the digital age – because of its reach. Connecting with people should be your number one priority.

For example, if a new financial technology company wants to launch successfully, the marketing strategy would need to focus on what its target audience requires. It will prioritise customer benefits when presenting its value proposition, while differentiating itself from its competitors. It will also consider whether its product is local or international, whether its target market is small business owners or established corporate decision makers, and whether the channel to reach its target market would be through networking, word of mouth, or social media. Each of these choices will result in a vastly different strategic direction.

To make these decisions, a strategist must understand the context in which the brand operates, asking, "What are the factors that affect the business?" This means conducting a situational analysis that looks at the following four pillars:

1. The environment
2. The business
3. The customers
4. The competitors.

Here are some considerations and tools for conducting your brand's situational analysis.

Understanding the environment

The environment is the overall context or 'outside world' in which the business functions. It can involve anything from global economics (how well is the local currency performing these days?) to developments in your industry (how does remote work affect daily business processes?). Every brand will have a specific environment that it needs to consider, based on the type of product or service it produces.

An analysis of the business and brand environment will typically consider political, economic, social, technological, legal, and environmental (PESTLE) influences to identify a clear set of

issues pertinent to the marketing strategy. Although each element influences the analysis of the environment, technology has proven to be a particularly valuable enabler of strategy for businesses and consumers globally. It will be important for you to prioritise digital transformation in your business.

You should consider a few important matters, such as:

- Where will we compete in terms of geographies, product categories, consumer segments, channels, vertical stages of production?
- What role will digital play in this?

The process of digital transformation will help you to identify where growth will come from and determine the following:

- Will growth come from new geographies?
    - Will it be possible to find growth in existing targets through premiumisation or by targeting the middle- and/or low-end markets? What will be required here to achieve this?
    - Will your business find growth through verticalisation? (i.e., If you are Facebook, do you try to grow in the mindfulness space? Or, if Twitter, by buying CNN?)
    - Do you find growth by targeting adjacencies? (i.e., If you are Headspace, do you try to grow in the exercise space?)
- Do you try to rebuild the economic model of the business by playing in subscription rundles (recurring revenue bundles) instead of the attention economy?

If you are going to complete a digital transformation process for your business, the digital strategy will need to respond to the questions and considerations above, in addition to how to execute against a brand's segmentation.

Understanding the business

There are several marketing models that can be used to understand the business and brand with which you are working. It is essential for all marketing messages to encapsulate the brand's identity and objectives. A crucial consideration is the brand itself. What does it stand for? What does it mean? What associations, ideas, emotions, and benefits do people associate with it? What makes it unique?

> **NOTE**
>
> The founder of Revlon, Charles Revson, always used to say he sold hope, not makeup. Some airlines sell friendly service, and Wall-Mart sells bargains. Read more on this topic here: www. entrepreneur.com/encyclopedia/unique-selling-proposition-usp

From this, you can determine what the brand or product's unique selling point (USP) is. A USP is the one characteristic that can make your product or service better than that of the competition. Ask yourself, "What unique value does it have? Does it solve a problem that no other product does? Are we fulfilling a customer need, behaviour or habit? Is our brand relevant to our customer?"

There are several levels of branding to investigate, as shown below.

Brand idea
The essence of your brand

Brand/product persona
The manifestation of the brand in human characteristics

Emotional benefits
How does your product/service make the consumer feel?

Functional benefits
Summarises the tangible benefits to the consumer

Features & attributes
Tangible assets of your product or services focus on most desirable/differentiation

Brand pyramid template

Figure 4.1 Understanding the business's brand.

Relevance is important for brands in the digital age. It is the difference between a successful brand and a brand that is ineffective, because connecting to your customer in ways that resonate, will lead to growth for your business.

Understanding customers

Market research is essential if you want to understand your costumers. Try not to make assumptions about why people like and transact with your brand – you may find their values and motives are quite different from what you thought. Ongoing research and a data driven business will help you to build a picture of what particular benefit or feature your business provides to your customers, allowing you to capitalise on this in your marketing content.

One important area on which to focus here is the consumer journey, which is the series of steps and decisions a customer takes before buying from your business (or not). Luckily, online data analytics allow you to get a good picture of how people behave online before converting to customers. Other forms of market research will also help you establish this for your offline channels.

The surge in the use of digital technology to connect and market has changed the customer journey – both online and offline. Consumers may engage with your brand in a variety of ways (across devices or marketing channels) before making a purchase. In addition, how your brand resonates with the customer will affect how they respond to your offer.
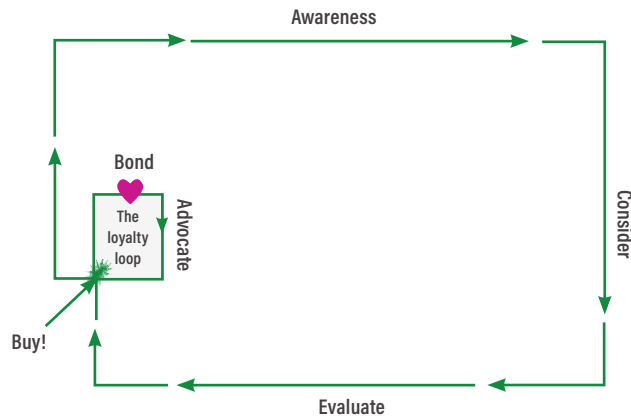
Figure 4.2 The customer journey is cyclical

The goal is to reach customers with the right marketing message at the right stage of their journey, in the right context, and in a way that is relevant. For example, you may want to use aspirational messages for someone in the exploration phase, but focus on more direct features and benefits (such as a lower price) when they're almost ready to buy.

The COVID-19 pandemic has had a massive effect on people, who have had to adapt to new ways of connecting, using technology to achieve what they want. This has unlocked a global market for them, which is why brands need to meet consumers in the technological spaces they have chosen. The consumer relationship with technology is about accessibility – theirs to brands and products, and the brands' to theirs. This has shifted a great deal of power to the consumer.
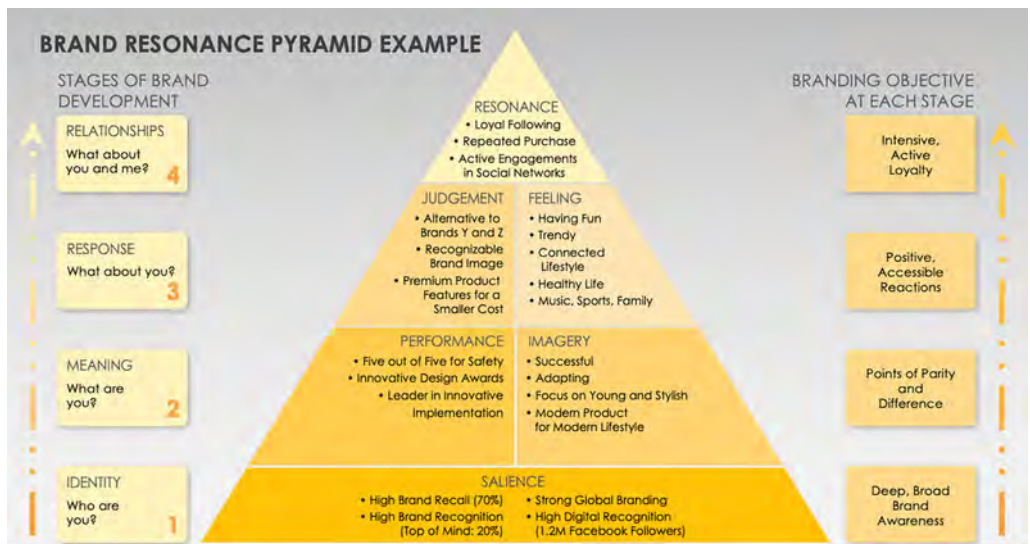
Figure 4.3 Keller's brand equity model

This connection to technology offers many opportunities for marketers. Every new technology embraced by a consumer offers brands new ways to collect information about them. This leads to more granular segmentation and more targeted marketing messages.

Building a powerful brand takes time. Use Keller's brand equity model as an opportunity to ask the right questions to strengthen your brand.

Understanding competitors

It's important to know who else is marketing to your potential customers, what they offer, and how you can challenge or learn from them. Many competitors target the same needs in each customer, sometimes through very similar products. Positioning places your brand in a unique place in people's minds. It is impossible to create a strong value proposition or USP without knowing your competitors' positioning strategy.

On the internet, your competitors are not just those who are aiming to earn your customers' money; they are also those who are capturing your customers' attention. With more digital content being created in a day than most people could consume in a year – for example, over 500 hours of video are uploaded to YouTube every minute as of February 2020 (Statista, 2022) – the scarcest resources these days are time, focus, and attention.

When considering competition, it's also worthwhile to look at potential replacements for your product. The internet has disrupted and accelerated the pace of disintermediation in several industries, meaning that people can now go directly to the business instead of transacting through a middleman (look at the travel industry as an example). To stay ahead, you should be looking at potential disruptors of your industry as well as the existing players.

4.3.3 Digital marketing strategy

Once you have a clear sense of what the business challenge or objective is, you can define how your marketing strategy will leverage digital channels to fulfil it.

As discussed in the introduction, digital should not be considered as separate from your core strategy. Digital marketing builds on and adapts the principles of traditional marketing, using the opportunities and challenges offered by the digital medium.

A marketing strategy should be constantly iterating and evolving. Since the internet allows for near-instantaneous feedback and data gathering, marketers should constantly be optimising and improving their online marketing efforts to remain relevant in consumers' minds.

Customer-centric thinking, which involves placing the user at the core of all decisions, is vital when looking at building a successful marketing strategy. Today's marketing strategist offers not only a plethora of tactical possibilities, but also unprecedented ways of measuring the effectiveness of chosen strategies and tactics. Digital allows greater opportunities for interaction and consumer engagement than were possible in the past, so it is important to consider the ways in which the brand can create interactive experiences for consumers, not just broadcast messages.

One of the key strengths of digital marketing is that it is highly empirical – almost everything can be measured, from behaviours to actions and action paths, to results. Insight tools can even be used to track the sentiment of users towards certain elements online. This means that the digital marketing strategist should be constantly measuring and adapting to ensure the highest ROI. Built into any strategy should be a testing framework and the ability to remain flexible and dynamic in a medium that shifts and changes as user behaviours do.

If we defined strategy as a plan of action designed to achieve a particular outcome, the desired outcome of a digital marketing strategy would be aligned with your organisation's overall business and brand building objectives or challenges. For example, if one of the overall objectives was acquisition of new clients, a possible digital marketing objective might be building brand awareness online.

4.4 THE BUILDING BLOCKS OF MARKETING STRATEGY

The following building-block techniques will help you structure a marketing strategy, both on- and offline, that addresses your core business challenges. These strategy models are just starting points and ways to help you think through problems. As you grow in experience and insight, you could find yourself relying on them less or adapting them.

4.4.1 Porter's Five Forces analysis

Porter's Five Forces analysis is a business tool that helps determine the competitive intensity and attractiveness of a market. The internet's low barrier to entry means that many new businesses are appearing online, providing countless choices for customers. This makes it important to consider new factors when devising a marketing strategy.
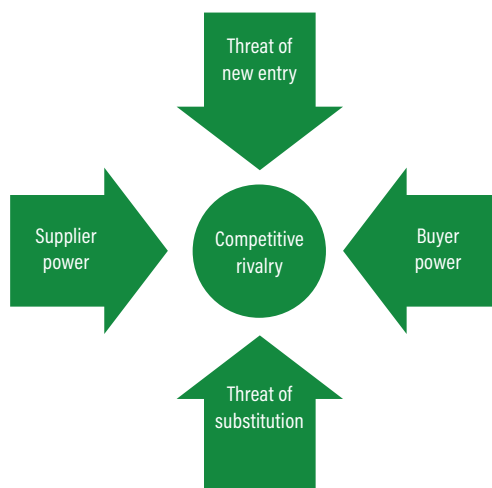
Figure 4.4 Porter's Five Forces analysis

4.4.2 The four Ps

The four Ps of marketing help you structure the components that make up a brand's offering, differentiators, and marketing. They have been fundamentally changed by the internet and need to be looked at in the context offered by digitally connected media, and from the perspective of the consumer. Your success will ultimately be determined by how your brand is positioned in the mind of your consumer.

1. Products (and services)

Products and services are what a company sells. The internet enables businesses to sell a huge range of products, from fast-moving consumer goods and digital products such as software, to services such as consultancy. In fact, the internet has in some cases made it possible for a product or service to exist, for example Netflix and Amazon. Online, the experience the user has in discovering and purchasing can be considered part of the product the brand provides or the product itself.

The internet has enabled hyper-personalisation. Nike (nike.com/za/nike-by-you) and Converse (converse.com), for example, allow customers to customise their own trainers, which gives these brands a unique competitive advantage. The internet as a distribution medium also makes it possible for products, such as software and music, to be sold digitally.

2. Price

The prevalence of search engines and of shopping comparison websites, such as shopping. google.com and pricegrabber.com makes it easy for customers to compare product prices across several retailers. This makes the internet a market of near-perfect competition (Porter, 2008). The internet allows for personalised and flexible pricing strategies to a level that traditional retailers would find almost impossible to achieve.

With price differentiation becoming a challenge, especially for smaller players in the market, businesses need to consider differentiating on value. Value is a combination of service, perceived benefits, and price, where customers may be willing to pay a higher price for a better experience or if they feel they are getting something more than just the product.

3. Placement (or distribution)

Product distribution and markets no longer have to be dictated by location. By simply making their products visible online (for example, on a website or Facebook page), brands can now reach a global market. The key is to reach and engage customers on the channels they are using. This is why choosing your digital tactics is vital. You want to engage customers on their terms, not yours by showing them your commitment to meeting their needs. Ultimately, you want your customers to share in the experience of your brand wherever they are in the world.

4. Promotion

The internet, as an information and entertainment medium, naturally lends itself to promoting products. The online promotional mix is an extension of the offline, but with some significant differences. Online promotion can be tracked, measured, and targeted in a far more sophisticated way.

Promotion doesn't just mean advertising and pushing notifications to customers. On the internet, it's also crucial to engage, collaborate, and join conversations. Online listening, reading reviews, comments, and feedback on social platforms and websites that display customer feedback, offers valuable insights that can help build relationships. The web makes this sort of communication easy, which is why a good portion of this book is dedicated to engagement tactics and tools.

> **NOTE**
> Many additional Ps have been suggested and debated over time. We've restricted our discussion to the four listed here, but you should do some research and join the debate with your own point of view.

4.4.3 SWOT analysis

A SWOT analysis (Strengths, Weaknesses, Opportunities, Threats) is an ideal way to understand your business and your market. By conducting a SWOT analysis of your company, you will be forced to look at your business in new ways and from new directions.

> **NOTE**
> A SWOT analysis is a beneficial tool that will help you assess your business at a high level, taking into account your value proposition, offering, and the environment in which you operate.

Figure 4.5 SWOT analysis

Always have a purpose in mind when conducting a SWOT analysis. For example, study the external threats to your business and see how learning from these can help you overcome internal weaknesses. This should tie back into your business and marketing objectives; strengths should be promoted, opportunities should be sought out, while threats and weaknesses should be minimised or converted into opportunities as much as possible. A SWOT analysis is part of a situational analysis and identifies the key issues that direct the marketing strategy. Be mindful of the fact that weaknesses can be opportunities and strengths threats, especially in the world of digital disruption.

4.5 CRAFTING A DIGITAL MARKETING STRATEGY

Any activity with an end goal or target should have a plan of action in place for every person in the organisation to follow. In digital marketing, however, there is no single definitive approach so each business must create its own roadmap. But, there are questions you can use to guide this process.

A strategy needs to distinguish between who you are and who you are not. It should also include what you are offering and to whom, as well as why and how you are doing so. The steps and questions below cover what an organisation should be aware of when creating and implementing a strategy that will meet its marketing objectives and solve its challenges.

1. Context

The first step in crafting a successful strategy is to examine the context of the organisation and the various stakeholders. We covered this under marketing strategy earlier in this chapter, but here's a quick recap.

- What is the context in which you are operating (PESTLE factors) and how is this likely to change in the future?
- Who are you, why does your brand matter, and what makes your brand useful and valuable?
- Who are your customers, and what needs, wants, and desires do they have?
- Who are your competitors? These may extend beyond organisations that compete with you based on price and product and could also be competition in the form of abstracts, such as time and mindshare. Thorough market research will reveal the answers to these questions.

2. Value exchange

Once you have examined the market situation, the second step is an examination of your value proposition or promise: in other words, the unique value your organisation can add to that market. It is important to identify the supporting value-adds to the brand promise that are unique to the digital landscape. What extras, beyond the basic product or service, do you offer to customers? What do your customers expect or need to gain value from your brand?

The internet offers many channels for value creation. However, the definition of what is 'valuable' depends largely on the target audience, so it is crucial to research your users and gather insights into what they want and need. Gathering the right data can help you evolve this value exchange over time.

3. Goals

When setting your digital marketing goals, there are four key aspects to consider: objectives, goals, tactics, key performance indicators (KPIs), and targets. Let's look at each one in turn.

Objectives

Objectives are essential to any marketing endeavour; without them, your strategy would have no direction and no end goal or win conditions. It's important to be able to take a step back and ask, "Why are we doing any of this? What goal, purpose or outcome are we looking for?"

- What are you trying to achieve?
- How will you know if you are successful?

Sometimes, words like 'objective' can be used in different situations with slightly different meanings. Remember, the objective of a website or online campaign is aligned with the strategic outcomes of the business. The objective of a campaign may be to create awareness for a new business or increase sales of a product. The objective answers the question, "What do we want to achieve with this *marketing* campaign?" For example, an objective might be to increase the sales of a product, grow brand awareness, or increase website traffic. A business objective (something that your business will either do or not do) and a marketing objective (a change in customer behaviour that your business wants to achieve) are not the same thing!

Objectives need to be SMART:

- **Specific:** The objective must be clear and detailed, rather than vague and general.
- **Measurable:** The objective must be measurable so that you can gauge whether you are attaining the desired outcome.
- **Attainable:** The objective must be possible for your brand to achieve, based on available resources.
- **Realistic:** The objective must also be sensible and based on data and trends; don't exaggerate or overestimate what can be achieved.
- **Time-bound:** The objective must be linked to a specific timeframe.

Goals

The goal of a website or campaign in web analytics refers to an action that a user takes on a website or a type of user behaviour. This action could be making a purchase, signing up for a newsletter, or viewing a certain number

NOTE

Goals related to visitor behaviour, such as time spent on site or page views per visit, are referred to as engagement goals.

of pages in a visit. A completed goal is called a conversion. Goals are derived from objectives and answer the question, "What do we need users to do in order to achieve our objective?"

Tactics

Objectives are not the same as tactics. Tactics are the specific tools or approaches you will use to meet your objectives, for example, a retention-based email newsletter, a Facebook page, or a CRM implementation. As a strategy becomes more complex, you may have multiple tactics working together to try to achieve the same objective. Tactics may change (and often should), but the objective should remain your focus. We'll look at tactics in more detail in the next section.

Key performance indicators (KPIs)

Key performance indicators or KPIs are metrics that are used to indicate whether tactics are performing well and meeting your objectives. There are many metrics to be analysed, and determining which are important will help to focus on what really matters to a particular campaign. KPIs relate closely to goals and answer the question, "What data do we need to look at to see if goals are being completed?" If, for instance, your objective is to increase website traffic, you may look at the number of website visitors, the percentage of new visitors, and how long users stay on the site.

KPIs are determined per tactic, with an eye on the overall objective. The diagram below shows how a few KPIs can feed into one goal and several goals can feed into one objective. A single objective can have a few goals, each with their own number of KPIs, to ensure it is achieved.
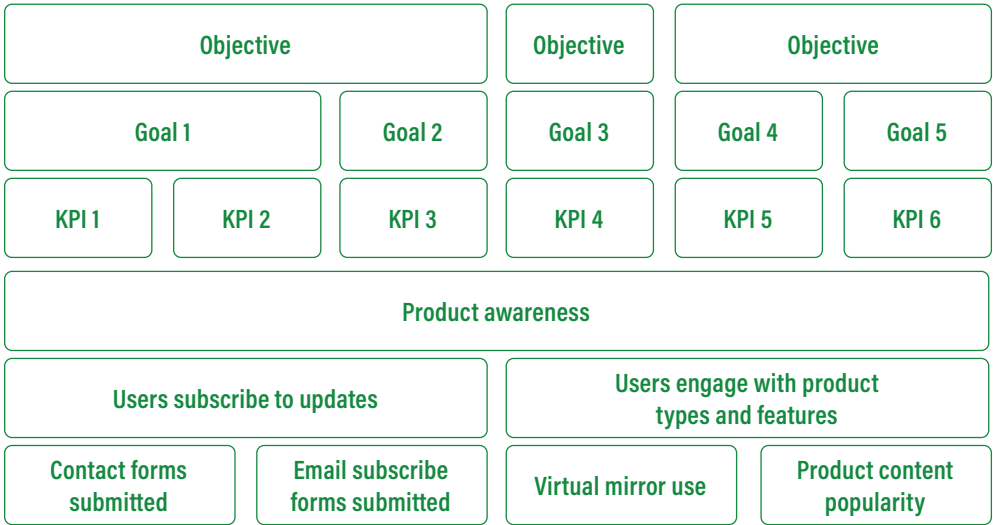
Figure 4.6 Objectives, goals, and KPIs

Targets

Targets are the specific values that are set for your KPIs to reach within a specific period. That is, they are the actual target values that KPIs need to meet for the campaign to be declared a success. Sportspeople need to reach targets to advance their careers, for example, come in the top ten to qualify for the final or run 10 km in under 27 minutes. If you meet or exceed a target, you are succeeding; if you don't reach it, you're falling behind on your objectives and need to reconsider your approach (or your target). If one KPI is 'newsletter subscriptions', then a target might be 100 subscriptions every month. If one month falls short at 70, this will quickly reveal that a fix is required.

When setting objectives and targets for any campaign, remember to think about overlaps in customer behaviour that might impact how you measure your success. People might click on an ad and visit your website to buy something, but they could also browse and then go and buy something in the brick-and-mortar store. The total economic value of online activities needs to account for this so that you can get an idea of the true contribution digital is making.

Here is an example:

SMART objective:

- Increase sales through the ecommerce platform by 10% within the next six months

Tactics:

- Search advertising
- Social media marketing using the Facebook brand page

KPIs per tactic:

- Search advertising – number of search referrals, cost per click on the ads
- Facebook brand page – number of comments and shares on campaign specific posts

Targets per tactic:

- Search advertising – 1 000 search referrals after the first month, with a 10% month-on-month increase after that
- Facebook brand page – 50 comments and 10 shares on campaign-specific posts per week.

4. Tactics and evaluation

Many digital tools and tactics are available once you have defined your digital marketing objectives. Each tactic has its strengths, for example, acquisition (gaining new customers) may best be driven by search advertising, while email is one of the most effective tools for selling more products to existing customers.

The table below expands on some of the most popular tactics available to digital marketers and their possible outcomes.

Table 4.2 Marketing tactics

Tactic	Outcome
SEO	**Customer retention and acquisition**
This is the practice of optimising a website to rank higher on the search engine results pages for relevant search items. SEO involves creating relevant, fresh, and user-friendly content that search engines index and serve when people enter a search term that is relevant to your product or service.	SEO has a key role to play in acquisition, as it ensures your organisation's offering will appear in the search results, allowing you to reach potential customers. A site that is optimised for search engines is also a site that is clear, relevant, and well designed. These elements ensure a great user experience, meaning that SEO also plays a role in retention.
Search advertising	**Sales, customer retention and acquisition**
In pay-per click or search advertising, the advertiser pays only when someone clicks on their ad. The ads appear on search engine results pages.	The beauty of search advertising is that it is keyword based. This means an ad will come up in response to the search terms entered by the consumer. It therefore plays a role in sales, acquisition and retention. It allows the advertiser to reach people already in the buying cycle or expressing interest in what they have to offer.
Online advertising	**Branding and acquisition**
Online advertising covers advertising in all areas of theiInternet – ads in emails, ads on social networks and mobile devices, and display ads on normal websites.	The main objective of online advertising is to raise brand awareness online. It can be more interactive and therefore less disruptive than traditional, or static online advertising, as users can choose to engage with the ad or not. Online advertising can be targeted to physical locations, subject areas, past user behaviours, and much more.
Affiliate marketing	**Sales and branding**
Affiliate marketing is a system of 'rewards' whereby referrers are given a 'finder's fee' for every referral they give.	Online affiliate marketing is widely used to promote ecommerce websites, with the referrers being rewarded for every visitor, subscriber, or customer provided through their efforts. It is a useful tactic for brand building and acquisition.

Video marketing	Branding, customer retention and value creation
Video marketing involves creating video content. This can be outright video advertising or valuable, useful, content marketing.	Since it is so interactive and engaging, video marketing is excellent for capturing and retaining customer attention. Done correctly, it provides tangible value – in the form of information, entertainment, or inspiration – and boosts a brand's image in the eyes of the public.
Social media	Branding, value creation and participation
Social media is media in the form of text, visuals, and audio that can be shared online. It has changed the face of marketing by allowing collaboration and connection in a way that no other channel has been able to offer.	From a strategic perspective, social media is useful for brand building, raising awareness of the brand and its story, and encouraging the customer to become involved with the brand. The shareable and accessible nature of social media platforms allows brands to communicate and engage directly with their customers. Social media also offers brands a way to interact with their customers, instead of just broadcasting to them.
Email marketing	Customer retention and value creation
Email marketing is a form of direct marketing that delivers commercial and content-based messages to an audience. It is extremely cost effective, highly targeted, customisable on a mass scale and completely measurable – all of which make it one of the most powerful digital marketing tactics.	Email marketing is a tool for building relationships with potential and existing customers through valuable content and promotional messages. It should maximise the retention and value of these customers, ultimately leading to greater profitability for the organisation as a whole. A targeted, segmented email database means that a brand can direct messages at certain sectors of their customer base in order to achieve the best result.

Once the objectives and tactics have been set, these should be cross-checked and re-evaluated against the needs and resources of your organisation to make sure your strategy is on the right track and no opportunities are being overlooked.

5. Ongoing optimisation

It is increasingly important for brands to be dynamic, flexible, and agile when marketing online. New tactics and platforms emerge every week, search algorithms are updated and refreshed often, customer behaviours change over time, and people's needs and wants from brands evolve as their relationship grows.

This process of constant change should be considered in the early stages of strategy formulation, allowing tactics and strategies to be modified and optimised as you go. After all, digital marketing strategy should be iterative, innovative, and open to evolution.

Understanding user experience and the user journey is vital to building successful brands. Budget should be set aside upfront for analysing user data and optimising conversion paths.

Social thinking and socially informed innovation are also valuable and uniquely suited to the online space. Socially powered insight can be used to inform strategic decisions in the organisation, from product roadmaps to service plans. Brands have moved away from being merely present in social media towards actively using it, aligning it with actionable objectives and their corresponding metrics. This is critical in demonstrating ROI and understating the opportunities and threats in the market.

Managing the learning loop (the knowledge gained from reviewing the performance of your tactics, which can then be fed back into the strategy) can be difficult. This is because brand cycles often move more slowly than the real-time results you will see online. It is therefore important to find a way to work agility into the strategy, allowing you to be quick, creative, and proactive, as opposed to slow, predictable, and reactive. The data collected around success of your marketing strategy should feed into a larger pool of information used to drive business decisions.

4.6 CASE STUDY: VETS NOW: TAKING CARE OF THE BRAND

Vets Now, an industry-known UK accident and emergency veterinarian service, is dedicated to improving the lives of pets by providing emergency care when most vet surgeries are closed.

One line summary

Vets Now wanted to become the brand of choice amongst consumers and veterinarians by improving brand awareness and appeal to customers and delivering exceptional care to pets and owners.

The problem

Vets Now provided their accident and emergency service to over 1 000 veterinary practices across the UK. But, with more and smaller local emergency veterinary clinics opening and day clinics starting to offer out-of-hours services, Vets Now was experiencing intense competition. They decided to target pet owners directly and make themselves the brand of choice for pet owners, if and when their pet required emergency care.

However, the brand didn't deal directly with clients too often, and brand awareness of Vets Now among pet owners was at about 8% (despite 1 in 4 UK vet practices using the service).

The brand was also offering inconsistent sub-brands, which confused pet owners. Vets Now wanted to improve brand awareness, consolidate their offering, and create a pet-owner led approach.

The solution

Vets Now recognised that they needed to conduct a brand audit to determine their unifying core purpose. A brand workshop was held, and the key insight was that emergency and critical care were the heart of the brand. All other sub-brands and straplines were negating from this core message. The brand wanted to present a singular pet owner brand proposition and developed the single unifying strapline: Introducing Vets Now – Your pet emergency service.

To appeal to customers directly, they needed to know who their potential customers were and what their feelings were towards their pets. Vets Now conducted surveys, interviews, and focus groups with over 1 000 pet owners. They identified 8 pet owner types, and highlighted the key drivers behind pet ownership in the UK. They then mapped out the owner types against these drivers.
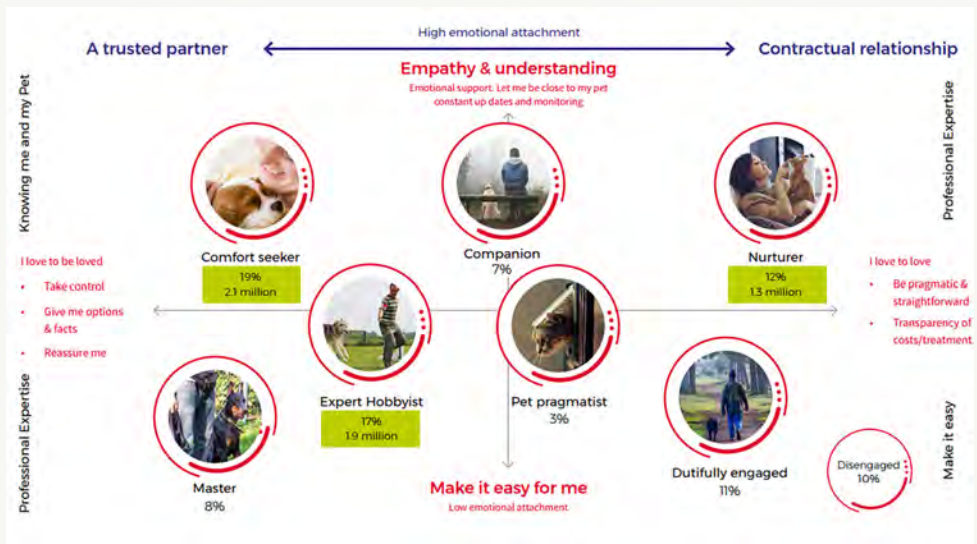
Figure 4.7 Map of pet ownership from Vets Now (2018)

The key insight was that pet owners expect others to treat their pets as they would other human beings. This means that the care and professionalism offered to pets are paramount. Pet owners are dedicated to keeping their pet happy and healthy and want the best care possible if an emergency were to occur. Pet owners needed emotional support and reassurance when dealing with an emergency involving their pet.

Vets Now also identified three touchpoints of customers with the brand:

- Search and online: Finding an emergency vet
- Clinica: Referring to Vets Now by another veterinary clinician
- Social space: Engaging with other pet owners and online content.

Using these insights, the brand consolidated itself as one single brand offering. The brand also identified its essential brand principles and used these to inform all its branding and marketing communication. Vets Now created new branding and imagery and chose a reassuring and expert but friendly and straightforward tone of voice to use across all communication. This unified and consolidated look and feel conveyed the core purpose of the brand and offered consumers brand recognition.

This new look and feel was rolled out across the website, Vets Now hospitals and clinics, internal branding, and in print and digital marketing campaigns. These were chosen to ensure the new branding reached consumers at all three touchpoints.

The marketing campaign included various platforms and a mixture of traditional and digital tactics. There were print and digital ads, as well as content delivered across the website, social media, printed flyers, and in-clinic posters. Content included emergency plans for illness and accidents, as well as dangers present in the home during the Christmas holiday period. It also included information about how to ensure a pet stays happy and healthy over the festive season. This content was specifically created to resonate with the audience and used the insights gained from the in-depth research conducted by the brand to inform content development and creation.

The results

The research and ensuing strategy ensured the brand's awareness among customers increased. After the campaigns and rebranding, 59% of respondents had an unprompted recall of Vets Now, up 20% from before the campaign. Within the sample of respondents, propensity to use Vets Now after the campaign was up 138%. These were strong indicators of positive performance. The new website also saw a 23% drop in bounce rate within 5 days of going live, showing that the brand was now more in line with what users were searching for.

The importance of relooking at your brand and really investigating your customers is clearly demonstrated in this case study. It shows how a B2B brand can reposition itself as B2C with the right analysis and strategy. Clearly laying down your objectives, doing the necessary research and identifying how to address your customer across all touchpoints is essential to marketing strategy.

4.7 CASE STUDY QUESTIONS

1. What was Vets Now's new brand strategy?
2. Why was it necessary for Vets Now to do such extensive customer research?
3. Could it be argued that this case study covers a business strategy rather than a marketing strategy?

4.8 THE BIGGER PICTURE

All the chapters in this book are linked to digital marketing strategy in one way or another.

A solid business and brand strategy should be the starting point of any marketing venture, and you should always keep one eye on it as you develop specific campaigns, platforms, and approaches. After all, you should always remember that you are trying to reach your chosen audience by communicating with them in the most effective way to build rewarding and lucrative long-term relationships.

While strategy helps you understand the questions you should ask, data collected across your business, including market research, provides the information you need to answer them.

4.9 SUMMARY

Strategy is the essential first step in positioning your brand within the market and creating a roadmap for achieving your business goals. While there are many different paths one can take, there is a clear process for understanding where you are, where you need to be, and how you will get there. It all starts with understanding the business challenges that your brand faces. From there, an effective marketing strategy looks at the market context, weighs the available options, and makes important choices, based on solid research and data. Digital adds a layer of technology, engagement, and iterative optimisation into the strategic process. The wide variety of tools and tactics offered by the digital medium should inform your strategic choices, including data.

The more data you collect, the more relevant you can make your customer experience. Relevance leads to a better customer experience, which leads to more opportunities to collect data. A customer-focused, data-driven organisation needs to embrace this cycle, which enables both incremental and disruptive innovation.

Businesses need to embrace dynamic data that enables them to keep a clear view of their evolving customer. This data strategy should be built around lagging, current, and leading or future indicators, each of which can give you a different piece of the data puzzle. If this happens, the business will have a clear view of past and current performance as well as where they can go in the future.

Digital can make marketing strategy highly empirical, and your strategic thinking should be mindful of ROI and how it can be measured. This will allow you to optimise your tactics and performance to create a valuable brand story, an excellent user experience, the most optimised conversion funnels, and the highest ROI.

4.10 CHAPTER QUESTIONS

1. Why is it important to consider the business context when planning your marketing strategy?
2. How has the internet affected marketing and the models we use to understand it?
3. Do you agree with the idea that customers are more empowered than they were before digital communications were so prevalent? Justify your answer.

4.11 FURTHER READING

adverblog.com – A digital marketing blog that collates ideas from marketing campaigns around the world.

gigaom.com – GigaOM's community of writers covers a wide range of technological copies.

Positioning: The Battle for Your Mind – This book by Ries & Trout published in 2002 offers excellent advice claiming space in the minds of consumers.

seths.blog – Seth Godin's popular blog provides regular insight and food for thought.

smithery.com – A marketing and innovation blog that teaches marketers to 'Make Things People Want, rather than spend all their energy and resources trying to Make People Want Things'.

4.12 REFERENCES

Brilliant Noise, 2012. Brilliant Model: the Loyalty Loop. [Online]
    Available at: brilliantnoise.com/blog/brilliant-model-the-loyalty-loop/
    [Accessed 28 February 2022]

Burt, F., In: What is a brand? by Cheryl Burgess. [Online]
    Available at: www.bluefocusmarketing.com/2011/02/14/what-is-a-brand/
    [Accessed 24 May 2022]

Dowd, M., 2015. Case Study: Vectors of Disruption – The Uber Story. [Online]
    Available at: www.linkedin.com/pulse/vectors-disruption-uber-story-marc-dowd
    [Accessed 5 March 2022]

Houlder, V., 2016 Uber faces huge UK tax liabilities if drivers not 'self-employed'. [Online]
    Available at: www.ft.com/content/c7da2d92-a1c3-11e6-aa83-bcb58d1d2193
    [Accessed 5 March 2017]

Kaushik, A., 2022. Occam's Razor. [Online]
    Available at: www.kaushik.net/avinash/digital-marketing-and-measurement-model/
    [Accessed 24 May 2022]

Kokalitcheva, K., 2016. Uber Now Has 40 Million Monthly Riders Worldwide. [Online]
    Available at: fortune.com/2016/10/20/uber-app-riders/
    [Accessed 4 March 2022]

Kotler, P., 2012. What is marketing? [Online]
    Available at: www.kotlermarketing.com/phil_questions.shtml#answer3
    [Accessed 24 May 2022]

MindTools. Keller's Brand Equity Model. [Online]
    Available at: www.mindtools.com/pages/article/keller-brand-equity-model.htm
    [Accessed 24 May 2022]

Noesis Marketing, 2011. Building a Brand Pyramid. [Image] [Online]
    Available at: www.noesismarketing.com/building-a-brand-pyramid
    [Accessed 28 February 2022]

Porter, M., 2008. The Five Competitive Forces That Shape Strategy in *Harvard Business Review*, January 2008,
    p86–104.

Statista, 2022. [Online]. Hours of video uploaded to YouTube every minute as of February 2020.
    Available at: www.statista.com/statistics/259477/hours-of-video-uploaded-to-youtube-every-minute/
    [Accessed 15 March 2022]

4.13 FIGURE ACKNOWLEDGEMENTS

Figure 4.1: noesismarketing.com/building-a-brand-pyramid

Figure 4.2: brilliantnoise.com/blog/brilliant-model-the-loyalty-loop/#more-3873 (2018)

Figure 4.3: www.mindtools.com/pages/article/keller-brand-equity-model.htm

Figure 4.4: Adapted from Porter, 2008

Figure 4.6: Adapted from Kaushik, 2010

Figure 4.7: www.vets-now.com (2018)

Vets Now logo: www.vets-now.com
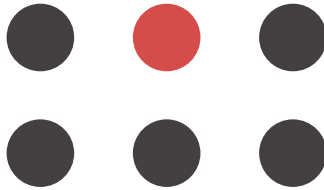
CLAIMING

INTRODUCTION TO CLAIMING

Claiming your space in the digital marketing arena requires that you know your customer and understand their desires, needs, and how they will access your service or product. One of the most important benefits of digital marketing is the availability of data. This data can be collected, analysed, and used in numerous ways to not only increase reach and engagement with your customer, but also to improve their overall experience.

Search engine optimisation (SEO) puts your product or service directly in the path of a potential customer. SEO helps people understand what is relevant, popular, and important. It tells customers that they can trust your brand. SEO is one of the more effective tools that you must get to grips with if you take digital marketing seriously. **Chapter 5: Search engine optimisation** focuses on how search engines work and deliver results, how to plan and implement an effective keyword strategy, and techniques for link building.

Once you have drawn customers in, you want them to have a good experience. The process of UX is clearly linked to the customer journey; good UX will make your customer return, and likely recommend your brand. Good user experience design (UX) is easier than people think and does not require fancy software; it simply requires that you understand some web design fundamentals and that you consider your customers' user journey from start to finish. **Chapter 6: User experience design** helps you recognise and create usable and enjoyable experiences.

With the UX principles in place, you can focus on web design. A good website is essential for successful digital marketing, and for staking your claim in customers' hearts, minds and (ultimately) encouraging them to open their wallets. **Chapter 7: Web development and design** provides insight into how the web development process works, and how you can assess the effectiveness and quality of your web development. There are many tools available to help you create clear, crisp, attractive, and effective websites without needing to spend a fortune or employ a designer.

Tied into web design are the principles of ecommerce. This encompasses all digital transactions. Increasingly, customers are choosing to shop, pay, travel, and sell using some form of ecommerce. **Chapter 8: eCommerce** introduces the concepts B2C, B2B, C2C, and C2B ecommerce models, and how these can be leveraged for success. It is also important to release that there are different channels for ecommerce. Understanding your customer (refer back to **Planning**) will help you know whether you should employ traditional ecommerce, or if it will be better to use m-commerce or s-commerce.

You will be guided through the five steps of setting up an ecommerce website, and the principles you should follow to ensure that customers can easily find you, easily find what they are looking for, and once they do, (most importantly) easily click 'Pay'.

05

SEARCH ENGINE OPTIMISATION (SEO)

In this chapter, you will learn:

- How search engines work and how they deliver results
- How to plan, research, and implement an effective keyword strategy across text and other content
- About techniques for link building, an essential aspect of SEO
- How specialised search, such as mobile, social, and local search can affect your rankings and how to optimise for these
- About Core Web Vitals
- What SEO for apps is all about.

5.1 INTRODUCTION

With millions of people performing billions of searches each day to find content on the internet, Google alone processes over 40 000 searches per second (Internet Live Stats, 2017). It makes sense that marketers want their products to be findable online. Search engines, the channels through which these searches happen, use closely guarded algorithms to determine the results displayed.

Determining what factors these algorithms take into account has led to a growing practice known as search engine optimisation (SEO).

SEO is the practice of optimising a website to achieve the highest possible ranking on the search engine results pages (SERPs). Someone who practices SEO professionally is known as an SEO (search engine optimiser).

Google uses about 200 different factors in its algorithm to determine relevance and ranking (Dean, 2016). None of the major search engines disclose the elements they use to rank pages, but there are many SEO practitioners who spend time analysing patent applications to try to determine what these are.

> **NOTE**
>
> Take a look at this speculative list of Google's 'On-page' (on your website) and 'Off-page' (not on your website) ranking factors from MOZ.
>
> On-page factors
>
> moz.com/learn/seo/on-page-factors
>
> Off-page factors
>
> moz.com/learn/seo/off-site-seo

Other types of websites that rely on search, like YouTube and Facebook, have their own algorithms. Facebook's Newsfeed algorithm, for example, uses around 100 000 factors to rank and sort content that appears in users' newsfeeds.

SEO can be split into two distinct camps: white hat SEO and black hat SEO.

1. **White hat SEO:** This refers to working within the parameters set by search engines to optimise a website for better user experience. Search engines want to send users to the website that is best suited to their needs; white hat SEO should ensure that users can find what they are looking for.

2. **Black hat SEO:** This refers to attempts to game the search engines. These SEOs use dubious means to achieve high rankings and their websites are occasionally blacklisted by search engines. Black hat

> **NOTE**
>
> If you want to know more about white and black hat SEO, you can read this article: semrush.com/blog/white-hat-seo

SEO techniques may have short-lived gains in some cases. However, the risk of penalties from the major search engines, especially Google, make such SEO techniques not worth it in the end.

5.2 KEY TERMS AND CONCEPTS

Table 5.1

Term	Description
Alt text	Also called 'alt tag.' The 'alt' attribute for the IMG HTML tag. It is used in HTML to attribute a text field to an image on a web page, normally with a descriptive function, telling a search engine or user what an image is about and displaying the text in instances where the image is unable to load.
App store optimisation (ASO)	The process of optimising mobile and web applications to improve the organic visibility of these 'apps' in specific web stores' search results in which they are distributed, as well as their visibility in general search engines like google.co.za.
Backlink	All the links from pages on external domains pointing to pages on your own domain. Each link from an external domain to a specific page is known as an inbound/backlink. The number of backlinks influences your ranking, so the more backlinks the better.
Canonical	Refers to a definitive URL in SEO. The canonical version is the definitive version.
Domain name	The easy-to-read name used to identify an IP address of a server that distinguishes it from other systems online: our domain name is redandyellow.co.za.
Heading tags	Standard elements used to define headings and subheadings on a web page. The number indicates the importance. H1 tags are viewed by spiders as being more important than H3 tags. Using target keywords in your H tags is essential for effective SEO.
Homepage	The first page of any website. The homepage gives users a glimpse into what your site is about. It is similar to the index in a book or contents page in a magazine.
HyperText Markup Language (HTML)	Used to structure the information and features within a web page.
Hyperlink	A link in an electronic document that allows you, once you click on it, to follow the link to the relevant web page.
Internal link	A hyperlink on a website that points from one page to another on the same website/domain.
Internet Protocol (IP) address	A unique number that is used to represent every single computer in a network.
Keyword frequency	The number of times a keyword or key phrase appears on a website.

Key phrase	Two or more words that are combined to form a search query. It is usually better to optimise for a phrase rather than for a single word.
Keyword rankings	Where keywords or phrases targeted by SEO rank in search engine results. If your targeted terms do not appear on the first three pages, start worrying.
Landing page	Where the page a user reaches when clicking on a paid or organic search engine listing. The pages that have the most success are those that match up as closely as possible with users' search queries.
Link	A URL embedded on a web page. If you click on the link, you will be taken to that page.
Link bait	A technique for creating content that is specifically designed to attract links from other web pages.
Meta tags	Tell search engine spiders exactly what a web page is about. It's important that your meta tags are optimised for the targeted keywords. Meta tags are made up of meta titles, descriptions, and keywords.
Referrer	The site a user has left after clicking on a link to another site. Most browsers log the referrer's URL in referrer strings. This information is vital in determining which queries are being used to find specific sites.
Robots.txt	A file written and stored in the root directory of a website that restricts the search engine spiders from indexing certain pages of the website.
Search engine spiders	Programs that travel the web, following links and building up the indexes of search engines.
Universal Resource Locator (URL)	A web address that is unique to every page on the internet.
Usability	A measure of how easy it is for a user to complete a desired task. Sites with excellent usability fare far better than those that are difficult to use.
XML sitemap	A guide that search engines use to help them index a website, which indicates how many pages there are, how often they are updated, and how important they are.

5.3 CORE PRINCIPLES

In order to understand how to use SEO to your advantage, it's important to understand what it is and how it works. Remember that data is one of the most powerful tools at your disposal. SEO is just one way to utilise the data that you collect.

5.3.1. Understanding SEO

Search engines need to help users find what they're looking for. To do this, they list the best or most relevant results first. Search engines typically rank results based on signals such as popularity, authority, relevance, trust, and importance.

SEO, also called organic or natural optimisation, involves optimising websites to achieve high rankings on search engines for certain selected keywords without the use of Google Ads. Generally, techniques used for optimising on one search engine will help efforts across others.

> **NOTE**
> Want to see how search works? Check out this resource from Google: www.google.com/insidesearch/howsearchworks/thestory

SEO can be divided into two main strategies:

> **NOTE**
> A good place to keep track of Google search algorithm updates is this handy resource from Moz: moz.com/google-algorithm-change

1. **On-page optimisation:** This is achieved by implementing changes to the HTML code, content, and structure of a website, making it more accessible to search engines, and by extension, easier for users to find.
2. **Off-page optimisation:** This is generally focused on building links to the website and covers activities like social media and digital PR.

SEO is an extremely effective way of generating new business to a site. It is a continuous process and a way of thinking about how search engines see your website and how users use search engines to find your website. It's search psychology.

Consider that SEO stands for 'Search Experience Optimisation' because search engines want to promote the visibility of websites that they determine provide the best experience for users. The best experience refers to how user-friendly the website is and how well the website's content meets users' needs, as well as enhancing other factors to convince search engines.

SEO is a fairly technical practice but it can easily be broken down into five main areas:

1. A search engine-friendly website structure
2. A well-researched list of keywords
3. Content optimised to target those keywords
4. Link popularity
5. User insights.

5.3.2 Search engine-friendly website structure

Search engines encounter two kinds of obstacles:

1. Technical challenges that prevent the search engine spider from accessing content
2. A competitive marketing environment where everyone wants to rank highly.

Technical challenges

To ensure that search engines can access your content, you must remove technical barriers. There are certain best practices that you can use to achieve optimum results.

The key is to make sure that there are direct HTML links to each page you want the search engines to index. The most important pages should be accessible directly from the homepage of your website.

The information architecture or, how content is planned and laid out, has important usability and SEO implications. Users want to find what they are looking for quickly and easily, while website owners want search engine spiders to be able to access and index all applicable pages. Google consistently points out that it wants users to have a good user experience. Content relevance, user engagement, and user experience are all crucial to SEO (Martin, 2016).

> **NOTE**
> Read more about user experience in **Chapter 6: User experience design.**

There are times when user experience and SEO can be at odds with each other but, usually, usable, accessible websites are search engine-friendly as well.

Another technical challenge to search engines is Flash. For the most part, search engines struggle to crawl and index Flash sites. There are some workarounds, but the best approach from an SEO perspective is to avoid building sites or delivering key content using Flash. Instead, use HTML5, which provides similar interactivity and visuals, while remaining easily crawlable.

> **NOTE**
> **Chapter 7: Web development and design** delves more deeply into designing and building a search engine-friendly website.

5.3.3 Voice search

As digital marketers, we must evolve with the times to stay effective. The 'no interface trend' refers to the way people want new, natural forms of interaction with technology. Consider Stephen Sandmann's (2016) observation that, "Speech, gesture, touch and sight: truly intuitive technologies are set to transform your customer interactions forever".

When people think of SEO, they usually think of only the traditional type of SEO, based on desktop and mobile Google search. SEO has evolved to be mobile-centric, which now includes voice search.

Many consumers use Google search on their mobile phones to find answers to their everyday questions. This means that you can encourage your consumers to engage with your brand via voice search-accessed mobile search. The Google app allows a person's voice to access mobile Google search results on their smartphones. Google voice search is part of Google Assistant in all of the latest Android smartphones and Google Home devices.

Other voice search tools include Amazon's Alexa, Apple's Siri, Microsoft's Cortana, and Facebook's Hey Facebook.

Voice searches are usually made through mobile devices because of their on-the-go convenience factor, which means that the mobile context will generally apply. This has the following implications:

• User behaviour relating to voice search differs from traditional mobile search. This may seem obvious, but you have to make a conscious effort to accommodate voice search in your mobile SEO strategy.
• In most cases, voice searches appear in the form of questions, such as, "What movies are showing at Brooklyn Mall?"
• Voice-derived search queries are usually longer than the average traditional search query.
• Companies can develop 'voice actions' into their applications to take advantage of voice.

These differences should be factored into your content by adding local keywords that are geographically relevant and by writing content that answers common questions that your intended audience may ask.

Make sure your website's content is the best at answering popular questions; it may appear as 'Featured Snippets' above the usual search results, which the relevant search engine will read out.

The future

Google Assistant is incredibly intuitive; it is a Google voice search that has contextual awareness. When you search using Google Assistant, it scans your phone's screen and recent activities to help give it context for your search, thereby better answering your query to fill in the gaps of a vague search request. Google also makes use of a personal index of what you do on your Android phone as a means of learning more about you.

Siri and other voice search platforms are making major headway in terms of technological advancements and additional predictive features. Voice search is here to stay and will become more widely used going forward.

5.4 IMPLEMENTATION

How do you start building your keyword list? It requires a little thought and a fair amount of research and insight, using tools that are readily available to help you grow and refine your list of keywords.

5.4.1 SEO and keywords

Keywords are the very foundation of search. When users enter a query on a search engine, they use the words they think are relevant to the search. The search engine then returns those pages it has calculated to be most relevant to the words searchers use and, increasingly, the implied meaning of the search. When you optimise your content around words and phrases that people search for, your website can rank higher for those terms.

Developers of search engines have built a sophisticated understanding of semantics and the way in which we use language. So, if a user looks for 'car rental', the search engine will look for pages that are relevant to 'car rental', as well as synonyms like 'car hire', 'vehicle hire', and so forth. Search engines have also built up knowledge around common misspellings, typos, synonyms, and related searches.

Cheap Car Hire, Best Rental Prices | Rentalcars.com
www.rentalcars.com/za/ ▾
Compare car hire deals and find the cheapest prices in over 49000 locations ...

Contact Information. Book Online Today - Rentalcars.com!
www.rentalcars.com/za/contact/ ▾
Find our address and contact details to manage your booking or; contact our ...

Budget Car Rental and Vehicle Hire in South Africa
www.budget.co.za/ ▾
Car rental network located throughout South Africa, Botswana, Namibia and Mozambique.

Cape Town Car Rental - Cheap Deals - Sixt Rent A Car
https://www.sixt.com › Worldwide › South Africa ▾
Cheap **Car Rental** in Cape Town South Africa ✓ Book today and save with Sixt rent a car in Cape Town ✓ Prepay & get up to 20% off.

Avis Rent a Car - Car Rental Specials | Car Hire in South Africa
https://www.avis.co.za/ ▾
For premium car hire at affordable prices look no further that Avis South Africa. Find great **car rental** rates in Johannesburg, Cape Town and Durban now.

Figure 5.1 Google delivers search results for logical synonyms

It is crucial that you implement keywords that are likely to be used by target audiences. Websites need to appear when potential customers are searching for them. A large part of keyword research is understanding search psychology. When we build our keyword lists, we are tapping into the mental process of searchers and putting together the right mix of keywords to target.

> **NOTE**
> Keyword or key phrase? These are usually used interchangeably to refer to single or multiple words used for optimising websites. We largely use 'keyword' in this book, but they are essentially the same.

There are four things to consider when choosing a keyword:

1. **Search volume:** How many searchers are using that phrase to find what they want? For example, there is an estimated monthly search volume of over 338 million for the keyword 'hotel', but an estimated 6 600 searches per month for 'Cape Town Waterfront hotel'.

> **NOTE**
> If you're researching keywords using the Google AdWords Keyword Planner, note that it reports only on paid search volume, not on total volume, and Google has made access more difficult for free accounts.

2. **Competition:** How many other websites out there are targeting that same phrase? For example, Google finds over 2 900 000 000 results for 'hotel', but only 640 000 for 'Cape Town Waterfront Hotel'.

3. **Propensity to convert:** What is the likelihood that the searcher using that keyword is going to convert on your site? A conversion is a desired action taken by the visitor to your website. Related to propensity to convert is the relevance of the selected term to what you are offering. If you are selling rooms at a hotel at the V&A Waterfront, which of the two terms – 'hotel' or 'Cape Town Waterfront hotel' – do you think will lead to a higher rate of conversions?

4. **Value per lead:** What is the average value per prospect attracted by the keyword? Depending on the nature of your website, the average value per lead varies.

Look at the differences in results based on keywords used. Both show terms used by someone wanting to book a hotel in Cape Town, but it is expected that someone looking for a luxury hotel is intending to spend more. That means that this particular lead has a higher value, particularly if you have a hotel booking website that offers a range of accommodation.

Figure 5.2 An example of how keywords give different results

Step-by-step keyword research

Keyword research helps you to produce a repeatable content process that consistently earns traffic over time.

Step 1: Brainstorm

- Your primary focus should be on users' needs from all potential aspects and contexts, not jamming or stuffing your website content full of certain keywords.
- Offer users clarity in the form of descriptive content that features relevant vocabulary and terminology. Depending on how popular jargon is with the intended audience, avoid jargon in some cases.
- Be mindful of US English and UK English spelling. This can make a difference in terms of a word's popularity in search engines.

- What would users unfamiliar with your company name search for when looking for your company's product or services? Leave it to Google Ads to target competitors' specific keywords, like their names.
- Think about the words you would use to describe your business and about the questions or needs of your customers that it fulfils. How would someone ask for what you are offering? Consider synonyms and misspellings, as well.

  - Bear in mind that people may not ask for your services using the same words that you use to describe them. You may sell 'herbal infusions', whereas people may ask for 'herbal teas' and some might even request a 'tisane'.
  - Even common words are often misspelt and you may need to consider common misspellings and typos, for example, 'morgage'.

Showing results for get a *mortgage*
Search instead for get a morgage

1. Clean Up Your Credit.
2. Pre-Qualification and Pre-Approval. To get a good idea of how much you can borrow, a lender can pre-qualify you for a mortgage. ...
3. Lenders, Lenders Everywhere. ...
4. Time to Shop.

Mortgage Basics: How To Get A Mortgage | Investopedia
www.investopedia.com/university/**mortgage**/**mortgage**7.asp

People also ask

How long do you have to work to get a mortgage?

Can you get a mortgage if you are in debt?

How much of a deposit is needed for a mortgage in Ireland?

How much deposit do I need for a mortgage 2016?

Feedback

Mortgage Basics: How To Get A Mortgage | Investopedia
www.investopedia.com/university/**mortgage**/**mortgage**7.asp ▾
Clean Up Your Credit. Pre-Qualification and Pre-Approval. To **get** a good idea of how much you can borrow, a lender can pre-qualify you for a **mortgage**. Lenders, Lenders Everywhere. Time to Shop.

Figure 5.3 Google returns relevant results even for common misspellings

Step 2: Gather data

Two ways in which to gather accurate keyword data are to survey customers and to look at your website referral logs.

Look at what terms customers are using to find you and add those to your list. If they are already sending you some traffic, it is worth trying to increase that traffic.

> **NOTE**
>
> Misspellings are important, but consider what these tell you about the traffic you're getting. Analyse this traffic to ensure that you're getting quality and relevant visitors.

Step 3: Use keyword research tools

There are several tools available for keyword discovery and some of them are free. Some tools will scan your website and suggest keywords based on your current content. Most will let you enter keywords and will then return suggestions based on past research data, along with:

- Similar keywords
- Common keywords used with that keyword
- Common misspellings
- Frequency of the keywords in search queries
- Industry-related keywords
- Keywords that are sending traffic to your competitors
- How many sites are targeting your keywords.

See **5.8 Tools of the trade** for some resources that you can use.

Bearing in mind the factors that make a good keyword, you need to aim for the right mix of keywords. Low-volume terms with low levels of competition may be a good way to get traffic in the short term, but don't be scared off by bigger competition in the high-value, high-volume areas. It may take longer to get there, but once you do, the revenue can make it worthwhile.

It is a good idea to create a spreadsheet of the list of keywords, along with additional information about each one.

Table 5.2 A spreadsheet of targeted keywords for reference

Keyword or phrase	Search volume	Competition	Propensity to convert	Value of lead
Hotel	3,870	90%	2%	$18
Luxury hotels	345	80%	35%	$35

This will help you to choose the right keywords to target. These lists should be created for the whole website and then be broken down for each page you want to optimise.

Optimising content for keywords

Once keywords and phrases are selected, we need to ensure that the site contains content to target them. You must confirm that the content is properly structured and that it sends relevant signals. Content is the most important part of your website. Create relevant, targeted content aimed at your selected keywords. Remember, search engines can recognise context and implied meaning, so synonyms are important.

Content has several roles to play on your site:

- It must provide information to visitors.
- It must engage with them.
- It must persuade them to do what you want.

Content must also send signals of relevance to search engines. You need to use the keywords on the content page in a way that search engines will pick up and users will understand.

> **NOTE**
>
> Try it now: Pick one of the tools listed in **Section 5.8** and try a little of your own keyword research. Can you discover any useful keywords that your favourite brand should be using?

Previously, each web page used to be optimised for a set number of keywords. With the increasing sophistication of search engines and their semantic awareness, however, pages are now optimised for themes instead. This means that search engines have moved from keywords to concept and context. For example, one page might be optimised for car insurance, with relevant keywords used as required, while another page might be optimised for health insurance, or household insurance.

Search engines consider context in three ways:

1. **User intention:** Google tries to match your query to what you are asking rather than the individual words used. A search for 'book about children stranded on island' gives you *Lord of the Flies* by William Golding as a result, rather than a page with those specific keywords.

Figure 5.4 Google relates concepts to each other

2. **Your content:** Google reads your pages' keywords to find out what they are about, conceptually.
3. **Relating concepts:** Google relates concepts to each other, like showing William Golding as author of *Lord of the Flies* and offering results that are related to the book and the story of children stranded on an island.
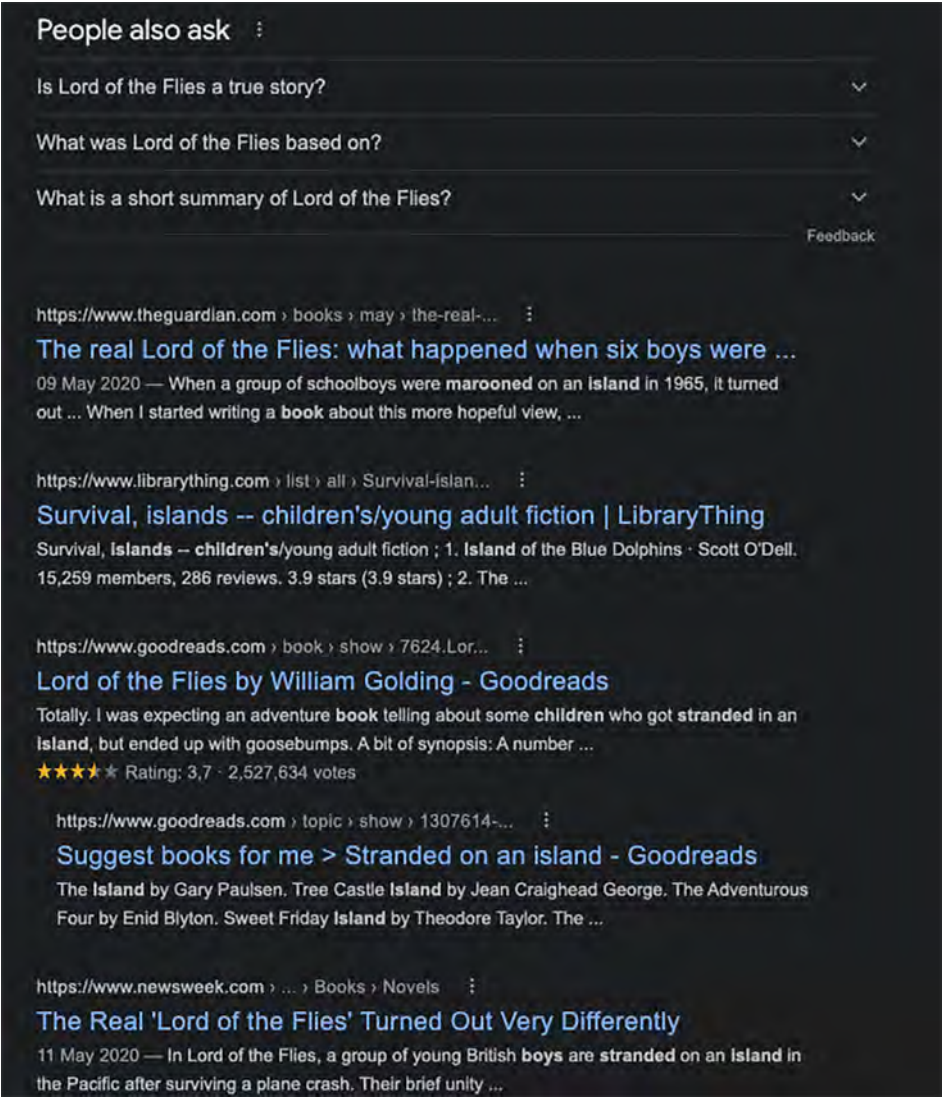
Figure 5.5 How Google relates concepts to each other

While keywords are still useful, focus has shifted from repeatedly using keywords to ensuring that each page is about something specific. Even though you should be thinking 'customer first' rather than exact keywords, these terms are still useful. Here are some guidelines:

1. **Title tag:** Use the keyword in the title and as close to the beginning as possible. Be mindful that this needs to offer readers clarity and promote users to click through to your website as well.
2. **H1 header tag:** Use the keyword in the header tag, and as much as possible, in the other H tags, as long as it makes sense to do so from a readability perspective.
3. **Body content:** Use keywords as long as it makes sense in context. Remember to use synonyms rather than focusing exclusively on one specific version of a keyword. You should aim for as much content as needed in terms of its purpose. Start off with the information that is most commonly needed or searched for. Then, add more content to provide additional information together with sub-headings to give it needed structure. About 350 words of content should be a minimum. Make sure the content is original and insightful with excellent flow and structure.
4. **Bold:** Use <strong> tags around the keyword at least once.
5. **URL:** Try to use the keyword in your page URL.
6. **Meta description:** Use it at least once in the meta description of the page, which should also entice users to click through to your site from the SERP.
7. **Link anchor text:** Try to ensure that the keyword is used in the anchor text of the pages linking to other pages within your website (internal linking) and third-party websites that link to your website. Anchor text provides additional context to search engines and can also be included in sitelinks (the additional links seen within a website's search result for some search queries).

Optimising media

Images, video, and other digital assets should be optimised with the relevant keywords. Search engines cannot decipher multimedia content as effectively as text, so they rely on the way that media is described to determine what it is about. Screen readers read out these descriptions, which can help visually impaired users make sense of a website. In addition, media such as images and video are often also shown on the SERPs. Proper optimisation can give a brand more ownership of the SERP real estate and can be used effectively to target competitive terms.

Ensure that media usage doesn't hinder a website's performance, for example, how quickly a website page loads. Also, users are mobile data sensitive. Auto-playing website videos are usually unpopular, especially if users are using the internet at the office or in a public place.

Media should not obstruct users when they visit a website page, for example, a pop-up video shouldn't cover the whole screen.

NOTE
Read more about this in **Chapter 12: Content creation: Video.**

Just as rich media can help emphasise the content on a page to a visitor, they can help search engines to rank pages, provided they are labelled correctly.

Here are some ways to optimise images with keywords for SEO:

*   Use descriptive, keyword-filled filenames.
*   Use specific alt tags and title attributes.
*   Add meta information to the image. Make sure this information is relevant.
*   Use descriptive captions and keep relevant copy close to the corresponding media. For example, an image caption and neighbouring text will help to describe the content of the image.
*   Make sure that the header tags and images are relevant to each other.
*   Think about what other digital assets you have and whether these can be optimised in line with your keyword strategy. For example, consider using app store optimisation (ASO). ASO is the process of optimising your mobile and web apps for the specific web stores, such as Google Play Store, App Store, and Huawei AppGallery.

> **NOTE**
> Find out how to optimise your apps in **Chapter 16: Direct marketing: Email and mobile.**

Title: Handmade bags for a quirky, one-of-a-kind style

H1 Header Tag: Customised Handmade Bags to Suit Your Style

Body copy: Here, descriptive and compelling copy about how handmade bags will make anyone a style maven, what the benefits are to the community that makes the bags, and how distinctive tailor-made bags will make the owner feel. Text should be written in a logical, easy-to-follow fashion. You could also highlight the designers of the hand-sewn bags and how their personality shows in their work.

Alt Attribute for Photo: Distinctive Handmade Bags in Many Colours

Figure 5.6 An example of a page targeting the theme 'handmade bags'

The best way to ensure results is to focus on writing quality content while sticking to a few guidelines on tags and URLs. Remember, you want high-ranking content that is interesting and engaging for readers.

> **NOTE**
> As search engines become ever more sophisticated and user focused, creating entertaining and readable copy is more important than simply including keywords in your text.

Regularly adding fresh, valuable content will also encourage search engines to crawl your site more frequently.

Use your website and its pages to establish and reinforce themes. Information can always be arranged in some kind of hierarchical structure. Just as a single page can have a heading and then be broken down into subheadings, a large website can have main themes that are broken down into sub-themes. Search engines will see these themes and recognise your website as one with rich content.

5.4.2 Link popularity

Links are a vital part of how the internet works. The purpose of a link is to allow a user to go from one web page to another. Search engines, mimicking the behaviour of humans, also follow links.

Besides allowing search engine spiders to find websites, links are a way of validating relevance and indicating importance. When one page links to another, it is as if that page is voting or vouching for the destination page. Generally, the more votes a website receives, the more trusted it becomes, the more important it is deemed, and the better it will rank on search engines.

Links help send signals of trust. Signals of trust can come only from a third-party source. Few people will trust someone who says, "Don't worry, you can trust me!" unless someone else, who is already trusted, says, "Don't worry, I know him well. You can trust him." It is the same with links and search engines. Trusted sites can transfer trust to unknown sites via links.

Links help to validate relevance. The text that makes up a text link can help validate relevance. A link such as 'Cape Town hotel' sends the message that, "You can trust that the destination site is relevant to the term 'Cape Town hotel.'" If the destination web page has already used content to send a signal of relevance, the link simply validates that signal.

The parts of a link

Here is an example of the HTML code for a link:
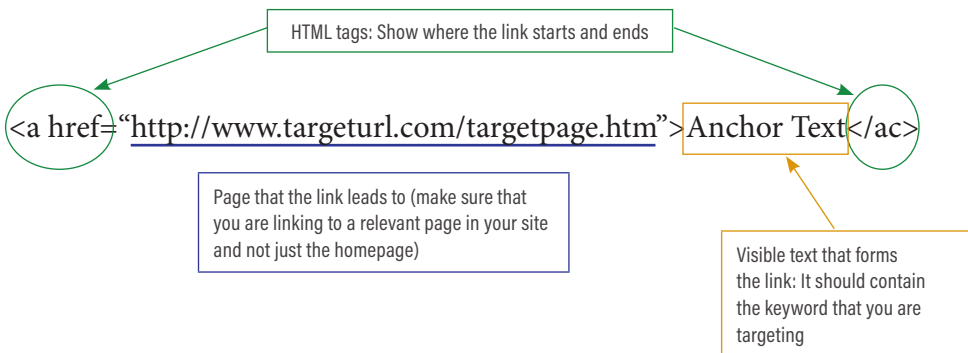
Figure 5.7 The HTML code for a link

The link sends a signal that the target URL is important for the subject used in the anchor text.

There can be a lot more information included in this anatomy, such as instructions telling the search engine not to follow the link, or instructions to the browser on whether the link should open in a new window or not.

Anchor Text

rel="nofollow" can be included in links when you don't want to vouch for the target URL. Search engines do not count nofollow links for ranking purposes. This was introduced by Google to try to combat comment spam.

Not all links are created equal

Of course, not all links are equal. While link volume is the number of links coming to a specific page of your site, link authority looks at the value of the links. Some sites are more trusted than others. Likewise, some sites are more relevant than others to specific terms. The more relevant a site, the more value is transferred by the link.

It is more important than ever to avoid your website being associated with spammy links of any kind. 'Quality' links are better than a high 'quantity' of 'poor-quality' links.

Well-known and established news sites, government sites (.gov), and university domains (.ac) are examples of sites from which links can carry more weighting.

Sites with higher authority carry more link weight.

Figure 5.8 Links from universities and government bodies carry more weight

Search algorithms also consider relationships between linked sites. By analysing various elements, search engines try to determine if the links are natural links, or if they are manipulative, artificial links created solely for ranking purposes.

> NOTE
>
> Discussion: Why are government and university websites considered to have more authority? What sorts of websites would they be likely to link to?

Manipulated links are worth very little compared to natural links and may even lead to a drop in search engine rankings. Penguin, the Google algorithm update that focused on reducing spammy links, was released in 2012.

The search engine algorithm will also determine the relevancy of the referring website to the site being linked to. The more relevant the sites are to each other, the better.

Also keep in mind that linking to valuable, relevant external resources can help to improve the visibility of your own site. When you add trustworthy and relevant website links to your content, it improves the credibility of your website.

External linking is similar to the way you cite sources in a bibliography for an academic paper; it shows that you've created your content based on sound research.

How does a website get more links?

With links playing such a vital role in search engine rankings and traffic for a website, everyone wants more of them. There are certainly dubious means of generating links, most of which can result in penalties from the search engines. However, here are some ways for ethical and honest website owners and marketers to go about increasing links to their websites:

Create excellent, valuable content that others want to read

If people find your site useful, they are more likely to link to it. It is not necessary (or possible) to try to write content that will appeal to the whole of the internet population. Focus on being the best in your industry and in providing value to the members of that community. Make sure that valuable content is themed around your keywords.

Create content that relevant, important websites would like to share and link to own their own. Writing excellent original content is time consuming, so make it work for you.
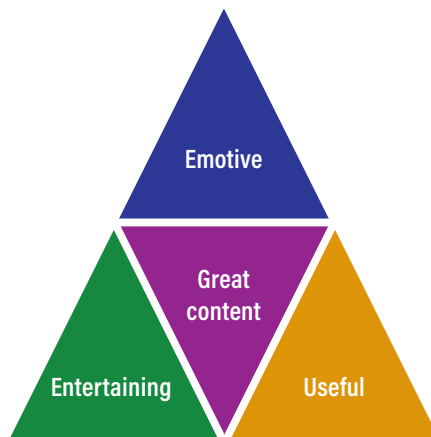
Figure 5.9 Ensure that you create remarkable, valuable content that people want to link to

Infographics are visual and graphic representations of data that can encourage lots of traffic and inbound links. They are a popular type of content that is useful to users.

Create tools and documents that others want to use

Interview experts in your field and host those interviews on your website. Create useful PDF guides for your industry that people can download from your site. Think outside the box for quirky, relevant items that people will link to. Calculators are popular tools, and we don't just mean the ones that add two and two together. For example, a company that offers car finance can have a calculator so that people get an idea of the costs involved, as well as an easy route

to apply. Wesbank's website includes various calculators, including one that can calculate an estimated monthly repayment based on information that a customer inputs. Similarly, Property24 has a bond calculator that helps potential buyers to estimate their bond repayments over a selected number of months.

Create games

Creating a game that people want to play is a great way to generate links. Make sure that the theme of the game is based on the keywords for your website so that when others talk about and link to the game, they are using your keywords.

Capitalise on software and widgets

Widgets, browser extensions, and other software that users love to use, all help to generate links for a website. For example, the TripAdvisor widget enables hotels, attractions, restaurants, destination marketers, and bloggers to add TripAdvisor content, such as reviews, awards, and local area attractions to their website. Whitegrass, a popular fine-dining restaurant in Singapore, uses widgets for Instagram, Facebook, and TripAdvisor in the bottom-right corner.

> Be creative! The best link-building strategies are those that provide value and automate the linking process as much as possible. The easier it is for someone to share your link, the more likely they are to do it.

Competitor analysis

You can find out who is linking to your competitors, and which non-competing sites are ranking highly for your keywords. Use this information to identify sites to target for link requests.

Until January 2017, using Google search along with the 'link:' command could be used to find these links and websites. Now, a better alternative is to use the data in your Google Search Central account, formerly known as Webmaster tools. Learn more here: google.com/webmasters.

You can also use paid tools that provide link index data, such as:

- majestic.com
- linkresearchtools.com
- ahrefs.com
- moz.com/link-explorer.

With all link-building tactics, make sure to use your keywords when communicating. You will be telling people how to link to you and ensuring that search engines notice your authority.

NOTE

You can think of backlinks as votes. The more high-quality links that point to your website, the higher you'll be able to rank on Google, which will help you drive more organic traffic to your website (Barker, 2022).

5.4.3 User insights

Search engines want their results to be highly relevant to web users, to make sure that web users keep returning to the search engine for future searches. And how do you establish what is relevant to users? By looking at how they use websites, of course!

User data is the most effective way to judge the true relevance and value of a website. For example, if users arrive on a website and leave immediately, chances are it wasn't relevant to their query in the first place. However, if a user repeatedly visits a website and spends a long time there, it is probably extremely relevant. When it comes to search engines, relevant, valuable sites are promoted, and irrelevant sites are demoted.

How do search engines access this data?

Search engines use cookies to maintain a history of a user's search activity. This will include keywords used, and websites visited from the search engine. Search engines gather data on the clickthrough and bounce rates of results.

Site speed, that is, the performance of your website, is one of the contributing factors to ranking in Google (Dean, 2016). This is becoming increasingly important, especially since Google switched to a mobile-first indexing in 2020, which prioritises a website's mobile experience from a Google perspective. Check out Google's PageSpeed tool to help analyse your site's performance. It will recommend ways to improve your site's speed and mobile-friendliness: developers.google.com/speed/pagespeed/.

You may think your website is mobile-friendly or it has a mobile-friendly version as part of a responsive website build, but is it genuinely mobile-friendly? Does your website tick all of the mobile-friendly boxes? For example: How fast does your website load compared to its competitors? How long do visitors have to wait before they can engage with the site? Are your images rendering correctly? Is your layout responsive? Think of this: Your website starts loading in 3 seconds, but the main interactive parts have only loaded 20 seconds later. That's poor user experience and will certainly increase your bounce rate and therefore limit any desired customer interaction. It's important to look at the entire user experience from start to finish and not just at face-value. Remember to prioritise how the underlying mechanics affect it.

In 2021, Google took this a few steps further with the roll out of their use of Core Web Vitals to influence rankings.

Core Web Vitals are essential to getting it right. But what are they? These are among the foremost important signs of a webpage that Google can measure in terms of the user experience. If any are failing, Google will penalise you. You can generally group them into three easy-to-understand categories:

1. **Website loading performance:** How long does it take for the website to start loading? Do elements load at different intervals?

2. **Interactivity of the website:** How long does someone have to wait before they can interact with it fully?
3. **Visual stability of a website:** How stable is the website when you are reading/interacting with an article? Does the text drop halfway down the screen because something has just loaded?

Initial page load speed might be an obvious one, but delving deeper into all the other elements that affect usability and interactivity are often overlooked.

Lighthouse offers a useful Chrome browser extension tool to measure a website's Core Web Vitals and how you can fix any issues, as well: chrome.google.com/webstore/detail/lighthouse/blipmdconlkpinefehnmjammfjpmpbjk?hl=en.

Google's AMP project also underlines the importance of site speed for users and thus to Google themselves (and therefore, of course, to your SEO). Accelerated Mobile Pages (AMP) essentially simplifies HTML, CSS, and JavaScript elements to serve stripped-down pages containing only the most essential elements to mobile users. This leads to anything from a 15% to an 85% improvement in site speed (Chung, 2015).

So, what does this mean for SEO? When it comes to a website, it must:

• Be valuable enough to attract both visitors and links naturally
• Retain visitors and make sure they return to the website
• Convert visitors.

Social and search

Social information is playing an ever-increasing role in search. Social content, such as Twitter messages or YouTube videos, can appear in the SERPs, and there is a growing indication of social influence on search rankings.

There are four social factors to consider for social and search:

1. Use social media properties to dominate brand SERPs

When someone searches for your brand name, you can use your social media properties to 'own' more of the results on that page, reducing the likelihood that a user will end up on a competitor's website instead. Use your brand name when naming Twitter and Instagram profiles and Facebook and YouTube pages.

It is worthwhile mapping out where your brand has a presence and making sure that these all align. Not only will this ensure that you can plan to dominate SERPs, but it will also benefit your overall brand cohesion. Remember to optimise campaign-specific pages for campaign-related wording to make it easier for users to find.

Coca-Cola - Home

www.**coca-cola**.co.za/ ▾

Coca-Cola South Africa. Facebook · Twitter · YouTube · RSS · Country (ZA). United States ... **Coca-Cola**. **Coca-Cola**, Fanta, Sprite. **Coca-Cola**; Fanta; Sprite ...

Career Opportunities

Each associate of The-Coca-Cola Company helps lead our ...

Contact us

Coca-Cola South Africa. Facebook · Twitter · YouTube · RSS ...

More results from coca-cola.co.za »

Coca-Cola (@CocaCola) · Twitter

https://twitter.com/CocaCola 🐦

Redemption tastes so sweet, amirite? Congrats @ClemsonFB! #AllIn pic.twitter.com/DFxQzHG…

6 days ago · Twitter

Figure 5.10 A Google search for Coca-Cola turns up several social media profiles

2. Social links as signals of relevance

Links from social sites such as Twitter include 'rel=nofollow'. However, there is a strong indication that these links are, in fact, followed by search engines, and are used to determine relevance. If you focus on creating great content on your site and making sure that it is easy to share socially, you should see results in your SEO efforts.

3. Personalised results influenced by your online social network

If you are logged in to a social network while searching, such as Facebook for Bing or your Gmail account for Google, you could see results from or influenced by your social circles. In Bing, for instance, results can include indications of what your friends have previously liked or shared via Facebook. On Google, you may be more likely to see a friend's blog for relevant searches.

4. Optimisation for social search engines

Google is the biggest search engine world-wide, YouTube is the second largest and Facebook is growing. Even within social properties, users still depend on search tools and features to find the content they are looking for. Content that is housed on these properties should be optimised for the relevant social search engine as well.

Mobile search

As web-enabled mobile devices continue to grow in the market, and become easier to use, mobile search remains a key growth area. Mobile searches tend to be different to desktop searches. They are more navigational in nature, as users tend to know where they want to end up, and users are often looking for concise, actionable answers.

Most online searches are conducted using mobile devices. It is essential that this is as easy as possible for your potential customer. People search online while they stand in queues, at their desks at work – no place is sacred!

The need for a website that performs well on mobile became crystal clear in 2015, when Google made what is called the mobilegeddon update. Following this update, sites that perform well on mobile are given higher rankings, while sites that do not perform well on mobile are penalised.

> You can find a good overview of mobile SEO and how to create a website easily accessible via mobile here: developers.google.com/webmasters/mobile-sites/mobile-seo/.

Mobile search input can also be different from desktop search. As well as typing in search keywords, mobile users can search by voice or by using images or scanning barcodes.
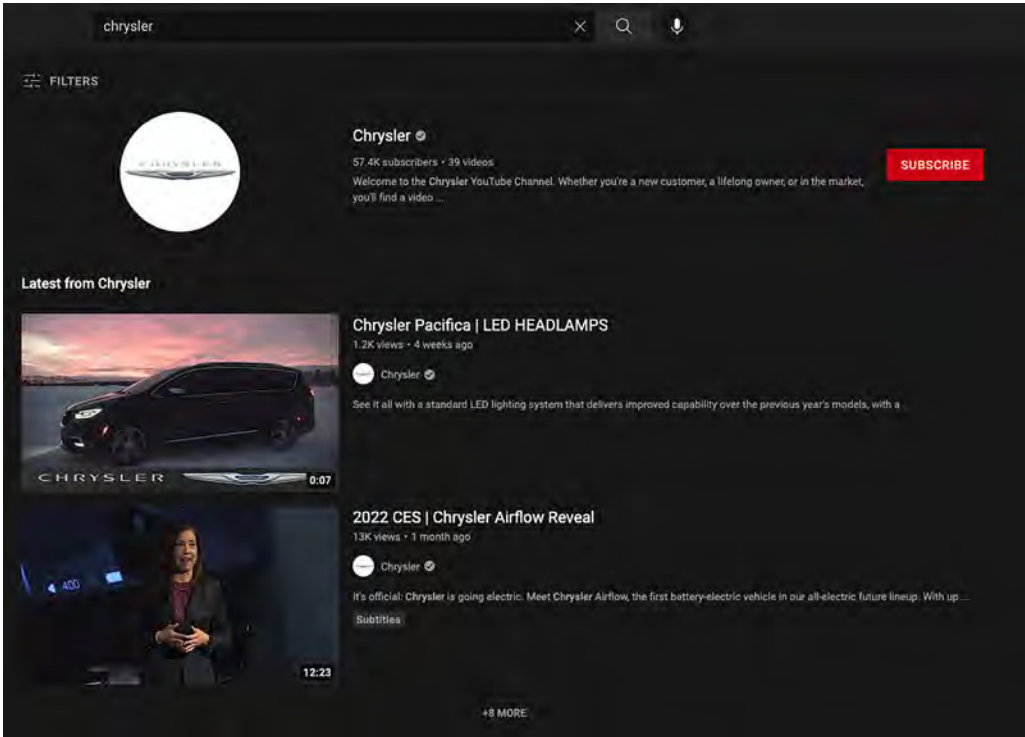
Figure 5.11. A YouTube search for 'Chrysler' turns up
official branded videos in the top positions

As with mobile web development, mobile SEO is a little different from desktop SEO, although the fundamental principles remain the same. Mobile search engine optimisation is impacted

> **NOTE**
> Read more about this in **Chapter 7: Web development and design.**

by the location of the user, the size of their screen, and the device's operating system. It can be frustrating to users if they have to zoom in to read the text, can't click on buttons, or otherwise have to struggle to find information on your site. Build usable and accessible sites with great content, and you've already come a long way towards a flawless viewing experience.

Differences in approach for mobile SEO are largely because:

- Search engines have the ability to deliver precise location-based results to mobile users
- Usability is critical in sites for mobile devices
- Search engines have less data to work with compared to traditional web in terms of site history, traffic, and inbound links.

The fundamentals of mobile SEO are not so different to those of desktop SEO:

NOTE

Discussion: Why is usability so important for mobile SEO?

1. A usable, crawlable site is very important

Build mobile versions of your website that cater for mobile users that prioritises simple navigation and stripped-down content.

2. Content is important and should be formatted for mobile usage

Text and images should be optimised for the mobile experience, so no large file sizes! Metadata still matters and titles and descriptions are what users see in the SERPs.

3. Links are important

You should link to your mobile site from your desktop site and vice versa. Submit your mobile site to relevant mobile directories.

4. Submit a mobile XML sitemap

Mobile-specific sitemaps use the same protocols as standard XML sitemaps, with the addition of a mobile tag.

5. Use the word 'mobile' on the mobile website, or use mobile top-level domains

Make it explicit to search engines that this is the mobile version of your website, and they are more likely to prioritise it as such.

Local search

Local search refers to search behaviour and results where location matters. Either results returned are local in nature, or results returned can be map based.

With blended SERPs, map-based results can be returned together with other types of results, depending on the type of search. As search engines become more sophisticated, location can be inferred and therefore, influence the types of results.

A user may search for 'plumber london', for example, and the search will know to return results for London plumbers. These may even be returned on a map.

However, a user in London may search just for 'plumber'. The search can infer from the user's IP address that the user is in London and still return results for London plumbers, since someone searching for this term is likely to be looking for a nearby service. Location is one of a number of factors that help Google to provide useful and relevant search results for people, such as traffic and weather info.
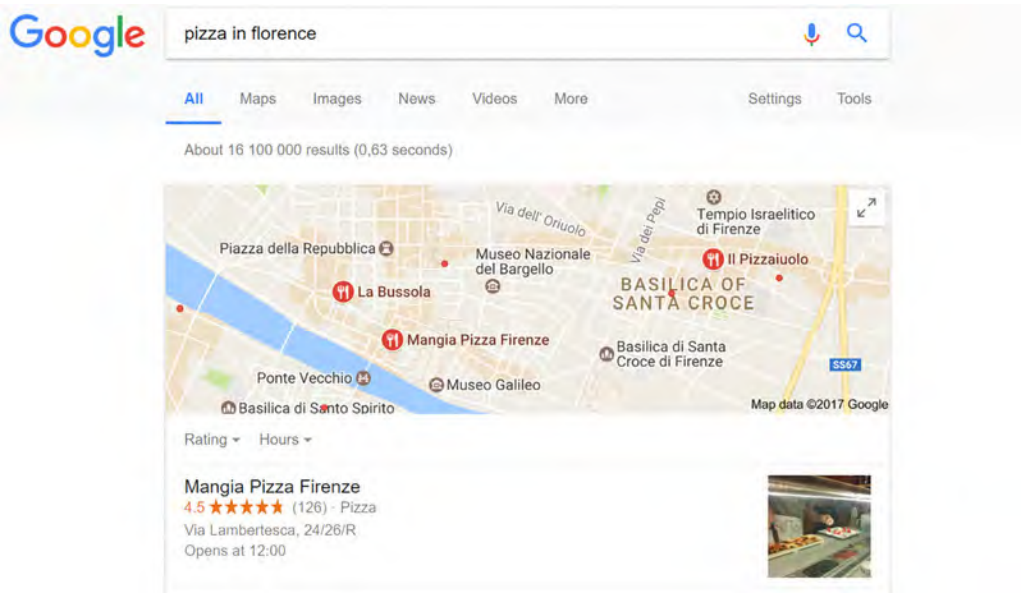
Figure 5.12 A Google search for 'pizza in Florence' turns up a range of location-based results displayed on a map

For search engines to return location-relevant results, they need to know the location of elements being searched. This is often determined from sites that include the name and address of a business. Note that this site may not be yours. Location results are often determined from various review sites, and the results can include some of those reviews.

Search engines also allow businesses to 'claim' their locations. For example, Google's Google My Business function allows small businesses to enter their information. These details will then populate into all Google services. A business can set up a local or a brand page on Google which, once completed, will give them access to various page-management and optimisation tools and make them more visible on SERPs.

> **NOTE**
>
> Find the Small Business Guide to Google My Business here: www.simplybusiness.co.uk/microsites/google-my-business-guide/ This step-by-step guide helps you to get set up and optimise results.

Many of the searches people perform on their phones today are location-based; customers are looking for businesses around them to meet their needs in that moment. Your brand should be right there in the search results.

Figure 5.13 A Google search for a specific business reveals its local page in the SERP

5.5 SEO FOR APPS

App store optimisation provides a similar function for apps as SEO does for websites and follows some of the same principles.

Consider:

* Is your app relevant for a particular search query?
* Is it a user-friendly app that doesn't crash often?
* Does it have great reviews?

Reviews are a cost-effective way to generate large numbers of organic app downloads and to increase the frequency of overall downloads, especially between app-promoting paid media campaigns.

Here are more tips:

* Make sure your app is always running as well as it should and that it is delivering on its promises.
* Never incentivise users to leave positive reviews.
* Follow all necessary guidelines to avoid your app being removed from the relevant web/app stores.
* Make sure to use all available features in your app's web store page listings, from titles to screenshots. Android apps may benefit from link-building.
* Be sure to set up 'App Indexing' for your Android app, which will increase its visibility in Google Search in some instances.
* ASO is most beneficial for apps that may be searched for by generic, non-brand-specific search queries.

> **NOTE**
>
> **Google Play Store**
>
> Make sure that your app meets Google's latest requirements. Regularly check: android-developers.googleblog.com/2021/04/updated-guidance-to-improve-your-app.html.
>
> Be sure to follow Google Play Store's guidelines for your app's store listing: play.google.com/console/about/storelistings/.
>
> **App Store**
>
> Make sure that you follow Apple's guidelines for your app: developer.apple.com/app-store/product-page/.

* ASO doesn't stop with improving an app's visibility. It should also make the best use of the improved visibility. So, like any website page, your app store pages must perform their required outcomes as best as possible.
* Ensure that you respond to reviews in a useful manner. Assist users and provide informative, helpful information (app titles, short descriptions, long descriptions, promotional text, etc.). Include engaging screenshots, an eye-catching app icon, and a video (that meet all requirements).
* Like SEO, with ASO it is essential that you always meet all app/web store guidelines. Be sure to stay up to speed on updates from Apple, Google, and other stores when applicable.

5.6 WHAT NOT TO DO

Black hat SEO refers to practices that attempt to game the search engines. If a search engine uncovers a website using unethical practices to achieve search engine rankings, it is likely to remove that website from its index.

> **NOTE**
>
> You can find the latest guidelines for webmasters for 2022 here: hevodata. com/learn/google-webmaster-guidelines/.

Google publishes guidelines for webmasters, available through Google's Search Central. As well as outlining best practice principles, Google has supplied the following list of tips:

- Avoid hidden text or hidden links.
- Don't use cloaking or sneaky redirects.
- Don't send automated queries to Google.
- Don't load pages with irrelevant keywords.
- Don't create multiple pages, subdomains, or domains with substantially duplicated content.
- Don't create pages that include malicious behaviours, such as phishing or installing viruses, trojans, or other malware.
- Avoid 'doorway' pages created just for search engines or other 'cookie cutter' approaches, such as affiliate programmes with little or no original content. If your site participates in an affiliate programme, make sure that your site adds value. Provide unique and relevant content that gives users a reason to visit your site first.
- Avoid link farms and focus on attracting quality, valuable links.

The bottom line is this: Design websites for users first and foremost, and don't try to trick the search engines. It will only be a matter of time before they uncover your black hat techniques.

5.7 ADVANTAGES AND CHALLENGES

Optimising a website for search engines should entail optimising the website for users. Done properly, it should result in a better user experience, while ensuring that search engines index and rank the website well.

It can be tempting to focus on the technicalities of SEO and to forget that both robots and humans need to read the same website. One should not be sacrificed for the other.

Search engines update their algorithms regularly. Each update is an attempt to improve search results, but can result in loss of rankings for some websites, depending on the update. A contingency plan, such as a pre-prepared search advertising campaign, needs to be in place to cope with a sudden drop in rankings.

As with any digital marketing practice, SEO should not be the only focus of digital marketing efforts. It works best when part of a holistic online marketing strategy.

The SEO community is constantly sharing insights about search algorithms. Whenever a new one is released, do some research on the best ways to avoid being penalised.

5.8 TOOLS OF THE TRADE

There are a number of tools available to assist with SEO. Some are made available by search engines, and some are developed by agencies and individuals who specialise in SEO. Most are available for free.

Google Search Central

google.com/webmasters

Google provides guidelines to webmasters, as well as tools to help ensure your website is being indexed.

Open Site Explorer

moz.com/researchtools/ose

Moz provides a useful tool called Open Site Explorer, which can help you determine the value of links from particular sites.

Tools from SEOBook

tools.seobook.com

SEOBook provides a number of tools that assist any SEO. For example, Rank Checker is a Firefox extension that allows you to save a number of keywords and to perform regular searches on them, giving you the ranking of your chosen URL for each keyword in the search engines selected. They also have tools to help with keyword discovery.

Keyword discovery tools

There are a number of tools available, some free and some paid for, to assist with keyword discovery. Some include:

Google Ads Keyword Planner

adwords.google.com/keywordplanner

Trellian's Keyword Discovery tool

keyworddiscovery.com

Wordtracker

wordtracker.com

Microsoft Keyword Planner Tool

about.ads.microsoft.com/en-us/solutions/tools/keyword-planner

Link-Assistant.Com

link-assistant.com

Online forums

Webmaster World (webmasterworld.com) is frequented by SEOs and webmasters aiming to stay current with latest trends and search engine updates.

Google Merchant Center

google.com/merchants

The Google Merchant Center allows you to mark up any products you sell through eCommerce, ensuring that they also rank for relevant search results.

MozBar

The Moz SEO toolbar (moz.com/products/pro/seo-toolbar) gives instant metrics while viewing SERPs or web pages.

Screamingfrog

Screamingfrog (screamingfrog.co.uk/seo-spider) allows you to crawl website URLs and analyse the onsite SEO.

AWR

AWR (advancedwebranking.com) gives you access to rankings for desktop, mobile, and local searches.

5.9 CASE STUDY: THE CONTAINER STORE

The Container Store®

The Original Storage and Organization Store®

The Container Store group has brick-and-mortar stores, as well as an online store that delivers internationally.

One-line summary

By working with a company with expertise in SEO and focusing on SEO for their online store, The Container Store saw an increase in organic traffic to their website, which helped to build an online presence beyond their brick-and-mortar-stores.

The problem

The Container Store has a well-established retail presence; their brick-and-mortar stores are very popular in the home organisation space. However, even though The Container Store was the only US-based retailer solely focused on home organisation, they did not have a particularly impressive ecommerce presence.

Prior to hiring an SEO manager, The Container Store did not have a content marketing strategy, nor did they pay much heed to organic traffic. This meant that they were overspending on driving traffic to their website. They needed a solid website development and marketing strategy to attract customers.

The solution

The Container Store brought in a dedicated SEO to help it grow the ecommerce side of the business. The company began working with BrightEdge, an SEO platform, which allowed them to strategise and control their web presence.

The strategy included creating page groups populated with logical keywords and on-page recommendations. The SEO team also took a more active role in content management to drive traffic to the site, as well as HTML tagging. Additionally, BrightEdge allowed for the mapping of backlinks to target new sources of links.

The results

A seven-month campaign led to an increase in the authority of the site, as well as:

*   30% increase in keywords in first rank position
*   93% increase in traffic
*   68% increase in conversions.

5.10 CASE STUDY QUESTIONS

1. Describe The Container Store's transition from primarily bricks-and-mortar to having a successful online presence. Refer to the use of SEO in your answer.
2   Was it necessary for The Container Store to hire an SEO manager in order to improve the company's online presence?
3. Why did the SEO manager take an active role in content development and management to help to improve the SEO results?
4. Why was it important to increase the number of organic page visits?
5. Do you think search engine algorithms can help businesses become better at what they do?

5.11 THE BIGGER PICTURE

Search engine optimisation can be influenced and enhanced by most other digital marketing campaigns, and they should all be approached with this in mind.

SEO and content marketing go hand in hand, since SEO relies on fresh, relevant, and popular content, and content marketing can be informed by SEO keywords and insights.

For example, search advertising campaigns can provide valuable keyword research, which can then be fed into an SEO strategy. Social media marketing can generate an enormous number of links to a website. Digital PR aims to generate links too, and these can be optimised for search engines.

User research and web analytics can generate insights into how users find the website, which can inform SEO strategy, and effective SEO techniques can provide insights into user behaviour.

5.12 SUMMARY

The average website receives a significant proportion of its traffic from search engines, the gateway to the internet, highlighting the importance of SEO. SEO specialists need to constantly find ways to extract more value as they are not only competing with competitors' websites but also Google Ads (paid results). At first glance, to the untrained eye, paid results are increasingly less distinguishable from organic listings. Also, organic search listings used to have a monopoly on imagery in some search results. However, Google Ads' image extensions and Shopping Ads now draw more of users' attention away from organic search results.

There are two types of search results:

1. Organic or natural results
2. Paid results.

SEO aims to improve a website's ranking in the organic results. Search engine optimisation is a fairly technical practice, but it can easily be broken down into five main areas:

1. A search engine friendly website structure
2. A well-researched list of keywords
3. Content optimised to target those keywords
4. Link popularity
5. User insights.

Growing trends in SEO include the influence of social content on search results, mobile SEO, and local search. Google is placing more and more emphasis on a mobile-first approach. Start sketching and prototyping the smallest screen first and work your way up to larger screens. Essentially, it's about delivering the right user experience to the right device.

5.13 CHAPTER QUESTIONS

1. Why do links send signals of trust to search engines?
2. Why is it better to have more niche pages of content than fewer pages that cover a lot of content?
3. How can analysing the links to a competitor's website help aid your own link building strategy?
4. Why is it important for search engines to keep updating their algorithms?
5. If metadata are no longer used for ranking purposes, why do they still have an important role in SEO?

5.14 FURTHER READING

BrightEdge. n.d. Container Store Increases Organic Traffic Revenut 96% in 7 Months. [Online]
Available at: www.brightedge.com/resources/case-studies/the-container-store
[Accessed 11 February 2022].

moz.com – Moz provides regular articles, guides, and blog posts covering all things SEO. As well as sharing insights from their own SEO efforts, there are vibrant forums where you can learn from others.

seobook.com – Aaron Wall's SEObook.com provides training and tools for SEO, as well as regular articles and posts.

webmasterworld.com – a forum for webmasters, from beginners to those who've been around. It is a great resource for a budding SEO.

5.15 REFERENCES

Barker, S., 2022. The Only Link Building Strategies You need in 2022. [Online]
Available at: shanebarker.com/blog/link-building-strategies/
[Accessed: 22 May 2022]

Chung, K., 2015. Google's AMP Project: what will be the impact on publishers? [Online]
Available at: www.searchenginewatch.com/2015/10/16/googles-amp-project-what-will-be-the-impact-on-publishers
[Accessed 11 May 2022].

Dean, B., 2016. Google's 200 Ranking Factors: The Complete List. [Online]
Available at: backlinko.com/google-ranking-factors
[Accessed 11 May 2022].

Digital Training Academy, 2016. SEO Case Study: Lloyds Pharmacy Online Doctor boosts organic search. [Online]
Available at: www.digitaltrainingacademy.com/casestudies/2016/10/seo_case_study_lloyds_pharmacy_online_doctor_boosts_organic_search.php
[Accessed 11 May 2022].

Internet Live Stats, 2017. Google Search Statistics. [Online]
Available at: www.internetlivestats.com/google-search-statistics
[Accessed 11 May 2022]

Martin, J., 2016. Top 6 SEO ranking factors of 2016. [Online]
Available at: www.cio.com/article/238795/top-6-seo-ranking-factors-of-2016.html
[Accessed 11 May 2022].

Milligan, A., 2020. White Hat SEO: How To Rank by the Rules. [Online]
Available at: www.semrush.com/blog/white-hat-seo
[Accessed: 11 May 2022]

Sandmann, S., 2016. Digital Marketing Innovation with Google Voice Search. [Online]
Available at: www.searchenginecompany.co.za/digital-marketing-innovation-google-voice-search
[Accessed 11 May 2022].

5.16 FIGURE ACKNOWLEDGEMENTS

Figure 5.1: Screenshot, Google search, 2017

Figure 5.2: Google search result, 2022

Figure 5.3: Google search result, 2017

Figure 5.4: Google search result, 2022

Figure 5.5: Google search result, 2022

Figure 5.6: Stokes, 2013

Figure 5.10: Google search result, 2017

Figure 5.11: Screenshot, Chrysler YouTube, 2022

Figure 5.12: Google search result, 2017

Figure 5.13: Google search result, 2017

The Container Store logo: containerstore.com

06

USER EXPERIENCE DESIGN

In this chapter, you will learn:

- How to think about web projects with a UX mindset
- How to recognise and create usable and enjoyable experiences for desktop and mobile users
- About the nuts and bolts of implementing UX strategy step-by-step
- About a variety of awesome UX tools.

6.1 INTRODUCTION

Have you ever visited a website that was confusing, with broken links and long, rambling text? Or have you had a web experience that just worked, where everything was clear, easy, and enjoyable to use? If so, you've encountered the extremes of user experience design. Excellent UX can delight and convert customers. Bad UX can lead to lost revenue and a decrease in repeat visitors.

In practice, great UX can differ based on the audience and context. The principle remains the same: make it easy for your users to find what they need and to convert to your desired goal. UX is the first, foundational step of an effective digital asset.

6.2 KEY TERMS AND CONCEPTS

Table 6.1

Term	Description
Above the fold	The content that appears on a screen without a user having to scroll.
Accessibility	The degree to which a website is available to users with physical challenges or technical limitations.
Breadcrumbs	Links, usually on the top of the page, that indicate where a page is in the hierarchy of the website.
Call to action (CTA)	A phrase written to motivate the reader to take action, such as sign up for our newsletter or book car hire today.
Content audit	An examination and evaluation of existing content on a website.
Content strategy	In this context, a plan that outlines what content is needed for a web project and when and how it will be created.
Convention	A common rule or tried-and-tested way in which something is done.
Conversion	Completing an action or actions that the website wants the user to take. A conversion usually results in revenue for the brand in some way. Conversions include signing up to a newsletter or purchasing a product.
Credibility	In this context, how trustworthy, safe, and legitimate a website looks.
Fidelity	An interface design. A low-fidelity prototype will be basic, incomplete, and used to test broad concepts. A high-fidelity prototype will be quite close to the final product, with detail and functionality, and can be used to test effectiveness and usability.

Information architecture	The way data and content are organised, structured, and labelled to support usability.
Navigation	How a web user interacts with the user interface to navigate through a website; the elements that assist in maximising usability and visual signposting so users never feel lost.
Prototype	Interactive wireframes, usually of a higher fidelity, that have been linked together like a website, so that they can be navigated through by clicking and scrolling.
Responsive design	A design approach that enables a website display to change depending on the size of the viewport or screen, regardless of the device on which it is displayed.
Search engine optimisation (SEO)	The process of improving website rankings on search engine results pages.
Sitemap	On a website, a page that links to every other page in the website and displays these links organised according to the information hierarchy. In UX terminology, this is the visualised structural plan for how the website's pages will be laid out and organised.
Usability	A measure of how easy a system is to use. Sites with excellent usability fare far better than those that are difficult to use.
User-centred design (UCD)	The design philosophy where designers identify how a product is likely to be used, taking user behaviour into consideration and prioritising user wants and needs. UCD places the user at the centre of the entire experience.
User experience design (UXD)	The process of applying proven principles, techniques, and features to create and optimise how a system behaves, mapping out all the touchpoints a user experiences to create consistency in the interaction with the brand.
User interface (UI)	The user-facing part of the tool or platform, i.e. the actual website, application, hardware, or tool with which the user interacts.
Wireframe	The skeletal outline of the layout of a web page. This can be rough and general, or very detailed.

6.3 UNDERSTANDING UX DESIGN

User experience (UX) can be defined as all the experiences, physical, sensory, emotional, and mental, that a person has when interacting with a digital tool.

As illustrated below, online UX can be divided into two broad categories — functional and creative.

UX

Functional UX

This covers elements of the user experience that relate to actually using the tool, such as working technical elements, navigation, search, and links.

Creative UX

This is the bigger, harder to define impression created by the tool. The so-called 'wow' factor that covers visual and creative elements.
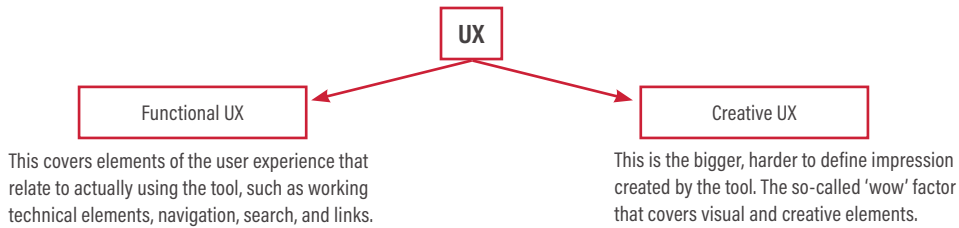
Figure 6.1 Online UX is divided into two broad categories

There are six qualities that make up good UX:

1. **Findability:** Can I find it easily? Does it appear high up in the search results? How long does it take me to find something on the site? Does the three-click rule work on this site?

> **NOTE**
> The three-click rule suggests that a user should be able to access what they need from your site with no more than three mouse clicks.

2. **Accessibility:** Can I use it when I need it? Does it work on my mobile phone or on a slow internet connection? Can I use it as a disabled person?
3. **Desirability:** Do I want to use it? Is it a pleasant experience, or do I dread logging in?
4. **Usability:** Is it easy to use? Are the tools I need intuitive, and easy to find?
5. **Credibility:** Do I trust it? Is this website legitimate?
6. **Usefulness:** Does it add value to me? Will I get something out of the time I spend interacting with it?

6.3.1 The benefits of UX

There are some real, tangible benefits to applying UX design to digital marketing strategies.

Good UX is an excellent way to differentiate your brand in the market and give yourself a competitive advantage. If your online touchpoints are easy, intuitive and awesome to use, your customers won't have any reason to look elsewhere.

Good UX research and design allows you to find the best solution for your needs.

Every business, website and online service is unique in some way, which means that the way it is constructed, must be unique too.

Amazon's $300 million button is perhaps the most dramatic example of how a simple UX fix can impact the business. Amazon managed to gain an extra US$300 million worth of sales simply by changing their 'Register' button to one that read 'Continue' instead. The number of customers increased by 45% because they no longer felt they needed to go through an onerous registration process simply to fulfil a basic shopping action. In fact, nothing else about the purchase process had changed (Spool, 2009)!

Every marketer knows that the ideal customer is a happy customer. Customers who love the experience you give them will become loyal clients, and possibly brand evangelists.

Applying UX principles allows you to get your digital tools working earlier, with much better functionality, at a lower cost. You can cut out features and elements that you simply don't need and focus on the core user experience. This optimised development process in turn leads to sites that are easier and cheaper to maintain, upgrade, and support across multiple platforms.

6.4 CORE PRINCIPLES OF UX DESIGN

UX should make using your website simple. However, that does not mean that it's simple to design a site that offers an excellent user experience. There are a few core principles that you can consider.

6.4.1 User-centric design

While this may seem like the most obvious point, it's surprising how often the user is forgotten in the user experience. Business owners, marketers, and web developers frequently focus on creating the web platforms they want and think are best, instead of really interrogating what the user needs. When the design process is driven only by internal business needs, the performance of the web assets is compromised. Making sure that each department has a space that it controls, often comes at the expense of what the user needs.

When designing for the user, you need to ask the following questions:

- Who is the user?
- What are the user's wants and needs from your platform?
- Why is the user really coming to your website?
- Where is the user most likely to be in their customer journey when they visit your site?
- What are the user's capabilities, web skills, and available technology?
- How can the site facilitate the customer journey to conversion and purchase?
- What features would make the user's experience easier and better?

> **NOTE**
> The customer journey is introduced in **Chapter 4: Strategy**. It refers to the steps your customer takes when engaging with your brand.

The answers to these questions will come out of user research, as discussed in **Chapter 3: Market research**.

Of course, many users may not know exactly what their wants and needs are. It is the UX practitioner's job to discover these through research and interpret them in the best way possible. Keep Henry Ford's famous quote in mind here: "If I had asked people what they wanted, they would have said faster horses."
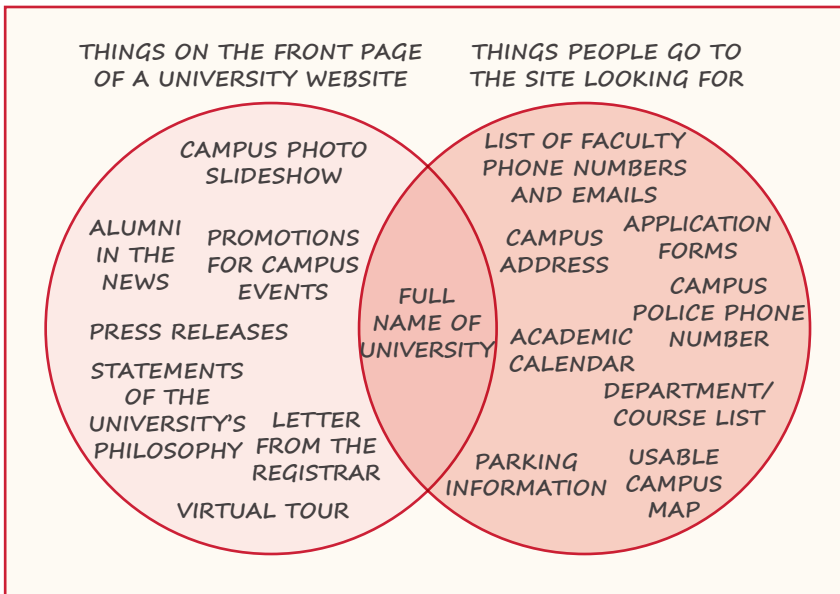
Figure 6.2 It's essential to give users exactly what they need

Mobile users

When discussing user-centric design, whatever you have learned about the user context must be considered. Today more than half of web traffic originates from a mobile device, with users accessing the internet through either a smartphone or tablet (Think with Google, 2016). In 2021, the number of unique mobile internet users stood at 4.32 billion, indicating that over 90% of the global internet population use a mobile device to go online. Therefore, designing for mobile must be a priority.

The context of mobile users affects the way in which they use their devices. Mobile users are:

- **Goal orientated:** Mobile users turn to their mobile devices to answer a question, quickly check email, find information, or get directions. They often have a distinct purpose in mind when using their phone.
- **Time conscious:** There are two aspects to this. On the one hand, mobile users are often looking for urgent or time-sensitive information such as the address of the restaurant they are looking for, so answers should be available as quickly as possible. On the other hand, the mobile device is also frequently used to kill time or as a source of entertainment such as reading articles on the couch, or playing games while waiting in a queue, so content is also crucial. User research will tell you which of these groups your users fall into and how you need to structure your site accordingly.
- **Search dominant:** Even users who know what they are looking for tend to navigate there via search, for example, typing the brand name into Google, rather than accessing the page from a bookmark or typing the URL directly into the browser bar.

- **Locally focused:** According to Google search data 30% of all mobile searches are for location (Think with Google, 2016). Since mobile phones are always carried, users turn to them to find information about things in their surroundings, from local businesses to more detail on a product they have just seen.

> **NOTE**
> Some mobile users use their phones for browsing in a similar way one would use a desktop computer. How does your audience use their devices?

Usability is especially challenging with mobile. One of the biggest challenges is the sheer number of different device categories and models available. The OpenSignal report from 2015 identified 24 000 distinct android mobile devices, running a myriad of operating systems (OpenSignal, 2015).

The limitations of mobile create additional considerations for the UX designer to address in order to ensure that visitors have a pleasant user experience while visiting the site. These limitations include:

- **Small screens:** Even the largest smartphones have screens many times smaller than a standard laptop, and tablets fall somewhere between the two. This means that the user has a much smaller window through which to perceive and understand the website, so it may be difficult to get an overall impression of where things are or what's important. It is important to consider all devices when thinking about the design of your website or app.
- **Difficult inputs:** Mobile phones don't come with full-sized keyboards and mice, so they are usually a lot more difficult to operate fluidly and accurately than desktop computers. Touchscreens may be the exception here, although they also have their own pitfalls.

> **NOTE**
> One design approach puts 'content first'. This means that you should decide which content to provide on your site depending on whether users are viewing it from a mobile or a desktop computer, and then adapt the layout and material to that device.

- **Slow connection speeds:** Many mobile phone users, especially in developing countries, are on slow internet connections. Even fast options such as 4G can often be more sluggish than a desktop equivalent. This makes loading large websites or images slow and frustrating and can be expensive in terms of data costs.
- **Slow hardware:** Sometimes the slowness comes from the hardware itself. The more basic the phone, the slower its processing components are likely to be, making the simple act of opening the browser and loading a page time consuming.

There are three main approaches to creating mobile-accessible content.

> **NOTE**
> Read more about this in **Chapter 7: Web development and design**.

1. Mobile websites (called mobi sites)
2. Native and web applications (called apps)
3. Responsive websites (websites that adapt to the device).

6.4.2 Usability and conventions

Usability is about making the digital assets we build easy and intuitive to use. To paraphrase Steve Krug, don't make your users think: they should just do (Krug, 1997–2013).

One of the most important aspects of usability involves sticking to conventions, which are simply common rules or ways of displaying or structuring things on the web. Study Figure 6.3 below.

The logo in the top left-hand corner, which is linked to take the user back to the home-page.

Navigation menus at the top or left of the web page.

Search boxes placed at the top of the page, using standard wording such as 'search', or a magnifying glass icon.

Links that are underlined.
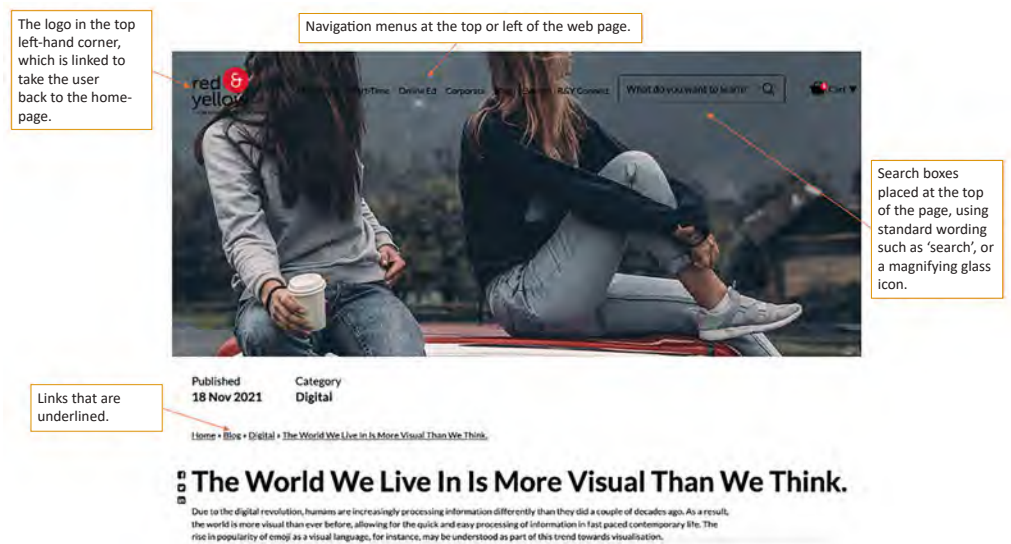
Figure 6.3 Website conventions

Ensure that all website elements, such as menus, logos, colours, and layout are distinct, easy to find and kept consistent throughout the site. There are some key 'don'ts' when it comes to building a user-friendly and usable website:

> **NOTE**
>
> Can you think of any other web conventions? How have these evolved over time, and how important is it to stick to the rules?

- Never resize windows or launch the site in a pop-up.
- Don't use entry or splash pages (splash pages are pages that site visitors encounter first before reaching the homepage).
- Never build a site entirely in Flash. While Flash can be optimised for search engines, the process is far more demanding than for an HTML site and is not recommended as best practice. Unaided, most search engine spiders cannot effectively crawl Flash sites, and will not work on many mobile devices.
- Don't distract users with 'Christmas trees,' such as blinking images, flashing lights, automatic sound, scrolling text, and unusual fonts.

And finally, while the following principles apply to desktop as well, they are especially valid for mobile:

- **Reduce loading time:** Try to keep content and actions on the same page. This ensures better performance because there are fewer page loads. Encourage exploration especially on touchscreens; users like to browse elements and discover. This makes them feel in control.
- **Give feedback:** Ensure that it is clear when the user performs an action. This can be achieved through animations and other visual cues.

> **NOTE**
>
> Some note the increasing presence of one-page websites, especially for sites with limited content and large images, which enables the site to load quicker. Check out this article that provides guidance on what types of sites should opt for one-page sites: www. webinsation.com/should-i-have-a-one-page-website. This approach is less effective in countries where data costs are prohibitive.

35% Download Music...   **35% Download Photos...**
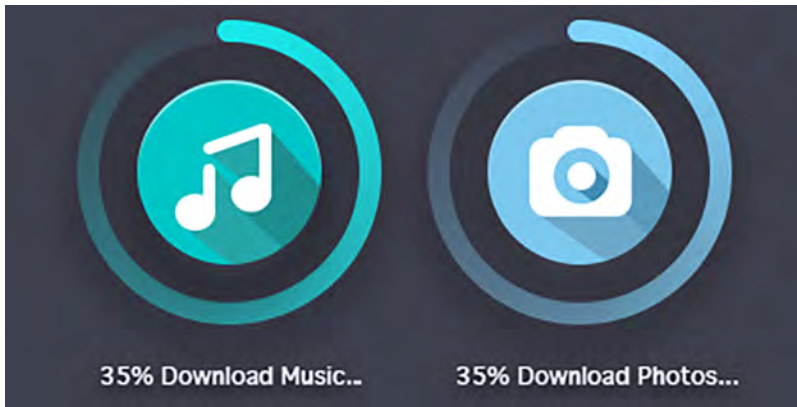
Figure 6.4 Animations providing feedback to the user of the action they have requested

- **Communicate consistently:** Ensure that you deliver the same message across all your touchpoints, for example, using the same icons on the website as you would on the mobile app prevents users from having to relearn how you communicate.
- **Predict what your user wants:** Include functionality such as autocomplete or predictive text. Remove as much manual input as possible to streamline user experience.

> **NOTE**
>
> Mobile users prefer to scroll in one direction.

It's useful to consider usability guidelines to ensure that your website is on track. StayInTech provides a usability checklist. www.scribd.com/document/412667252/StayInTech-Usability-UX-Checklist-2018.

6.4.3 Simplicity

In UX projects, the simpler option is almost always the more user-friendly one. Even if your service or product is complex, your customer-facing web portals need not be. In fact, it's important to remember that most customers want the most basic information from you, such as "What is this?" and "How does it work?"

Simplicity can mean several things:

Lots of empty space: In design terms, this is referred to as negative or white space. Of course, it need not specifically be white. Dark text on a light background is easiest to read. In general, the more effectively 'breathing room' is placed between various page elements, lines of text, and zones of the page, the easier it is for the user to grasp where everything is.

Fewer options: Studies have found that people faced with fewer choices generally choose more quickly and confidently, and are more satisfied with their decision afterwards (Roller, 2010).

Plain language: Unless your website is aimed at a highly specialised technical field, there's usually no need to get fancy with the words you use. Clear, simple, well-structured language is the best option when creating a great user experience.

> **NOTE**
> Read more about this in **Chapter 11: Content creation: Copy**.

Sticking to conventions: As we've said before, conventions are excellent shortcuts for keeping things simple for users. There's no need to reinvent the wheel and try to teach your users a whole new way of navigating a website.

Figure 6.5 The FreshBooks homepage is clean, simple, inviting, and easy to use

When it comes to mobile, it's even more important to simplify. Show information only when it's needed. While you should ensure that the mobile asset provides all the same information as the desktop equivalent, this doesn't need to be presented in the same format or volume.

6.4.4 Credibility

Credibility refers to how trustworthy and legitimate something looks, and is a big consideration for web users deciding whether to use your website or not. Here are some of the cues that visitors use to determine the credibility of a website:

- **Looks:** Does it look professional and beautiful?
- **Prominent, easy-to-locate phone numbers and addresses:** This assures the visitor that there are real people behind the website, and that they are easily reachable.
- **Informative and personal 'About us':** Some customers want to see the inner workings of a company and are interested in the head honchos. Consider including employee pictures and profiles to add personality to the site.
- **Genuine testimonials:** Testimonials are a great way to show potential customers what your current customers have to say about your organisation. Trust is vital, and this is one way to encourage it. Video testimonials can be particularly effective, assuming your audience does not face data restrictions.
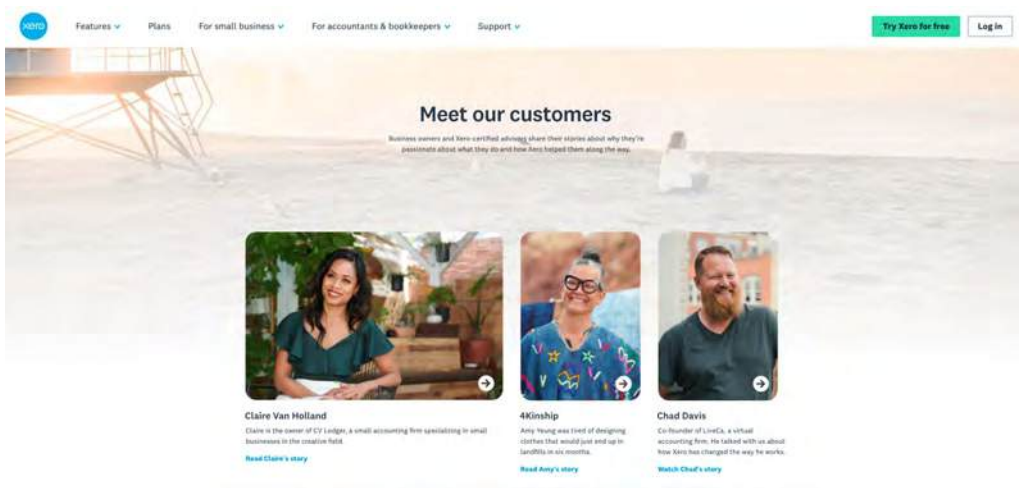
Figure 6.6 Genuine user testimonials can create a sense of credibility, like this example from Xero which includes text and video testimonials

- **eCommerce:** Using a reputable sales channel helps your website's credibility.
- **Social media:** Having a social media presence often goes further towards establishing credibility than testimonials, which could have been faked.
- **Logos of associations and awards:** If you belong to any relevant industry associations or have won any awards, feature them. Not only does this go a long way towards establishing your credibility; it will show that you're at the top of your game, a notch above the competition.
- **Links to credible third-party references or endorsements:** This is a way to assert your credibility without tooting your own horn.
- **Fresh, up-to-date content:** A news section that was last updated a year ago implies that nothing has happened since or that no one cares enough to update it.
- **No errors:** Spelling and grammar mistakes are unprofessional, and while the large majority of readers may not pick them up, the one or two who do will question your credibility. This extends to broken links, malfunctioning tools, and interactive elements that don't work as advertised.

6.5 IMPLEMENTING UX DESIGN

The UX design process happens before, during, and after the website is being built. It ties in very closely with strategy and research, web development and design, SEO, content strategy and creation, and later conversion optimisation.

As discussed in **6.4: Core principles of UX design**, mobile should not be an afterthought in UX or any other digital endeavour. It should be prioritised in strategy, design, and implementation. The 'mobile first' movement supports this notion, and aims to create mobile user experiences first, and then adapt these for the web (instead of the other way around). Designing this way has many advantages, since the principles of good mobile UX works just as well on full sites using simple designs, linear interfaces, and clear buttons and features.

6.5.1 Conduct research and discovery

Step one involves conducting detailed research on the business, the users, and the technology involved. This is covered fully in **Chapter 3: Market research** which includes user research. Doing this lets UX practitioners know exactly what they need to do to address the needs of the business and audience. This will generate a lot of data that needs to be filtered and organised.

6.5.2 Create the site's basic structure

Information architecture (IA) is about managing information, taking a lot of raw data, and applying tools and techniques to it to make it manageable and usable. Categories and pages should flow from broad to narrow. An intuitively designed structure will guide the user to the site's goals.

IA operates on both the micro and the macro level, covering everything from the way individual pages are laid out, for example where the navigation and headings are, to the way entire websites are put together.

Most websites have a hierarchical structure, which means there are broad, important pages at the top, and narrower, more specific and less important pages further down. Hierarchical structures can be very broad and shallow having many main sections with few lower pages or very narrow and deep, with few main sections and many pages below. It's up to the UX practitioner to find the right balance of breadth and depth.
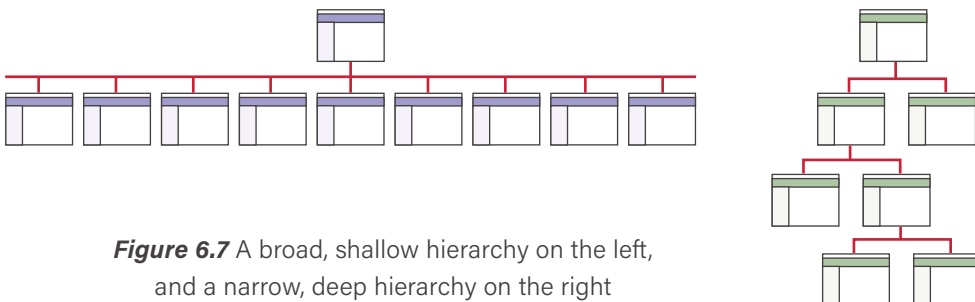
Figure 6.7 A broad, shallow hierarchy on the left, and a narrow, deep hierarchy on the right

6.5.3 Analyse content

If you're working on a website that already exists, it will be populated with a wide variety of content. In this case, you need to perform a content audit, which is an examination and evaluation of the existing material.

If the website is new, or if you plan to add new content to an existing website, you need to put together a content strategy. This is a plan that outlines what content is needed and when and how it will be created. There's no single template or model for this, so every content strategy will be unique.

The content strategy is largely the responsibility of the strategy, copy, and concept teams, but the UX practitioner needs to get involved in a few key roles. The points that UX needs to address are:

What the site should achieve: Naturally, the content should work towards achieving the objectives of both the site and the business.

What the user wants and needs: By conducting thorough user research you should be able to answer this question. Provide only content that will add real value to the user.

What makes the content unique, valuable, or different: Content needs to provide value to the user. A content strategy will help ensure content is updated regularly and will include up-to-date information.

The tone and language used: You need to consider the tone, whether it's fun, light, or serious, the register, whether it's formal or informal, and the style, you will use across your content. Make sure tone, style and register are consistent across text, images, videos, and other content types. Correct grammar and spelling are important considerations as they speak to the credibility of the site.

> **NOTE**
>
> Don't forget SEO! There are lots of ways that a website can be optimised during the UX planning process. Have a look at **Chapter 5: Search engine optimisation** for some guidelines on what to include.

6.5.4 Principles of creating content

There are three key points you should consider here:

1. Structure

Content needs to be written so that users can find the information they need as quickly as possible. **Chapter 10: Planning your content** will cover this in more detail. Copy can be made more easily readable by:

- Highlighting or bolding key phrases and words
- Using bulleted lists
- Using paragraphs to break up information
- Using descriptive and distinct headings.

2. Hierarchy

On the page, use an inverted pyramid style or F structure for your copy. The important information should be at the top of the page to make for easy visual scanning. The heading comes first and is the largest and boldest type on the page. The subheading or blurb follows this, and then the content is presented in a descending scale of importance. Sentences should be short, and important words should appear early in the sentence, especially in bullet points. Eye-tracking research has shown that the F structure is still the most user-friendly structure, as this is the natural flow of the eye (Hanes, 2016).
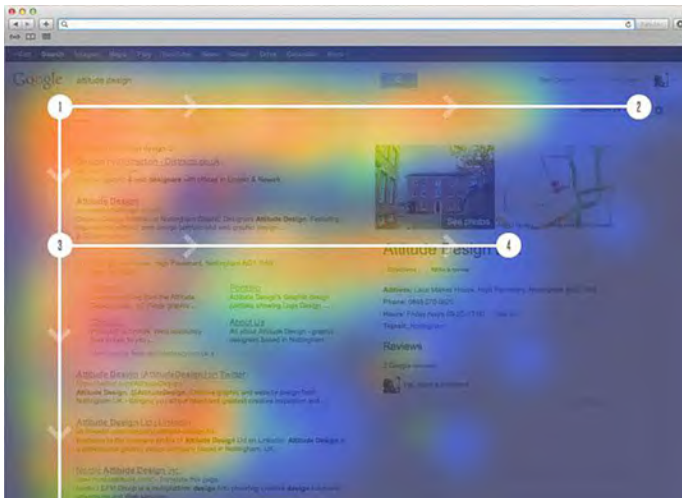
Figure 6.8 Users read websites in an F structure, and your site should enable this

3. Relevance

Above all, the content on the page must be relevant to the user and the purpose of the page itself. If a user clicks to read about a product but ends up on a page with content about the company, their experience is going to be tarnished.

6.5.5 Create a sitemap

In UX terminology, a sitemap is the visualised structural plan for how the website's pages will be laid out and organised. The sitemap provides a high-level view of the entire site, including how pages are linked, and the titles of each page. The sitemap allows the webmaster to determine whether any pages are missing or can be deleted, and how the site has come together.
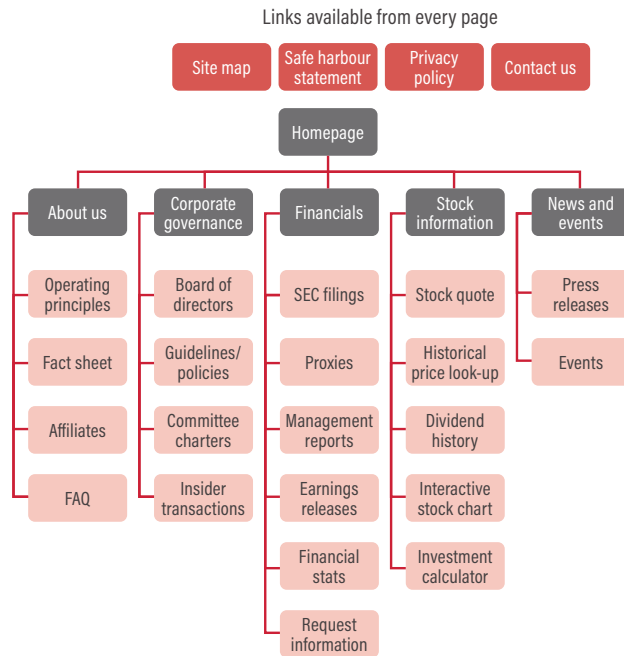
Figure 6.9 An example of a sitemap

To create the visuals for your sitemap, you can follow this process:

1. **Define your homepage**. This should be the top item in the hierarchy.
2. **Place the main navigation** items below the homepage.
3. **Arrange your pages of content** below the main navigational items, according to the results of your user testing and insight and your information architecture structure.
4. **Add pages below** this until you have placed all your content. Make sure that every page is accessible from at least one other page. It may seem obvious, but you'd be surprised how often this is overlooked!
5. **Define any other navigation elements** (i.e. the footer, sidebar, header navigation, and search tools). Place these in your diagram in a logical place, possibly branching off directly from the homepage, or as separate blocks.

Which sitemap is which?

The term 'sitemap' can have two meanings. One is the way it's defined above – the structural plan of the website. The other is a page on your website that lists all the pages available in a logical and accessible way. An example is the Apple website's sitemap: apple.com/sitemap. This sitemap should be available from every page. Dynamic sitemaps can be employed so that it is updated automatically as information is added to the website. Different sitemaps exist for different purposes, so investigate what your users would find most useful.

6.5.6 Build the navigation

The navigation should guide users easily through all the pages of a website; it is not just about menus. Successful navigation should help a user to answer four basic questions, such as where am I, how did I get here, where can I go next, and How do I get home?

1. Where am I?

Navigation should let the users know where they are in the site. Breadcrumb links, clear page titles, URLs, and menu changes all help to show the user where they are. The larger your site is and the more levels it has, the more important it becomes to give your users an indicator of where they are in relation to everything else on the site. This helps the users to understand the content of the page that they are on, and makes them feel more confident in navigating further through the site.
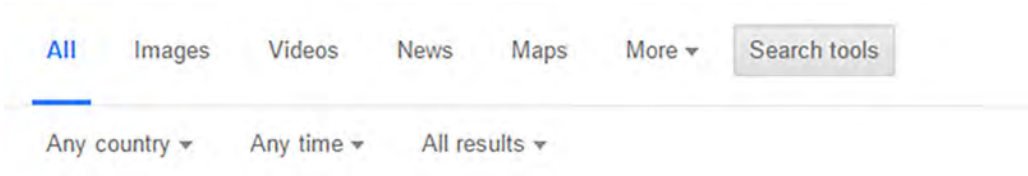
Figure 6.10 Google's search results have clear navigation options

2. How did I get here?

Breadcrumb navigation often indicates the general path a user may have taken. In the case of site search, the keyword used should be indicated on the results page.

3. Where can I go next?

Navigation clues let a user know where to go to next, such as 'Add to cart' on an ecommerce site or a contextual link that indicates 'Read more'. The key is making the options clear to the user.

4. How do I get home?

It has become convention that the logo of the website takes the user back to the homepage, but many users still look in the main menu for the word 'home'. Make sure that they can get back to the beginning quickly and easily.

6.5.7 Create the layout

A web page can be broken down roughly into four zones:

> **NOTE**
>
> There is a tendency, when thinking about navigation, to plan in only one direction, from the homepage down the chain of pages in the hierarchy. But very often, users arrive at the site from a link or search result that drops them deep in the website. This makes it equally important to look at reverse navigation, in other words, getting from the bottom level pages back to the top.

Figure 6.11 The four main zones of a website

Each of these typically contains certain types of elements and content, such as:

1. **The header (at the top of the page):** Used to identify the site and provide basic tools:
   • Logo or identifying mark (possibly including the brand's tagline)
   • Main navigation
   • Login feature
   • Search bar.

2. **The central content area:** Used to present the main content:
   • The actual content specific to the page, such as text, images, videos, and more (This can be broken into several columns.)
   • CTAs of various kinds, such as 'Sign up'; 'Get started'; 'Claim your free trial.'

> **NOTE**
> Users consider information in the sidebars to be less important, so don't put your key message there.

3. **The sidebar (either on the left or the right, or sometimes on both sides):** Used to present secondary content and tools:
   • Secondary navigation bar or other navigation features (i.e., blog article archive by date)
   • CTAs, including buttons and signup forms
   • Additional content, like links or snippets.

4. **The footer (at the bottom of the page):** Used for important but non prominent content and resources:
   • Legal information, privacy policy, and disclaimers
   • Additional navigation elements.

The most important consideration for any page layout is the content: what needs to be included, what is the most important action or piece of information, and how can this be structured to meet the user's needs? After all, web pages are created to support a user's journey. All pages on your site should not necessarily look identical.

Creating sketches, wireframes, and prototypes

Wireframes are the skeletal outlines of the layout of a web page. Their purpose is to map out the placement of various elements on the page as a guide for the designer to create the visual design and the web developer to create the code and interactivity required. Wireframes can be low fidelity (very rough and basic sketches, barely resembling the final output) or high fidelity (very detailed, complex layouts including creative elements). Any website project will have several wireframes, at least one for each template page. Capture your first ideas on paper; it's the fastest and best way to capture good ideas.
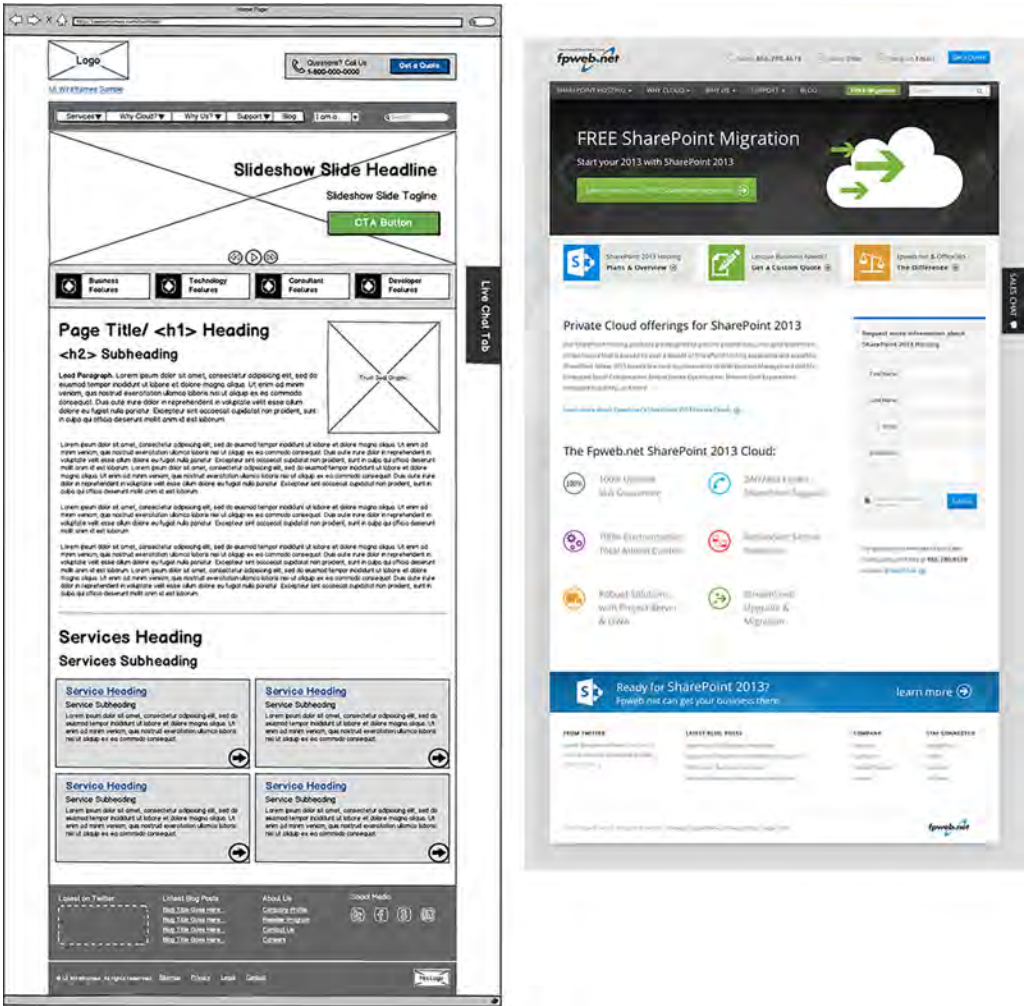
Figure 6.12 Low-fidelity and high-fidelity wireframes

Prototypes are a step up from wireframes, in that they are interactive. Prototypes are essentially sets of wireframes that have been linked together like a website, so that they can be navigated through by clicking and scrolling.

Prototypes are excellent tools for testing the flow and function of a proposed website before diving into the costly and lengthy design and development phases. They can save a lot of time, money, and effort by helping to identify problems and improvements upfront. Again, paper prototyping is the best method for fast, iterative UX design.

6.5.8 Assemble the other elements

Once you've defined your content and mapped out the basic layout of each page, you need to add all the extra elements that your website will need. Remember that the page should only ever contain the elements a user might need to support them in their task. These can include:

- **Calls to action:** CTAs can take a variety of shapes and forms, from in-text links to large buttons.
- **Forms:** These are interactive fields where users can enter their contact details or other information, for example, to sign up for a newsletter or enter a competition.
- **Search:** Many sites can benefit from having a search function, both to help users navigate and to make finding specific information easier.

> **NOTE**
>
> Paper prototypes make testing quick and easy. They're portable, easy to use, and don't require complex tools, internet connections, or user skills. Mobile apps like POP easily turn paper prototypes into clickable demos. See section **5.8: Tools of the trade** for more information on the POP app.

Calls to action

Successful CTAs are simple, quick, clear actions that don't require the user to make a commitment or to do anything they may feel unsure about. They should always do exactly what they state in order to instil confidence and clarity. It's all about managing user expectations: Do they actually go where they think they will? Do they perform the action that users expect?

Positioning

The primary CTA should usually appear above the fold to capture the attention focused here. Other CTAs can appear below the fold, and the main CTA can also be repeated lower down.

Prioritisation

A single web page can be built around one CTA or could incorporate a wide range of possible desirable actions. This all comes down to what the overall page and website seek to achieve, based on the business requirements.

When multiple CTAs are used, there should be one primary action that stands out strongly and the others should be more muted, playing a supporting role. CTAs can be differentiated through colour, shape, placement, and size; the fewer choices, the better.
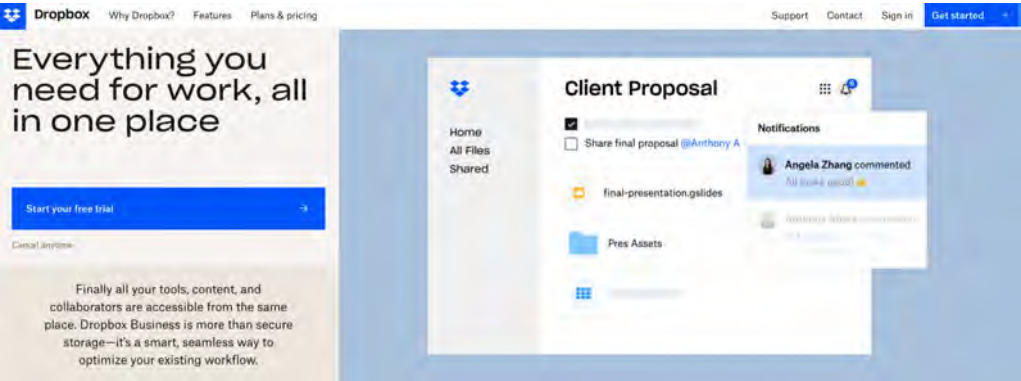
Figure 6.13 The Dropbox website has a clear primary CTA in blue for 'Start your free trial' and a secondary 'Get started' in the top right

Clickability

Any CTAs that can be clicked must look tactile or touchable. This means they must stand out somehow from the background and from static elements. One approach is to make the button look like a real button, standing out from its environment. Another train of thought advocates for the flat design approach as a more elegant and modern strategy.
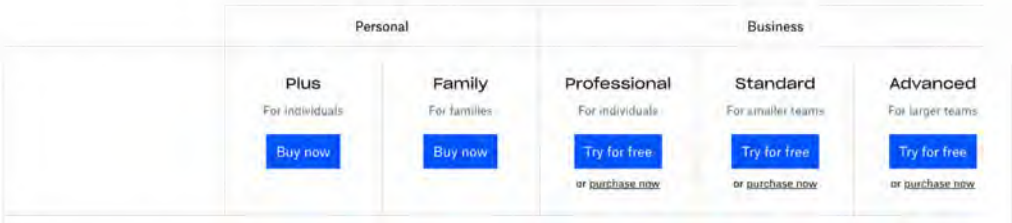
Figure 6.14 Clickable CTA buttons

Quantity

Finally, be sure not to overwhelm users with too many choices. Stick to one central CTA per page, making it obvious to users what the main goal, action, or outcome of the page is.

Forms

Forms are extremely useful tools for gathering user information and encouraging interaction on the site. Users are generally familiar with them and have some experience filling them out, and there are lots of web conventions that govern how these should be set up. As a general rule, the shorter you make your form, the better. The fewer fields users have to fill out, the more likely they are to complete the process.

Steps and sections

Simple forms with only a few fields can be assembled as a series of boxes. For forms that are longer, for example, those in ecommerce checkouts or complex registration processes, it makes sense to split them up into manageable portions. Manage users' expectations by clearly indicating what the next step is.

Relevance

Simplicity is a key consideration, forms should be as short and clear as possible. The effort must be equal to the reward gained. All of the fields included must be clearly relevant to the purpose of the form, otherwise users may get confused or suspect that you are harvesting their information.

It is important that users are notified about which fields are required and which are optional. If all the fields are required, then the form should indicate this clearly.
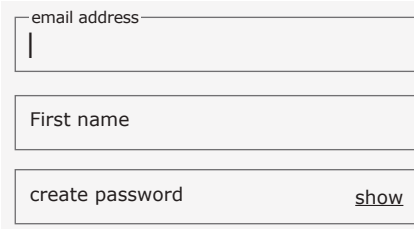
> **NOTE**
> Be aware of local laws that define what information you're allowed to collect and how you can use it.

Assistance

It is a good idea to include help for users filling out forms. This is especially the case where a specific field requires inputs to be entered in a certain way and doubly so for password fields with special rules. Users will not instinctively know the rules associated with specific fields, so you must provide plenty of guidance along the way.

A form should be well designed and intuitive rather than provide tips and text to users on how to complete it. Ideally, users shouldn't need any help at all.

email address

First name

create password   show

Figure 6.15 A newer interactive form that provides assistance to users by moving the label text from being a placeholder to hovering above the field

Validation

Validation means giving the user feedback on the inputs they have submitted, whether correct or incorrect. Validation can happen at two points, after the user has submitted the form, which is submission validation, or during the process of filling out the form, which is live inline validation. Submission validation is essential for protecting the database, but will also assist in catching

user errors. Live inline validation usually results in much better user experiences as the users then know that their information is correct before submitting the form.

Figure 6.16 A simple, intuitive sign-up form that provides clear guidance

Error messages are an important part of validation that is shown to users. Error messages are often ignored in UX development and are a huge source of frustration for users.

Some best practices to consider:

- These messages should be easy to understand, meaning the user should not struggle to understand the error or how to fix it.
- The error message should stay visible until the error has been corrected.
- The tone of the message should match the rest of the site.
- It is important to remember that a form is a conversation with users. It's an interactive dialogue even though you are not present.

reCAPTCHA

reCAPTCHA is a free service offered by Google that requires users to answer questions to prove they are not bots. It helps to protect websites from spam and abuse but does reduce conversions, and in certain instances, can render the site unusable for users. Despite these accessibility issues, reCAPTCHA is still an important factor when developing forms in order to protect your website.

Figure 6.17 An example of reCAPTCHA included in a form

Search

Search has three useful functions on a website. Not only does it help users to find specific things, it also serves as an essential navigation aid for larger sites and collects valuable data from keyword research about what the user is looking for. From the UX practitioner's perspective, there are some important non-technical principles to bear in mind.

For large sites, it can be useful to allow users to search within categories. On Amazon, for example, you can search just within the category 'books'.

Figure 6.18 The advanced search within 'Books' on Amazon.com

Positioning

Search will either be the primary starting point for your site, or it will be a useful additional tool. In the former case, for example, on a large eCommerce site such as Amazon, the search tool should be positioned centrally and visibly to encourage the user to use this as the main navigational tool. In the latter case, best practice dictates that it should be in the top-right corner or easily accessible in the sidebar.

Accuracy

The better you can interpret what your user is searching for, the more relevant and accurate the search results can be. Google works very hard to fine-tune its search algorithm to ensure that users don't just get what they searched for, but what they actually wanted in the first place.

User research can suggest why they would search your site, and what they would typically be looking for. Popularity and recentness of content are other key considerations.

Results

When it comes to displaying search results, there are a few key questions to ask:

Questions	Answers
How many results should be displayed per page?	Ten to 20 results per page is generally a good benchmark.
What order should results be in? Most popular first? Cheapest? Newest? Closest match?	This will depend on the nature of the site.
Can results be filtered?	Some websites allow users to do a second search constrained to the results of the first one.
What happens if there are no results?	If no search results are found, the search function should provide hints and tips to the user on how to navigate better on the site. The fact that there are no results should be stated clearly, followed by a list of the closest match of content to the search query. It's quite possible the user didn't know the exact term for what they were looking for or made a typo, though the site should be forgiving of these. Hints could include wildcards or breaking up the terms into smaller pieces. The message shown to users should be helpful and relevant, and not simply copied from Google's advice.

6.5.9 Define the visual design

Before users interact with your carefully considered content, your excellent navigation structure and slick search bar, their first impression comes from the look of the website,

such as the colours, graphics, and overall design elements. As people are spending more and more time on the web, they are less tolerant of websites that don't look good or credible. While a website is not an art installation, it is a design project, and the fundamentals of good design apply.

While much of the visual design expertise will come from the graphic designer, it's valuable for the UX practitioner to know the following principles of visual design:

Colour

Colour has an incredible psychological effect on people. Based on our culture, preferences, and learned cues, people interpret colours in very specific ways. This can be used to inform and steer user experience.

When choosing the colour palette for your website, be aware of legibility and accessibility concerns. Using a lot of open or white space often makes sites appear simple and easy to read.
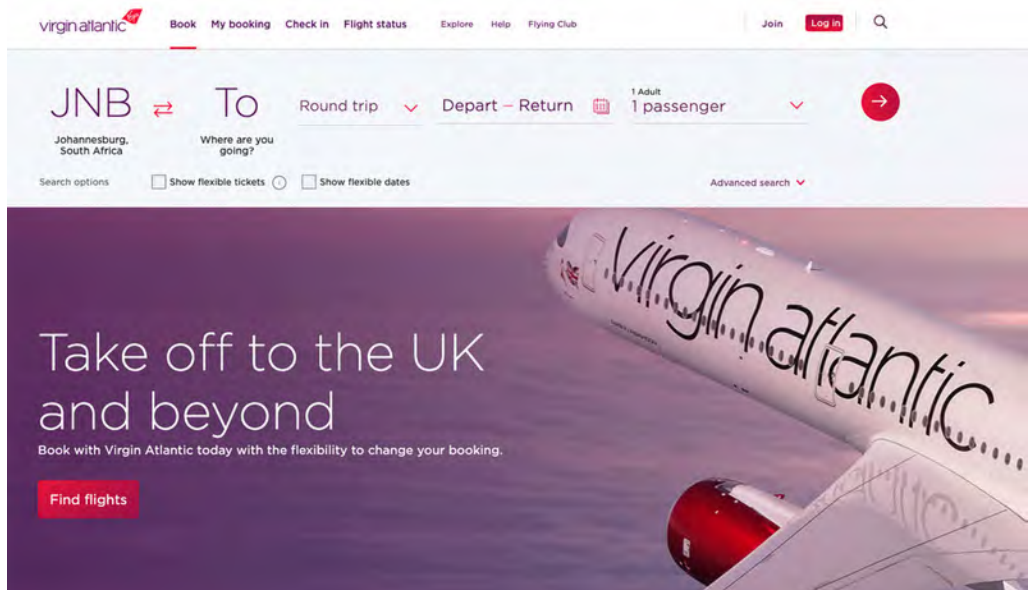
Figure 6.19 The Virgin Atlantic website places the most important information upfront and uses colour to draw the eye to the important buttons/forms

Imagery

The choice of images used on the website can have a massive effect on how users behave and interact on the page. You can never be quite certain which images will have the best results, so this is one area where you will need to do a lot of testing (See **6.7 Conduct testing** below).

Humans tend to gravitate towards and identify with pictures of other humans. Content strategy should include an image strategy, especially if the site is rich in images. Camera angles, content, brand strategy, and the tone of the visuals all need to be considered. Images must always be relevant and not used as fillers or pure decoration.

6.6 ADVANTAGES AND DISADVANTAGES OF UX DESIGN

Ensuring you adhere to all the principles of UX design can be costly and time consuming. Testing each development or aspect of the site can be very drawn out. However, the advantages that UX provides far outweigh the costs.

Good UX means users will have a pleasurable experience on your site. In turn they are more likely to return and recommend your site, ultimately leading to sales that help meet your business objectives. Poor UX means users have negative and disappointing experiences; they may not return and may relate their negative feedback to others, which in turn can result in the loss of potential sales.

Including UX from the beginning helps to keep costs low and on budget. It is estimated that for every US $1 spent in the initial phases to improve UX, it costs US $10 to fix during development and upwards of US $100 to fix after the product is released (Gray, 2016).

6.7 CONDUCT TESTING

Measuring how successful your UX has been cannot be left until the final website is complete and ready for launch. The key to an effective user-friendly site is testing each step of the way during the design, development, and implementation process. User testing is crucial to UX.

User testing means giving one or more users access to a website or prototype and observing how they behave when using it. The purpose of this is to discover problems and gain insights that can be used to improve the final product.

The goal of user testing is not to eliminate every potential problem on a website; that's simply not possible, especially if you consider how subjective this can be. The goal is to work towards creating the best possible experience for users by constantly improving and optimising.

NOTE

In the real world, time and budget limitations will certainly have an impact on how much you can test, but the goal should always be to maximise testing, in whichever way you can. Learn more in **Chapter 21: Conversion optimisation.**

The two biggest questions around testing tend to be "What do I test?" and "When do I test it?" The answers are simple: Test as much as possible, as often as possible, and as early as possible.
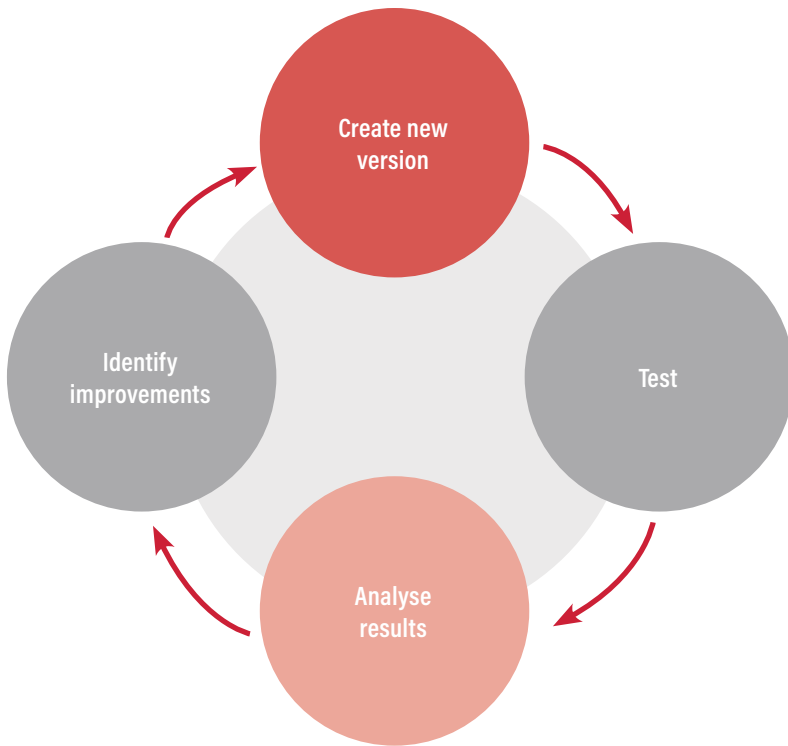
Figure 6.20 Iterative UX testing process

User testing follows a set process:

1. Formulate a question to test
2. Choose a test and prepare
3. Find subjects
4. Test
5. Analyse
6. Report
7. Implement
8. Start again.

6.8 TOOLS OF THE TRADE

UX tools range from rudimentary (pen and paper) to highly sophisticated (web applications and tech tools). Here is a brief roundup of popular options:

Balsamiq (balsamiq.com) bills itself as a 'rapid wireframing tool' and is great for creating fun, low-fidelity wireframes and simple prototypes.

Axure (axure.com) is an all-purpose prototyping tool that allows you to create fully interactive wireframed websites without needing to code anything. A useful feature is that it also generates technical specifications for developers to work from, based on the interactions and links created in the prototyping process.

Gliffy (gliffy.com) is a web-based tool that allows you to create a wide range of diagrams, everything from wireframes to sitemaps to charts.

InVision (invisionapp.com) is a web-based tool that allows you design prototypes across web and mobile.

POP (marvelapp.com/pop) or Prototyping on Paper, is a free app for prototyping apps on mobile.

Canva (canva.com) is useful for creating simple website wireframes for web, tablet, and mobile. You can also use it to create sitemaps and flow diagrams that describe the user's journey through a site or app.

6.9 CASE STUDY: TINDER

Tinder is arguably the most popular dating app in the world, with 75 million monthly active users in 2020 (Iqbal, 2022).

One-line summary

In order to make using the app effortless and fun, the developers of Tinder focused on the user experience as much as the outcome, resulting in the 'swipe right' action that has become synonymous with Tinder.

The problem

Generally speaking, dating websites were tedious for users, who had to spend a lot of time creating long profiles. These dating sites were also complicated and stigmatised. The developers were interested in creating a simple app design that was 'sticky', engaging, intuitive, and fun but also simple to use with a quick onboarding process.

The solution

Tinder is famous for the 'Swipe Right'® concept. If a user likes what they see, they swipe right. If the person they have swiped right on has also swiped right, there is a 'match' and the users are given the option to message one another (in-app messaging).

This simple user experience has resulted in high levels of engagement for the app.

This was not the only UX design decision made by the team. Further UX successes include the following:

- A simple registration process
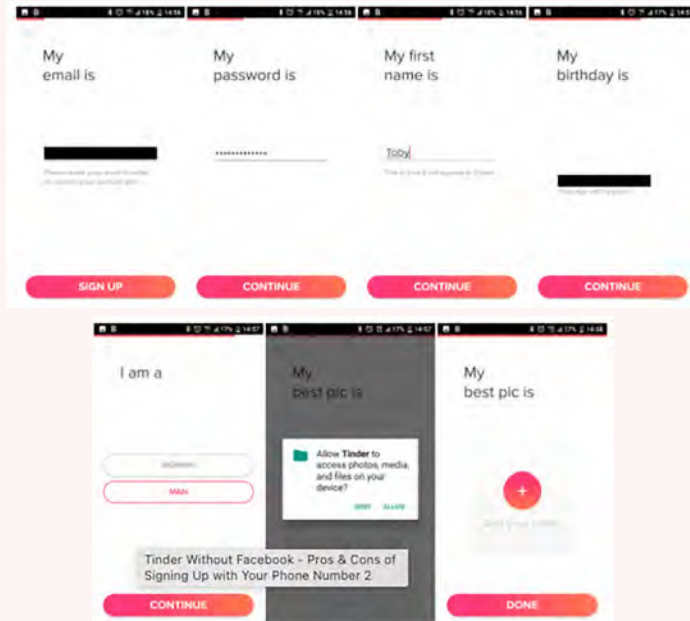
Figure 6.21 The registration process on Tinder is simple and quick

- Card stack/panel design, which is employed for many of the actions on the app (including the registration process shown above). This means that users are focused on one action at a time, rather than having multiple actions or decisions to make at once (the way they might when using a dating website).
- In-app gestures that are simple and intuitive.

The results

Jonathan Badeen, co-founder of Tinder, had the following to say about their motivation to create Tinder:

After school ends, your non-digital social network begins to shrink and it becomes really hard to meet new people – especially outside of a work environment. I think this was really one of the largest motivators for us. Helping people meet was our priority. Many of the choices we made were driven by the need to make that experience easy and enjoyable instead of frightening.

The mark of a dating app's success is two-fold: engagement and results. According to Tinder, their average active users log in four times a day. They also say that 1.5 million Tinder users go on dates every week.

Figure 6.22 shows market share for the largest dating apps, with Tinder the clear market leader.
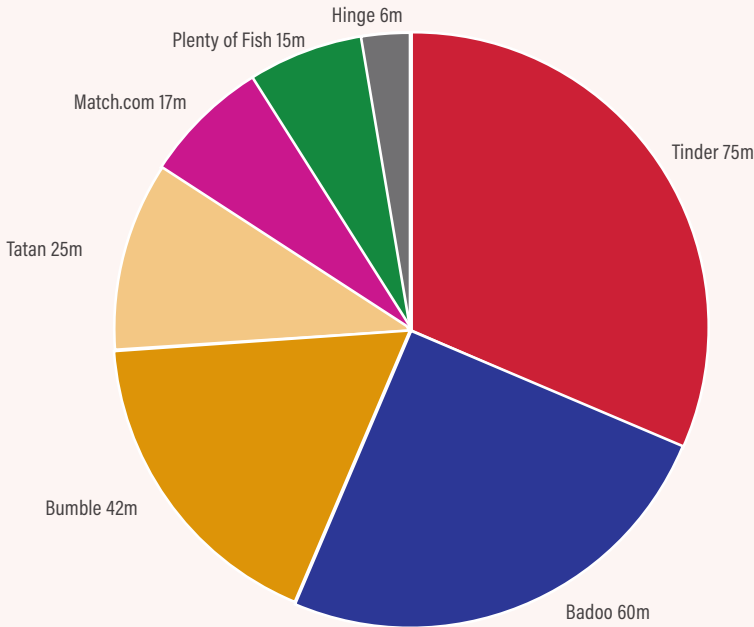
Figure 6.22 Market segmentation of dating apps

6.10 CASE STUDY QUESTIONS

1. To what extent do you think the UX design has contributed to Tinder's success in the dating app space?
2. What elements would you have included in Tinder's UX design?
3. A criticism of Tinder is that the motivations of app users are not always aligned. How could you use UX design to improve this?

6.11 THE BIGGER PICTURE

UX touches on so many aspects of digital marketing that it's hard to list them all. It's involved right up front at the strategy and research phase and then touches on all the create disciplines, such as web development, design, copywriting, and SEO. For example, when it comes to SEO, Google's algorithm assesses the UX design on a website as part of the overall decision on where to rank it.

Social media, email marketing, display advertising, video marketing, and other fields can also benefit from solid UX thinking, such as "What do users want, need and expect from you on these channels?" Finally, UX goes hand in hand with web analytics data as both disciplines aim to understand users and create real, actionable insights from the data gathered about them.

6.12 SUMMARY

Users come first when creating any web-based marketing channels. Core UX principles, such as user-centric design, web conventions, simplicity, and credibility, are essential for creating web experiences that are seamless, memorable, and valuable to users.

Mobile UX is a special subset of the discipline that takes the unique context and characteristics of mobile users into account, whether for designing a mobi site, an app, or a responsive website. When it comes to implementing a UX process, the following steps should be followed:

1. **Identify business requirements:** What does the business need to get out of the site?
2. **Conduct user research:** Who are you building the site for, and why? What information do they need? How will they move through the site? Does the user need this?
3. **Create the basic structure:** What goes into solid information architecture?
4. **Analyse and plan content:** How should content be put together here?
5. **Design the sitemap:** How will the overall website be structured?
6. **Build and develop the navigation:** How will users get to where they need to go?
7. **Create the layout:** What will each page look like, from top to bottom? Does the layout support the functional purpose of the website? What content is needed for this page to achieve its business goals?
8. **Add other useful elements:** How will CTAs, search tools, and forms behave? Where will they be best placed to achieve the business goals?
9. **Conceptualise the visual design:** How will the visual layer add to the overall UX impact?
10. **Conduct user testing:** Are there any errors on the site, and is it easy to use? Testing should be done at each step in the UX process. The earlier errors or difficulties in the UX are picked up, the more cost effective it is to correct and change.

6.13 CHAPTER QUESTIONS

1. Provide a succinct explanation of UX and its purpose.
2. What are the six qualities that make up a good user experience?
3. Are there any mobile-specific issues that UX designers should keep in mind? What growing trend should UX designers keep in mind when designing any user experience?
4. Explain why testing is so important with UX.
5. List at least three things that can ruin a website's UX experience.

6.14 FURTHER READING

lukew.com – The blog of Luke Wroblewski, one of the world's foremost UX experts. It's filled with research and practical advice for working UX practitioners.

sitepoint.com/11-free-ux-e-books-worth-reading-2016 – A list of books on UX that are free and well worth reading.

smashingmagazine.com – Smashing Magazine posts regular, in-depth articles and research focused on UX, technology and web design.

teamsuccess.io/UX – A brilliant checklist for UX designers.

uxdesign.cc/breaking-down-the-brilliant-and-simple-design-of-tinder-cc4e07859c5e – Read more about Tinder's UX journey. This website is also a good resource for UX design articles.

6.15 REFERENCES

Adaptive Path, n.d. Rail Europe. [Online image]
    Available at: www.uxforthemasses.com/wp-content/uploads/2017/01/RailEurope_AdaptivePath_
    CXMap_FINAL.pdf
    [Accessed 11 May 2022]

Breeze, J., 2009. You Look Where They Look! [Online]
    Available at: www.objectiveexperience.com/eye-tracking-ux-research
    [Accessed 11 May 2022]

Charlton, G., 2014. 21 First class examples of effective web form design. [Online]
    Available at: econsultancy.com/blog/64669-21-first-class-examples-of-effective-web-form-design
    [Accessed 11 May 2022]

Fang, R., 2021. Breaking down the brilliant and simple design of Tinder. [Online]
    Available at: uxdesign.cc/breaking-down-the-brilliant-and-simple-design-of-tinder-cc4e07859c5e

freshbooks.com/ [Online]
    [Accessed on 14 February 2022]

Gray, C., 2016. 6 Benefits of UX Design. [Online]
    Available at: www.nomat.com.au/6-benefits-ux-design/
    [Accessed on 11 May 2022]

Hanes, L., 2016. Does the F-shaped pattern for reading web content still apply? [Online]
    Available at: write.co.nz/does-the-f-shaped-pattern-for-reading-web-content-still-apply/
    [Accessed 16 February 2022]

Hinderer, D. and Nielsen, J., 2003. 234 Tips and Tricks for Recruiting Users as Participants in Usability Studies.
    [Online]
    Available at: media.nngroup.com/media/reports/free/How_To_Recruit_Participants_for_Usability_
    Studies.pdf
    [Accessed 11 May 2022]

Idler, S., 2013. The Effect of Human Faces in Web Design.
    Available at: blog.usabilla.com/effect-human-faces-web-design/
    [Accessed on 11 May 2022]

Iqbal, M., 2022. Tinder Revenue and Usage Statistics (2022). [Online]
    Available at: www.businessofapps.com/data/tinder-statistics/
    [Accessed 11 May 2022]

Kolowich, L., 2016 16 of the Best Website Homepage Design Examples [Online]
    Available at: tuitmarketing.com/16-of-the-best-website-homepage-design-examples/
    [Accessed 11 May 2022]

Kolowich, L., 2016. 15 Testimonial Page Examples You'll Want to Copy. [Online]
    Available at: blog.hubspot.com/service/testimonial-page-examples#sm.0010tgydx19ivep1tlq2gi1yw97c4
    [Accessed 11 May 2022]

Krug, S., 1997–2013. Advanced common sense. [Online]
    Available at: www.sensible.com/
    [Accessed 11 May 2022]

Lewes, J., 2015. How to incentivise participants to get the most from your user testing or research. [Online]
    Available at: www.peopleforresearch.co.uk/blog/2015/06/how-to-appropriately-incentivise-participants-to-get-the-most-from-your-user-testing-or-research/
    [Accessed 11 May 2022]

Lynch, P., and Horton, S., 2011. Site Structure. [Online image]
    Available at: webstyleguide.com/wsg3/3-information-architecture/3-site-structure.html
    [Accessed 11 May 2022]

Madaio, M., 2016. The new rules of form design. [Online]
    Available at: www.uxbooth.com/articles/the-new-rules-of-form-design
    [Accessed 11 May 2022]

NorthernUX., 2011. Rapid Prototyping with Axure RP Part 3 – Using Axure for Usability Testing.
    Available at: www.slideshare.net/NorthernUX/rapid-prototyping-with-axure-rp-part-3-using-axure-for-usability-testing
    [Accessed 11 May 2022]

Roller, C., 2010. Abundance of Choice and Its Effect on Decision Making. [Online]
    Available at: www.uxmatters.com/mt/archives/2010/12/abundance-of-choice-and-its-effect-on-decision-making.php
    [Accessed 1 June 2022]

Spool, J., 2009. The $300 Million Button. [Online]
    Available at: articles.uie.com/three_hund_million_button/
    [Accessed 11 May 2022]

Sterling, G., 2012. Screenshot 2012-02-29 at 2.00.48 AM. [Online image]
    Available at: www.screenwerk.com/media/Screen-shot-2012-02-29-at-2.00.48-AM.png
    [Accessed 24 January 2017]

The next web, 2014. There are 18 796 distinct Android devices, according to OpenSignal's latest fragmentation report. [Online]
    Available at: thenextweb.com/news/18796-different-android-devices-according-opensignals-latest-fragmentation-report
    [Accessed 11 May 2022]

thinkwithgoogle.com, 2016. How Mobile Search Connects Consumers to Stores [Online]
    Available at: www.thinkwithgoogle.com/marketing-strategies/app-and-mobile/mobile-search-trends-consumers-to-stores
    [Accessed 11 May 2022]

www.usabilityfirst.com/glossary

XKCD, 2011. University Website. [Online image]
    Available at: xkcd.com/773/
    [Accessed 11 May 2022]

6.16 FIGURE ACKNOWLEDGEMENTS

Figure 6.2: XKCD.com

Figure 6.3: Red & Yellow blog, 2021

Figure 6.4: Download Button, by Junes. Dribble, 2013

Figure 6.5: Screenshot, Freshbooks www.freshbooks.com

Figure 6.6: Xero.com

Figure 6.7: Site structure, Lynch, P. and Horton, S. Web style guide, 2013

Figure 6.8: Towermarketing, 2016

Figure 6.9: Stokes, 2013

Figure 6.10: Screenshot, Google search bar navigation, 2017

Figure 6.11: Simple page regions. Lynch, P. and Horton, S. Web Style Guide, 2017

Figure 6.12: UI Wireframes uiwireframes.com/portfolio/wireframe-example-2, 2022

Figure 6.13: Dropbox.com

Figure 6.14: Dropbox.com

Figure 6.15: UX Booth uiwireframes.com/portfolio/wireframe-example-2, 2022

Figure 6.16: Econsultancy, 2014

Figure 6.17: reCAPTCHA

Figure 6.18: Screenshot, Amazon, 31 January 2018

Figure 6.19: Screenshot, Virgin Atlantic, 2022

Figure 6.20: Stokes, 2013

Figure 6.21: onlineforlove.com/tinder-without-facebook-account-pros-cons-sign-up-phone-number, 2022

Figure 6.22: www.businessofapps.com/data/tinder-statistics/

Tinder logo: tinder.com

07

WEB DEVELOPMENT AND DESIGN

In this chapter, you will learn:

- How the web development process works, from planning through to design and launch
- About development and design best practices and the principles of designing for persuasion
- How to assess the quality and effectiveness of web development and design implemented by suppliers or agencies
- How to evaluate the need for either a static or CMS website.

7.1 INTRODUCTION

Websites are, in many ways, at the heart of successful digital marketing. They are your home on the web, a shop window over which you have full control, and often the first place people go to find out more about you.

Web development and design applies to more than just websites. The principles can be used for any digital assets you create, from mobile platforms to social media profiles.

Creating online assets involves three key processes: planning and design, which create the appearance, layout, and style that users see, and development, which brings this imagery to life as a functioning web tool.

> **NOTE**
> Unlike social media properties, your website is not subject to changes in policy, and content remains easily accessible regardless of its age.

The fundamental principle of good development and design is to understand your users, since they are the people who will actually be accessing and interacting with your website. What are they looking for? What are their objectives? Your offering must have user experience central to the process.

7.2 KEY TERMS AND CONCEPTS

Table 7.1

Term	Description
Accessibility	The degree to which a website is available to users with disabilities, such as the visually or hearing impaired, and those technically disadvantaged by not having the necessary device, software or browser.
Adaptive web design	Websites that respond to a user's screen size by loading predefined layouts.
Alt text	Alt text means alternative text. The 'alt' attribute is used in HTML to attribute a text field to an image on a web page. It normally has a descriptive function, telling a search engine or user what an image is about and displaying the text in instances where the image is unable to load. It is also called Alt tag.
Anchor text	A text link, or backlink, that refers visitors to your site from another with SEO benefits, passing relevance and authority from the referring site.
Bounce	When users leave a site before navigating from their landing page to another.
Branding (or visual identity or corporate identity)	Terms that refer to the look and feel of your business. In this context, used when discussing how your logo, colours, and styling elements are translated from traditional print-based assets to digital.

Breadcrumbs	Links, usually on the top of each page, indicating where a page is in the hierarchy of the website. Breadcrumbs can be used to help users navigate through the website, as well as act as a page index for search engines.
Cache	Files stored locally on a user's browser to limit the amount of data called from the server on a return visit.
Call to action (CTA)	A phrase written to motivate the reader to take action (sign up for our newsletter, book car hire today, etc.). Calls to action are usually styled differently from other copy on a page so that they stand out and draw attention.
Content management system (CMS)	A software system that allows an administrator to update the content of a website, so that a developer is not required.
Common page elements	Items that appear on every page of a website.
Cascading style sheets (CSS)	A programming language that defines the styles, such as fonts and colours, used to display text and content. Web pages are one of the places that this language is used.
Client-side	Scripts that run in a user's browser, rather than on a web server.
dpi	Dots per inch (in an image). On the web, the screen resolution is 72dpi.
Graceful degradation	The use of both modern and antiquated web techniques and code to provide a safety net, or fallback, for users with older browsers and technologies.
HTML5	The most current iteration of the HTML (HyperText Markup Language) standard. It is a broad range of technologies that allow for rich media content and interaction on websites that do not require additional third-party plugins. It allows rich multimedia content to be displayed and easily viewed by users, computers and devices.
Information architecture	The way in which data and content are organised, structured and labelled to support usability.
JavaScript	A high-level, dynamic programming language commonly used to create interactive effects within web browsers. JavaScript is predominately a client-side language, only node.js is server-side.
Landing page	The website page that a user is sent to after clicking on any link or CTA, for example, in an email or affiliated site, in a display ad, or a paid or organic search engine listing. The landing pages that have the most success are those that match up as closely as possible with the user's search query or intention.

Metadata	Information about a web page and the elements on it that can be entered to provide context and relevant information to search engines.
Native mobile application	A mobile application designed to run as a program on a specific device or mobile operating system.
Navigation	How a web user moves through a website, and the elements that assist the user in doing so.
Open source	Software that makes the source code available so that other developers can improve on or build applications for the software.
Plug-in	Often referred to as a module or extension, a piece of third-party code that extends the functionality of a website.
Progressive enhancement	The development of web technologies in a layered fashion, prioritising basic content and functionality for all web browsers, while allowing users with higher bandwidth or browsers access to an enhanced version of the page.
Proprietary software	Any software that one or more intellectual property holders own and licence to others in exchange for compensation, subject to certain restrictions. Licensees may not be able to change, share, sell, or reverse-engineer the software.
Responsive web design	Responsiveness uses CSS media queries to change styles based on the target device, such as display type, width, height, etc. Only one of these is necessary for the site to adapt to different screens.
Search engine results page (SERP)	The actual results returned to the user based on their search query.
Server-side	Scripts that run on a server, as opposed to a user's browser.
Sitemap	On a website, a page that links to every other page in the website and displays these links organised according to the information hierarchy. While this is often physically available on a website (HTML sitemap), it should also be created as an XML file and included within the Robots.txt.
Universal resource locator (URL)	A web address that is unique to every page on the internet.
Usability	A measure of how easy a system is to use. Sites with excellent usability fare far better than those that are difficult to use.
Web application framework	Software used to help create dynamic web properties more quickly. This is done through access to libraries of code for specific language/s and other automated or simplified processes that don't need to be coded from scratch.

W3C standards	A common approach to development that focuses on accessibility and standardisation, overseen by the World Wide Web Consortium (W3C).
Web server	A computer or program that delivers web content to be viewed on the internet.

7.3 WEB DESIGN

Web design is the process of creating all the visual aspects of the interface. This covers the layout, colour scheme, images, logos, type, design elements (such as buttons and links), and anything else that you can see.

The web is a visual medium, so design is an important part of creating assets that are both engaging and effective. Designers need to keep in mind the technical aspects of design while prioritising the human factor. Digital properties shouldn't only look beautiful. They need to create a good experience for the visitor and meet business objectives, such as increasing sales, creating brand ambassadors, and encouraging sign-ups, and encouraging sign-ups that ultimately result in conversions.

7.3.1 Visual identity and designing for persuasion

The visual interface, or the design of a website, is what users see and interact with. It's the visual representation of all the hard work that goes into developing a website. It's what the site will be judged by first, and is the initial step in creating a delightful user experience. The interface matters. A lot.

There is a close relationship between UX and UI. Ideally the UI designer will use the documents created by the UX designer and add the visual skin, but often the designer has to manage both UX design and visual design.

Design is not just about aesthetics, although looks are very important. Design is about the visual clues we give users so that they know what to do next. It assures web visitors of our credibility and turns them into customers.

The visual designer plays a key role in defining good interface design, which involves many things closely linked to UX. Here are a few basic considerations:

- **Navigation:** The signage of the site, indicating to users where they are and where they can go.
- **Layout:** How content is structured and displayed.
- **Headers:** The element with a fixed position at the top of every page; this usually includes all primary navigation items that need to be presented on every page, such as main menu, login and search.
- **Footers:** The usually consistent bottom part of the page.
- **Credibility:** The professionalism implied by a well-designed site that tells users that you are who you say you are.

Visual identity

The visual identity answers the question, "How do users know it's us?" Certain design elements should be carried through on all web assets created for a brand, as well as print and traditional communication media. Often, the visual identity guidelines for the web are codified into a digital style guide document to ensure consistency across different agencies, designers, and teams. This document can include guidelines for creating all manner of web assets, including banners, social media content, and website design elements.

The logo is the most prominent way to reinforce your brand identity on the website. The logo is part of a brand's corporate identity (CI).

The primary font is typically used for prominent headings on the site, while body copy is often set in a standard web font that closely matches the primary font.

Menu and button style, as well as icons, are also part of a site's visual identity. Even when a user is viewing a small part of a site or page, it should look as if it belongs to the site as whole.
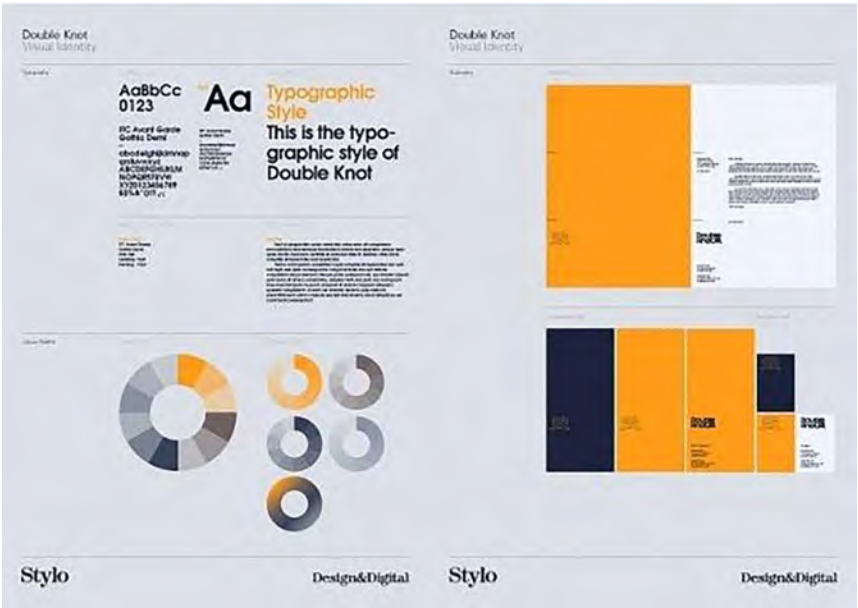
Figure 7.1 An example of a brand's visual identity

7.3.2 Design theory

Design can be a pretty precise science and there is a lot of research on what makes for effective design. A lot is also common sense and practice based on accepted web standards.

> **NOTE**
> Design theory is discussed in **Chapter 6: User experience design.**

7.3.3 Collecting and collating design assets

Elements, such as your logo and brand colours, represent your brand and form part of your brand expression. The latest versions of these brand assets need to be available to the designer or marketing agency designing your website.

Getting the right brand assets to designers in a good quality format that they can easily access will save time and avoid expensive mistakes.

Here is a list of brand assets that a designer requires to start working on a site. The quality, format (or file type), and file size are all important considerations:

- **Brand guidelines or style guide:** These are presented in Adobe Reader (PDF) format.
- **Logo and other key brand elements:** These are generated in Illustrator format (ai) or Photoshop format (psd). Best practice

> **NOTE**
> The brand guidelines or style guide would be created in Illustrator, PS, or Sketch, but saved for the client as a PDF.

  is to have your logo designed using vector graphics. If your logo or other brand assets are created in this format, they can be enlarged without losing quality. If you do not have a vector version of your logo available, then you should make sure that your image is at least 1 000 pixels wide.
- **Image libraries:** Photographs and images can be hosted online, where the designer can access them with a login. They can also be sent via Cloud file sharing services. Make sure the images are of sufficient quality. It is best practice to provide images that are 300dpi. Although all images on the web are displayed at 72dpi, a higher quality image will give your designer room to optimise and resize and crop or cut images where needed. It may be necessary to consider different images for mobile vs. desktop, because the viewpoint on mobile is so much smaller. You may need to consider using much fewer images for mobile or even none at all.

If you don't own the image and its copyright, it is illegal to use the image on your site without permission from the owner. If you require these images, they can be purchased from stock libraries online, such as iStock or Shutterstock. Avoid using images from Google Image Search on your pages.

- **Fonts folder:** You will need to provide both Apple Mac and PC versions of the fonts that are listed in your Style Guide. Many designers work on Macs, which use different font versions from those read by PCs.
- **Brand colours:** They need to be given to digital designers in RGB format. RGB stands for red, green, and blue and is the standard for colours online.
- Any **existing creative assets** that have been created for your brand over time, such as:
  - Print designs
  - TV ads.

- **Website copy:** This should be made available before the final design is required. This prevents delays caused by designers waiting for material. This applies to any additional assets your designer may need that can be downloaded or sent, such as your price guides or product descriptions.

Fonts

Copy conveys your brand message to your client or customer and should be easy to read and search-engine friendly. The CI is expressed through fonts, also known as typefaces.

Typographic layout can draw attention to the content users should see first. Indicate which pieces of information take precedence. Importance can be signified by text size, colour, weight, capitalisation, and italics. Placement also contributes to how important text appears.

Some fonts are common to all computer users. These fonts are known as web safe fonts. Anyone accessing websites that use these fonts will be able to view them as the designer intended, and search engines will be able to search these websites easily.

> **NOTE**
> Some web safe fonts are: Times New Roman, Arial, Helvetica, Courier New, and Lucida Console. See the full list here: www.w3schools.com/cssref/css_websafe_fonts.asp.

Arial   Comic Sans   Courier New

Georgia   **Impact**   Times New Roman

Trebuchet   Verdana

Figure 7.2 Examples of web safe fonts

To drive impact, designers typically prefer not to be limited to using only web safe fonts, and brand guidelines in most instances don't take web safe fonts into account. This means that fonts must be embedded by a developer using tools, such as Typekit, or loaded dynamically from tools, such as Google Fonts.

> **NOTE**
> You can also use Google Fonts as an alternative, which are more stylish than standard fonts and still viewable by most people. The developer will need to implement these. See www.google.com/fonts.

Grumpy wizards make toxic brew for the evil Queen and Jack.

Open Sans, 10 Styles by Steve Matteson

Grumpy wizards make toxic brew for the evil Queen and Jack.

Roboto, 12 Styles by Christian Robertson

Grumpy wizards make toxic brew for the evil Queen and Jack.

Slabo 27px, 1 Style by John Hudson
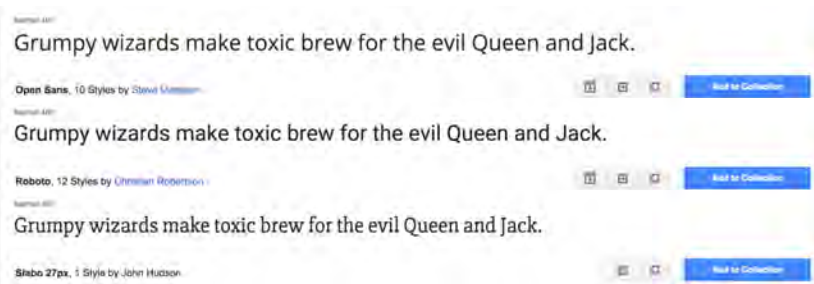
Figure 7.3 Examples of Google Fonts

7.4 WEB DEVELOPMENT

Web development is the process of taking finished web designs and transforming them into fully functioning, interactive websites. Development is what gives life and movement to static designs and enables users to access the website through their web browsers. This is done by translating the designs into web coding languages that can be interpreted and displayed by browsers.

Learning to code your own website is beyond the scope of this textbook and requires years of practice and some considerable technical know-how. But we can teach you to understand the aspects that go into creating a website, the process that should be followed, and how to help in making key choices about your website.

7.4.1 Assessing your development needs

It is important to identify what your development needs are, as these fundamentally impact the options that are most appropriate to your site's development. Will you use a CMS? Will you need complex content management? Is it for ecommerce, or is it simply a brochure site? For instance, if you're building a small brochure site, you don't need someone to come up with a bespoke development solution.

Content management

The majority of websites today are built using a content management system, or CMS. A web CMS is a software application that assists in managing your digital assets and any form of content for your website. It needs to facilitate the creating, collecting, managing, and publishing of any material for your site.

Managing a website is collaborative and involves various people, in various roles – creators, editors, publishers, administrators and even visitors to your site – working on your site. A CMS provides tools to allow users with little knowledge of web programming languages or markup languages to create and manage website content. A CMS enables a business to manage and update their own website without needing a web developer (Johnston, 2015).

Ideally, the CMS becomes a set of automated processes that facilitate the functioning, updating, and management of your site. Using a CMS means it is cheaper and easier to update, manage, and create new content as web developers are not required for each change. A CMS also allows for the content of websites to be updated from any location in the world by means of signing in to the system.

eCommerce

eCommerce, or electronic commerce, refers to any trading of products or services on the internet. eCommerce sites are necessary

NOTE You will learn more about this in **Chapter 8: eCommerce**.

across a range of businesses, from consumer-based retail, through auction, music, and video subscription sites, to intercorporate trading.

Brochure site

A brochure site is a static site. It provides content that does not need to be updated regularly, and there is very little interaction with the visitor. It is essentially a brochure of a company's offering, providing relevant information and contact details to prospective customers. The site does not 'do' anything. The user cannot interact with it in any way; they are unable to place orders, make payments, or engage with the website.
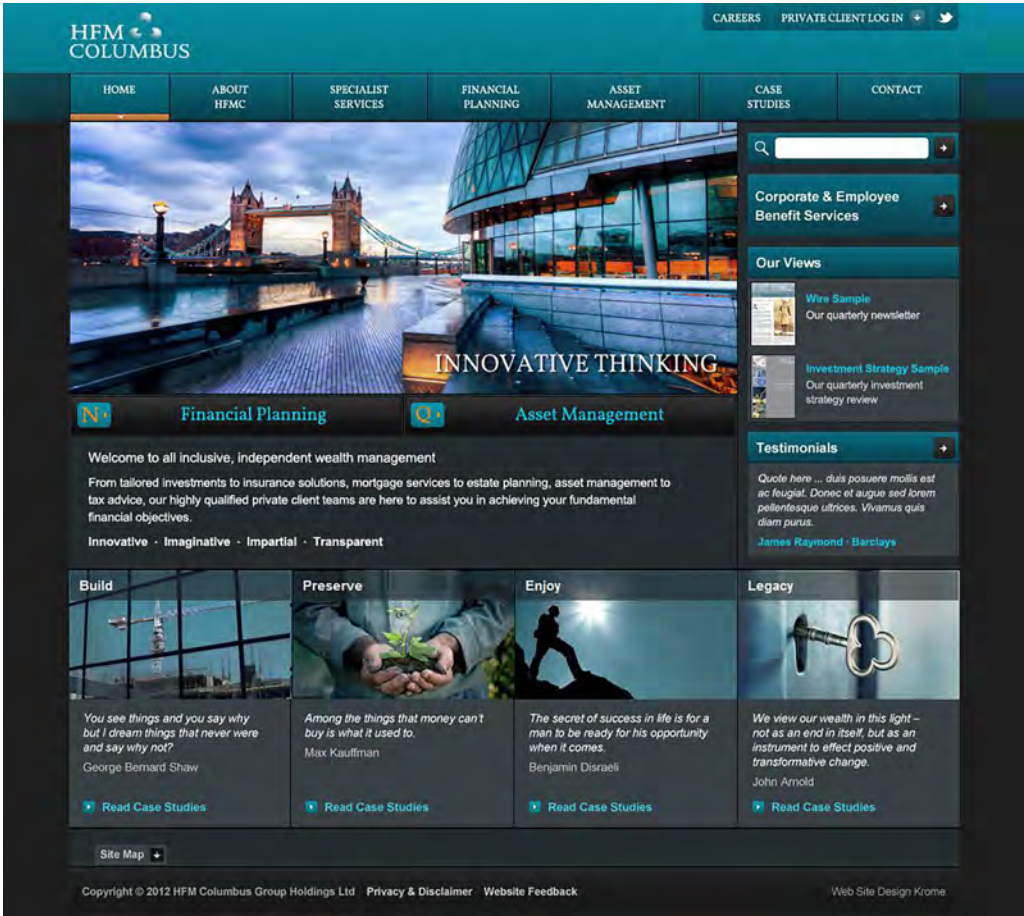
Figure 7.4 Static brochure site

Brochure sites are a means of getting your business an online presence quickly and relatively cheaply, and if it meets all your business requirements, then such a simple site may be sufficient. Consider the limitations of a brochure site before making a choice, as they can be difficult or impossible to build on later.

7.4.2 Development options

When selecting how to proceed with your website development, you have a few options at your disposal. The choice between an off-the-shelf solution and bespoke development comes down to how flexible the off-the-shelf solution is. If too much customisation is required, or it does not support the business's requirements, it may be better and cheaper to develop a bespoke solution.

Off-the-shelf solution

The CMS you choose can be pre-built by an external company or developer. This can be bought like any other software on the market. While this option may provide fewer custom features, it's potentially a more cost-effective option than a bespoke CMS. It is certainly quicker if little customisation is required.

Bespoke development

This involves a CMS that is built specifically for a certain website. This option is highly tailored and customised to your website, and can be more expensive than other options. It is possibly less future proof, as finding alternative agencies to support custom-built code is challenging.

Table 7.2 Advantages and disadvantages of off-the-shelf and bespoke development

Off-the-shelf		Bespoke	
Advantages	Disadvantages	Advantages	Disadvantages
Cheaper	Overly complex with large sections you will never use	Created specifically for the business' needs	More expensive
Sophisticated software due to a wide range of resources input for development	Compromise of features	Tailored and unique	Requires experienced developers to maintain
Easy to find support and literature widely available	Long time to learn and in-house training required	Customised to interface with software you already use	Less future proof as tied to specific agency to maintain
Easy to share files as software widely used and available	Workflow may have to change to meet software design	More intuitive to your business' way of working	Large investment of time for development, testing

No company time needed for specs and testing	Features you need may not be available	More flexible, can be modified and changed as required	Takes much longer to implement
Available sooner	Individual requests to overall developers will not carry weight	Receive better support	Difficult to get support if developer does not provide it
	Long time to have things fixed if through the corporation that developed the software	Provide significant business advantage	Difficult to choose appropriate developer that will provide reliable and stable software
	Difficult to gain competitor advantage	Option to sell application to others (if you own rights)	

Open source vs. proprietary

There are many open source, pre-built CMS options available, some of which are free. Open source means that anyone can see the code that the CMS is built with, anyone can manipulate or improve it and share with everyone else using the CMS. Proprietary, however, refers to code that is protected by copyright. This copyright is held by the developer or the purchaser of the intellectual property (IP). An open-source CMS can be more rudimentary than paid options, but it is easy to tailor to your needs, and there is often a community that can create the solutions you are looking for.

NOTE Since there are so many different CMS platforms out there, read this article that outlines what you should look for in a good CMS: www.wpbeginner.com/showcase/best-cms-platforms-compared/.

Some widely used open-source CMS solutions include:

- WordPress wordpress.com
- Drupal drupal.com
- Blogger blogger.com
- Joomla joomla.org
- Square Space squarespace.com.

NOTE It is wise to indicate whether code is under the protection of copyright. The universal symbol for copyright is ©.

A great CMS platform should have tools for you to easily export your data and move it elsewhere. Remember that no CMS platform comes with all the features you need; extensions and add-ons will fix that problem. You can think of them as your apps for your CMS platform.

Table 7.3 Open source versus proprietary solutions

Proprietary		Open source	
Advantages	Disadvantages	Advantages	Disadvantages
Predictability	Less current, so large investments in legacy systems	Customisation	Upfront cost can be high if you want highly customised product
Plenty of options	Licensing fees	Flexibility	Less 'Out of the box' features and features you need may be expensive to create
Robust and filled with features	Supported only by the company that sells it or its agents	Supported by an online community and not a company	Less predictable support which only happens as needed and not regularly
Relatively cost effective to implement	Lack of customisation	Existing frameworks to work from	Less predictable
	Lack of flexibility	New technology helps to stay up to date with bugs and fixes	
		You own the customised versions	

A CMS should be selected with the goals and functions of the website in mind. A CMS needs to be able to scale along with the website and business that it supports, and not the other way around. Many content management systems have become famous for certain needs.

Examples include:

- **WordPress:** An open-source publishing platform popular with bloggers, and a content management system, known for its simplicity and modifiability. Websites may host their own blogging communities, controlling and moderating content from a single dashboard.
- **Drupal:** Suitable for more complex community and multichannel publishing.
- **Magento:** An ecommerce website platform owned by Adobe that specialises in ecommerce websites.

7.4.3 Development frameworks

The back-end of a website refers to the server-side layer. This layer is hidden from the user's view. The interaction between the user and the back-end is handled via a presentation layer known as the front-end or client-side layer. A website is a marriage between these layers (Ferguson, 2016).

Back-end/server-side languages and frameworks

Server-side languages are the hidden web coding languages that determine how your website works and communicates with the web server and your computer.

When choosing a server-side language, you need to consider:

Cost: The cost varies depending on the language you choose for your web development project; as some are more intricate than others, the developer may charge more. The language chosen may therefore directly influence the salary of the developer. If information is processed where your website is housed, as opposed to on the client's computer, it increases the costs. Some languages also require ongoing website management and maintenance, which is an additional cost to consider.

Scalability: When planning a project where scalability is a factor, consider whether there are developers readily available to write in this language. Also find out if there are supporting libraries and frameworks available that may suit possible changes to your project.

Some of the most common and popular server-side languages include PHP, Java, Ruby, .NET, and Python. Ask your web developer to advise you on the best language for your specific project (Ferguson, 2016). Some common back-end frameworks are Laravel, CodeIgniter, Sympfony, cakePHP, and Zend.

Figure 7.5 Logos for some popular back-end developing languages

Front-end/client-side development languages and frameworks

Web users have come to expect rich, interactive experiences online, and interactive website interfaces are a part of that. Front-end languages, or client-side languages, are languages that are interpreted and executed in users' browsers rather than on the web server.

> **NOTE**
> There are many free resources online that teach you how to code. One is Codeacademy: www.codeacademy.com.

These experiences range from simple animations through to highly responsive interfaces that require input from the user. There are several technologies available to create such experiences, each with its own opportunities and challenges.

As with server-side languages, you need to consider a few properties of the front-end language you want to use. Bear in mind that server-side languages and front-end languages are often used together, as all web projects require front-end languages for development.

Cost: Front-end language development costs are comparatively lower than back-end costs, although rich interface developers often demand premium rates.

Features: HTML, CSS, and JavaScript open-source languages are often used together and are compatible with most hardware and software. Content developed in these is also more search engine friendly. Today, Flash is rarely used despite its interactive multimedia capabilities. In many cases, richer experiences can be achieved with HTML, CSS, and JavaScript. Your most important consideration should always be what your end users will be able to view.

Scalability: Depending on the capabilities of the device executing the language, certain features may not be available, or certain code may run too slowly to create a good user experience. The development of front-end code needs to take all the considered devices into account.

Browser and OS support: With front-end languages, you have to cater for browser and operating system support. A website will look different on each browser and operating system, and this needs to be factored in. If a feature cannot be displayed under certain conditions, workarounds have to be implemented. A rule of thumb in web development is that a website must work on Safari.

Open-source or proprietary software: Any developer can create add-ons for or improve on open-source software, while proprietary software is owned and its use is restricted. It can be cheaper to develop in an open-source front-end language such as HTML. However, as HTML is needed to host all web pages, combinations of open source and proprietary software are sometimes used. This is however, in most cases and for the languages we cover, not a major consideration.

There are several front-end language options to choose from, although the most popular by far is HTML coupled with CSS and JavaScript.

HTML5

HTML is the language for creating websites, and HTML5 is the fifth iteration of the language. It is also the name for a range of technologies that enable modern web browsing features. It's a specification published by the web standards body, W3C, describing what features are available and how to use them. HTML5 is different from proprietary web software, such as Adobe Flash, in that the specification is the result of contributions from many organisations and can be implemented by anyone without having to pay for royalties or licensing fees. You do, however, pay for the development tools provided by the companies.

Figure 7.6 The HTML5 , JavaScript, and CSS logos

HTML5 simplifies many common tasks when building a web page, such as including multimedia content, validating forms, caching information, and capturing user input data, such as date and time.

HTML5 allows browsers to play multimedia content without the use of Flash or a similar plug-in. There is also a technology called Canvas, which allows developers to create rich, interactive experiences without the constraints that came with previous versions of HTML. For example, a 3D animated video can now be played, something that used to require the use of Flash or Silverlight.

The goal is a website that just works, without the need for particular browsers or plug-ins to enable certain functionality. Having a standardised way of implementing common features means that the web is open and accessible to all, regardless of competency.

CSS

CSS stands for Cascading Style Sheets and is a style sheet language used to instruct the browser how to render the HTML code. For example, the plain text on a web page is included in the HTML code, and CSS defines how it will appear. CSS can set many properties including the size, colour, and spacing around the text, as well as the placement of images and other design-related items. CSS pre-processors, such as LESS, SASS, and Stylus are also available to make CSS more easily maintainable and scalable. They allow for more functional CSS compilation. The latest standard of CSS is CSS3. It is backwards compatible with all versions of CSS, and provides many more useful features, such as text effects, 2D/3D transformations, and animations (w3schools, n.d.).

JavaScript

This is the most common client-side language used to create rich, dynamic web properties. Because it is an open-source language, many developers have added functionality that can be more quickly implemented. For example, there are over 1 000 different gallery systems created by JavaScript developers for JavaScript developers.

Frameworks

Frameworks are packages that are made up of a structure of files and folders of standardised code (HTML, CSS, and JavaScript, for example) which can be used as the basis for developing websites. Essentially, frameworks are templates to provide the common structure for websites so that developers don't need to start from scratch each time. Frameworks save a lot of time and money.

Some examples include vue.js, backbone.js, angularJS, emberJS, react.js, and the popular jQuery libraries. Bootstrap has long been the most popular CSS framework, and bulma is also increasing in popularity.

7.4.4 Development best practice

There are multiple ways to design and develop for the web, but it is a good idea to learn from the best in the industry and to follow some best practice guidelines to achieve the best results.

Meta and title tag customisation

The CMS you have either selected or created should allow you to enter your own meta tags for each page, as well as allow full customisation of title tags for each page. It is important to note that Google does not use keyword meta tags for ranking anymore (Lincoln, 2015).

URLs

Instead of using dynamic parameters, the CMS should allow for clean URLs by using server-side rewriting. Clean URLs consist only of the path to a webpage without extra code. A clean URL could look like this: example.com/cats, while an unclean URL could look like this: example.com/index.php?page=cats. It should allow for the creation of URLs that are:

• Static
• Rewritable
• Keyword rich.

Be careful when building clean, descriptive, and dynamic URLs from CMS content. Should you use a news headline, for example, 'Storm', as part of your URL and someone changes the heading to 'Tornado', this will alter the URL and the search engines will index this as a new page, but with the same content as the URL which had the old heading. Bear this in mind before adding dynamic parameters to your URLs.

Customisable navigation

A good CMS will allow for flexibility when creating the information architecture for a website. For the purposes of adding additional content for search engines, a CMS should not require that all content pages be linked to from the homepage navigation. Responsive considerations also need to be in place for mobile devices.

The CMS needs to have good support for managing SEO considerations, such as URL rewriting and avoiding duplicate content issues.

Customisable image naming and alt tags for images: A good CMS will allow you to create custom alt tags and title attributes.

robots.txt management: robot.txt files are .txt files that restrict search engines from indexing certain pages of information. Ensure that you are able to customise the robots.txt to your needs, or that this can at least be managed using the meta tags.

Finally, using a CMS that **supports standards compliant HTML and CSS** is very important, as without it, inconsistencies may be rendered across various browsers. It also ensures faster loading time and reduced bandwidth, makes markup easier to maintain, supports SEO efforts, and ensures that every visitor to a website, no matter what browser they are using, will be able to see everything on the site.

7.4.5 Developing for multiple screens

Accessing the internet has changed drastically over the last few years. Desktop is no longer the only or even primary means of accessing the web. Mobile internet usage surpassed desktop in 2014 and continues to grow year on year, while desktop usage is declining (Chaffey, 2016).

> **NOTE**
> In 2021, the number of mobile users worldwide stood at 7.1 billion, and likely to rise to 7.26 billion in 2022. In May 2022 the number of smartphone users globally was 6.6 billion, which is 83.72% of the world's population (Statista, 2021).

Because of this, it's important for all brands to be accessible on mobile devices. As you learnt in **Chapter 6: User experience design**, mobile devices can fall into a range of categories, and not all mobile devices have the same features and screen size. This means that websites need to be designed to be accessible and are optimised for a variety of screen sizes and devices.

Developing for a variety of screens and mobile requires an understanding of the opportunities and challenges presented by mobile technology. Challenges include the obvious, such as a smaller screen and navigation limitations, different operating systems, as well as more complex issues, like file formats and bandwidth restrictions.

Mobile devices

A mobile device is a small device with computer-like functionality. It allows for an internet connection and various features such as Bluetooth, NFC, wifi, and GPS. These include

smartphones and PDAs (MDN, 2016). Remember, mobile goes beyond just the mobile phone. Also consider tablets, game consoles, netbooks, wearables, and a range of other web-enabled devices.

The constraints with developing for a range of devices

Due to the size constraints of mobile device screens, various considerations must be taken into account to allow your website to render correctly.

Fluid CSS layouts will allow the site to manipulate its contents based on screen size. Additionally, CSS media queries can use target styles for a specific screen width, height, and pixel density.

Working with a touchscreen means that no hover effects will work. Adequate space must be allowed around inputs due to the touch-area of some users' fingers being larger than a mouse cursor.

> **NOTE**
> A great online JPEG/PNG compression tool is tinypng.com. Simply upload your images and let them compress it for you (MDN, 2016).

Images must be optimised for mobile screens and bandwidth restrictions.

Development approaches

Here are some development approaches that you may want to consider:

Specialised mobile development

Mobile devices allow users to access information about your brand on the move. Because mobile penetration is so heavy and many users worldwide will access the internet first and primarily through mobile (Chaffey, 2016), every website needs to be designed with the mobile device in mind. Mobile website interfaces demand a simpler approach and a consideration of screen size and input method. A specific design for various mobile screen sizes in the form of an adaptive design may be an option. However, Google prefers responsive to adaptive sites, so creating an adaptive site may not be in your business's best interest, in terms of SEO.

A native mobile app is software designed to help users perform particular tasks. Examples include a tool for checking the weather, a fuel calculator, or an airlines app to check-in or to track flight progress.

Mobile apps can be sold or made available for free. Many developers create apps to derive an income, while free apps that offer users value are often sponsored by brands or advertising. An app can be an excellent tool for connecting with your customer.

The key difference between native applications and mobile-optimised websites is that native applications are designed for particular handsets and operating systems and have to be downloaded to the mobile device. Mobile-optimised websites can be accessed using any internet-enabled mobile device. That said, mobile apps can allow for more integration with the device and hence a better user experience, depending on the complexity of the functionality.
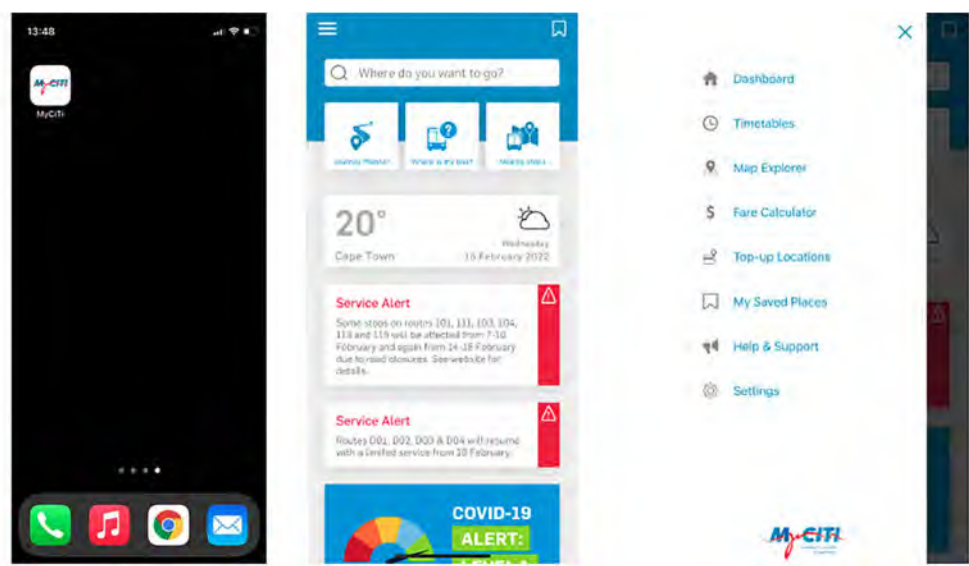
Figure 7.7 An example of a branded app from the iTunes App Store

It is a good idea to focus on mobile-optimised sites when targeting a broader group and building an application when wanting to reach a niche or targeted audience.

> **NOTE**
>
> Read more about mobile optimisation in **Chapter 16: Direct marketing: Email and mobile.**

Some brands still create a separate mobile site just for their mobile users, but this is falling out of fashion as internet access via mobile increases. Google recommends responsive sites as best practice.

A responsive site

A responsive website is a website that changes its layout depending on the device it is displayed on so it looks one way on a desktop computer, but then adapts to the smaller screen size and layout on a tablet or mobile phone. In this way, a single development project can cater for multiple device form factors.
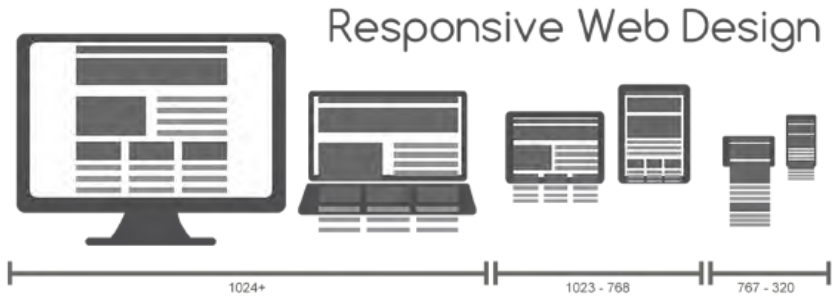
Figure 7.8 Responsive web design across a range of devices

A responsive website is not the same as an adaptive website. A responsive site uses the browser's screen space to determine how to reflow the original design content that was probably optimised for desktop, while an adaptive site provides a specifically tailored design for the device you are using. Designing an adaptive site requires multiple fixed layout sizes, usually the six most common screen widths. The relevant one is deployed depending on the screen size of the device.

Many users prefer responsive design as it provides familiarity, uniformity, and seamlessness, which are important considerations in user experience (Soegaard, 2021). Responsive design should be mobile friendly. This helps to maintain usability when reflowed for a mobile device's screen.

Adaptive designs are more labour intensive and more expensive. As an approach, it's being used less and less. Although industry professionals often prefer adaptive sites, industry preference won't translate into higher listings on SERPs, while Google's ranking methodology favours responsive design.

Creating a responsive website means you only need to build one website for the full range of devices, from desktop to mobile. This can be a technically challenging exercise and will require a lot of planning upfront to make sure that the site displays correctly on each device.

> **NOTE**
>
> Try visiting roxik.com/cat/ and resize your browser to see the cat change shape based on the screen width. This is a great illustrative example of a fluid responsive layout.

Here is a table that compares the relative strengths and weaknesses of each option. There's no right or wrong answer on which one to pick. Choose the option that best suits your brand, target audience, and digital objectives.

Table 7.4 Strengths and weaknesses of responsive and adaptive sites

	Strengths	Weaknesses
Mobile-specific adaptive sites	• Design best suited to screen size • More aesthetically pleasing and provide better UX • Fully optimised for mobile	• Google prefers responsive sites • Need at least 6 different specific screen-size designs • Expensive • Labour intensive
Native app	• Versatile and creative tools can be created • Interactive and fun • Can create real added value through innovative approaches • Not possible via a web browser	• Doesn't work on feature phones • Different versions needed for different phone makes and models • Entirely different and complex development process

Native app (cont)	• Ideal for frequently repeated or routine tasks	• User needs to choose to download them
	• Promote brand loyalty	• Users without additional phone storage may not have enough space to install the app
	• Enables access to core phone functions, such as GPS, camera, etc.	
	• Could generate income as a 'paid application'	• All apps must go through formal app stores and need to be approved in some instances
	• Performance benefit in some cases	• Changes need to be released through version updates
Responsive site	• Device is an 'agnostic' solution	• Could be complex to develop
	• One consistent site accessible across many devices	• Site needs a lowest common denominator approach to cater for all devices
	• One data set to work from	
	• Future-proof option that will work on most devices	• May not work correctly on all sizes and shapes of devices
	• Preferred by Google and scores highly in algorithms for SEO	• No agreed standard way to develop responsive sites
	• Users prefer the uniformity and consistency from responsive sites used across devices	

Designing for multiple screen sizes

Designing a site that will display consistently across multiple devices and screen sizes is difficult, but understanding and sticking to web standards will bring you closer to this goal.

Design your site so that the information your users want is not only on display, but also easy to get to. The limited screen space is valuable, so you can't necessarily have the full site navigation on every page. Well thought-out information architecture is essential ensuring that you make the most logical use of navigation in line with what your site visitors need.

Standards

There are few standards currently in place to ensure your design will be optimised across multiple screens. It is still not entirely possible to create content including images, text, and beyond that can be correctly formatted on most mobile devices, or at least legible on phones where formatting is flawed. There is a certain amount of trial and error involved in designing a site optimised across a variety of devices. However, the process is certainly worth it. There are 4.7 billion unique mobile subscribers, and the majority of these are accessing the mobile web (GSMA Intelligence, 2016).

Web standards are managed by the W3C. The standards were created to promote consensus, fairness, public accountability, and quality. Complying with web standards means the site uses valid code and adheres to stipulations from the W3C. Read more about web standards at www.w3.org/standards/about.html.

Mobile handset emulators allow you to see how your work-in-progress website will be formatted, depending on which device you are emulating. It has been suggested that nothing can replace testing on actual mobile devices, so if you are doing the testing, recruit contacts with different handsets to show you the difference in display.

Some emulators are:

- BrowserStack: browserstack.com
- TestiPhone: testiphone.com
- Mobile phone emulator for Samsung, iPhone, and other: mobilephoneemulator.com
- Safari on the iPhone can be tested with IOS simulator.

Responsive design

Responsive websites are designed for a range of screen widths. When deciding whether to create a responsive site or adapt desktop sites, consider your customer first:

> **NOTE**
> Read more about responsive web design here: colorwhistle.com/a-guide-to-responsive-website-design/.

- How much of your website traffic comes from specific mobile devices? If this is a large percentage, consider building a responsive site designed for optimal viewing on mobile screen sizes.
- Do your desktop users have the same goals as your mobile users? Here you need to keep in mind your CTAs and drop-down menus. Ensure they can be accessed correctly by the relevant device.
- What is your budget and how quickly do you need your website to be built? Responsive websites take a while to build and can be expensive. You could save money long term by going this route, but there is a sizeable upfront investment.
- Do you have an existing site, and can it be converted into a responsive website, or will it need to be rebuilt? (Du Plessis, 2012).

Responsive design comes with a fair bit of terminology, but you should be familiar with three key concepts, namely flexible grids, media queries, and flexible images:

> **NOTE**
> Before you continue reading, check out this video on creating simple flexible grids in CSS using flexbox: www.youtube.com/watch?v=sYASH-3iGNQ.

Flexible grid

Typical websites are designed as large, centred, fixed-width blocks. With responsive design, the page elements, such as the heading, the text or copy, the main image, and other blocks of information are arranged in a grid of columns that have predefined spacing. Each element relates proportionally to the other elements. This allows elements to rearrange or resize in relation to each other whether the screen is tiny or huge and the screen quality is high or low. Although this system allows for flexibility, an extremely narrow screen can cause the design to break down. In this case, we can make use of media queries.

Figure 7.9 Flexible grid used in responsive design

Media queries

Media queries are bits of code that allow websites to ask devices for information about themselves. The website style that will suit the device best is then selected from a list of styles defined in a CSS. Media queries ask for information about the device's browser window size, orientation (landscape or portrait), and screen display quality.

Flexible images

Images are designed to move and scale with the flexible grid. An important consideration is how fast the website loads. High-quality images are therefore made available for larger screens, and lower-resolution images are made available for smaller screens. Parts of images can also be displayed for smaller screens to

> **NOTE**
>
> Is responsive design right for your company or client? See how some companies tackled this question here: www.zdnet.com/does-your-companys-website-need-responsive-design-7000021417.

maintain image quality. Images can even be hidden completely. Image optimisation is done in CSS, which queries the screen height, width, and pixel ratio of the device and then adjusts the images accordingly (MDN, 2016).

For more information about responsive websites watch Methods for mobile (Responsive vs. Adaptive) from Brian Wood Training: www.youtube.com/watch?v=IgojC1D3QpU.

7.5 THE WEB DEVELOPMENT PROCESS

This section discusses the process of building a website from the client's perspective.
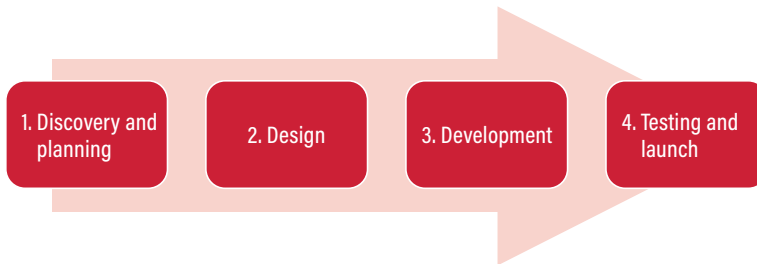
Figure 7.10 The web development process

Step 1: Discovery and planning

Planning a website starts with research focusing on your market, your users, your competitors, and your business. If you already have a website, you can use existing web

> **NOTE** Have a look at **Chapter 3: Market research** for a detailed discussion of this.

analytics data to understand how well you are meeting your users' needs. It's also worth running some user labs to watch how users interact with your existing site.

> What are your business objectives?
> How should this digital property help you to achieve those objectives?

> Who are your users?
> Your potential customers?
> What problem does your website need to help them solve?

Business questions
Should it, for example, generate leads for you to follow up?
Is it an ecommerce store?

Questions about users
Should it, for example, collate travel information in one place, such as www.tripit.com?

Figure 7.11 Key questions to be asked when building a website

This research helps you plan your website strategically, ensuring that it is aligned with both user needs and business objectives.

> **NOTE** Read more on users in **Chapter 6: User experience design.**

In research and planning, you should also reach an understanding of what tasks or actions users need to do on your website. These are usually in line with your business objectives. Some tasks a user may need to do include checking the availability of a hotel, signing up to a newsletter, or printing information.

Before any web design project starts, decide what browsers, operating system, and devices you will develop for. For browsers, you usually use the latest, plus one before. For devices, iOS and Android are quite different, so if you are optimising for both, it can be quite expensive. Technology moves so fast; you can hardly keep up with all the latest OS and devices.

Choosing a domain name

Domain names are important. They are part of the URL of a website. A domain name looks something like this: www.mycompany.com.

A lot more information can be included in this. Domain names can carry the following information: subdomain.domain.tld/directory

*   **Domain:** The registered domain name of the website
*   **Subdomain:** A domain that is part of a larger domain
*   **TLD:** The top level domain, uppermost in the hierarchy of domain names
*   **Directory:** A folder to organise content.

The TLD can indicate the country in which a domain is registered and can also give information about the nature of the domain:

.com: The most common TLD

co.za, .co.uk, .com.au: These TLDs give country information

.org: Used by non-profit organisations

.gov: Used by governments

.ac: Used by academic institutions.

Domain names must be registered, and, in most cases, there is a fee for doing so. Many hosting providers will register domain names on your behalf, but you can also do it yourself. Domain names should be easy to remember, and, if possible, include important search keywords for your business. For example, if you were building a website for your restaurant named Omega, www.omegarestaurant.com could be a better choice than www.omega.com as it contains the important keyword 'restaurant'.

UX and content strategy

You also need to gather, analyse, and map out what content is needed on the website. This content is then structured in a process called

NOTE

Review **Chapter 6: User experience design**.

information architecture. A sitemap should reflect the hierarchy of content on the website and the navigation (how users make their way through a website).
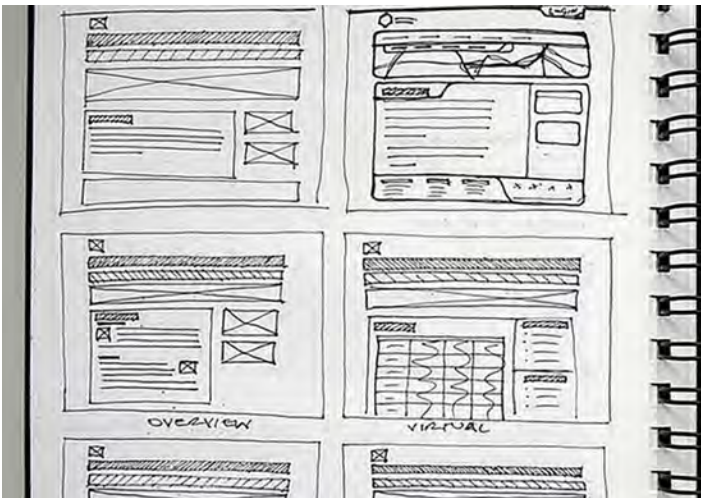
Figure 7.12 A sketched wireframe of what the webpages will look like and how they will link to one another
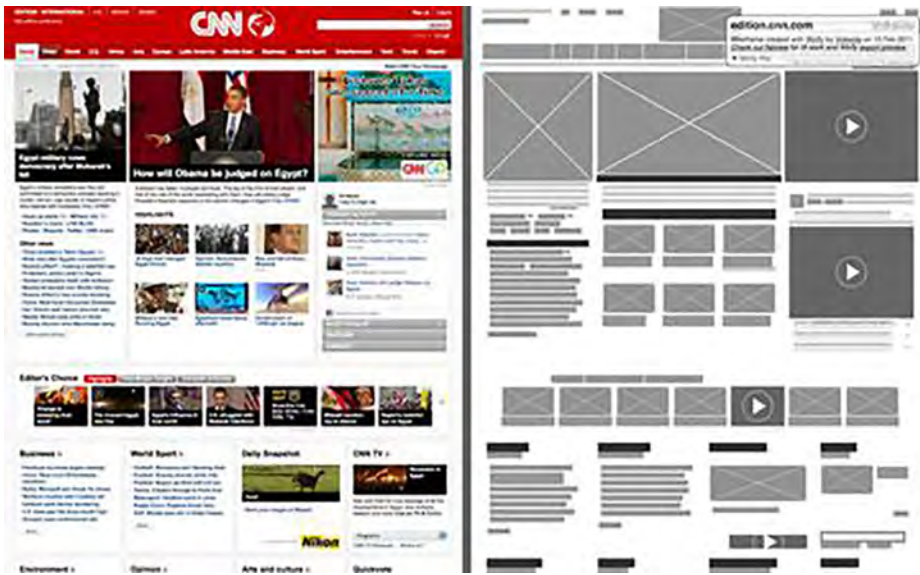
Figure 7.13 An example of a wireframe against what the final website looks like

At the same time, consider what content you want to include on your site. Will it be a relatively static site that doesn't change often, or will you need an editable CMS to regularly add and update content, such as blog posts, images, and products?

Should the website be large enough to require it, a functional specification document should be created, using all the information compiled so far. This document should detail the development requirements for the website and can be used to communicate any specific design constraints.

It's now time to move on from planning to building.

> **NOTE**
>
> See this link (designmodo.com/wireframing-prototyping-mockuping/) for a good explanation about the differences between wireframing, prototyping, and mocking up.

> **NOTE**
>
> Have a look at the discussion on choosing a static versus a CMS website earlier in this chapter.

Search engine visibility

Search engine traffic is vital to a website; without it, the chances are that the site will never fulfil its marketing functions. It is essential that the search engines can see the entire publicly visible website, index it fully, and consider its relevance for its chosen keywords.

Search engine optimisation (SEO) has its own chapter in this textbook (Chapter 5), but here are the key considerations for web development and design.

In web development, the copy that is shown on the web page needs to be kept separate from the code that tells the browser how to display the web page. This means that the search engine spider will be able to discern easily what content is to be read and therefore scanned by the spider, and what text is an instruction to the browser. Cascading Style Sheets (CSS) can take care of that.

If the search engine cannot see the text on the page, it means that it cannot crawl and index that page.

Step 2: Design

Design usually happens before development. According to the steps explained earlier in this chapter, the designer will transform the wireframes and basic planning materials into beautifully designed layouts. These are static images that show how the website will look once it's coded.

Step 3: Development

The development phase usually kicks in once the design is finished. Developers will sometimes start their involvement as early as the wireframe stage by creating low-fidelity prototypes to support the user-testing process. Normally, the developer uses the design templates to code the actual website, using the front-end language that you have chosen. Server-side development and CMS considerations may also be part of this phase.

Step 4: Testing and launch

Once you have planned an amazing site, designed it beautifully, built it skilfully, and filled it with fantastic copy, it's time to test it and then take it live!

Testing is an important part of website development and design, and it should take place throughout the process of planning, designing, and building, leaving just final quality assurance (QA) testing before the site goes live. Test subjects should be real potential users of the website, not just members of the development team. The site needs to be tested in all common browsers and devices to make sure that it looks and works as it should across all of them. All links should be tested to make sure that they work correctly, and it's always a good idea to get a final check of all of the copy before it goes live.

Tools such as W3C's HTML validator, validator.w3.org should be used to validate your HTML. See more about testing in **Section 7.7 Quality assurance**.

Make sure your web analytics tracking tags are in place, after which it will be time to take your site live. Now, you need to move on to driving traffic to your newly launched site. That is where all the **Creating** tactics in this textbook come in handy.

> **NOTE**
>
> Read more about this in **Chapter 20: Tracking and analysis**.

7.6 DEVELOPMENT METHODOLOGIES

There are different approaches to building a website. The one described in this chapter (**Section 7.5 The web development process**) is the waterfall process, where one step follows the other. This is in contrast with other methods, such as the agile methodology, which involves faster iteration and greater collaboration, but doesn't afford clients as much control and upfront clarity on the deliverables and timelines.

Discover

Business
requirements

Design

Technical
design

Develop

Coding &
testing

Test

Client OK
& launch
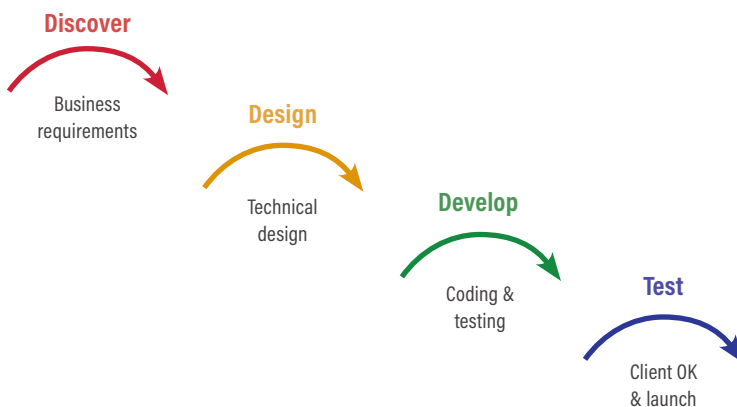
Figure 7.14 The waterfall method

The Agile method is a series of sprints, and involves working through iterative, incremental cycles. Agile methodology is more collaborative, less rigid and requires incremental investments. It often results in being able to release the final product to the market faster. The collaborative approach means that instead of handing over the project to the next person in the chain, you work together catching any issues and working on each iteration as you move through each process. The Agile method often involves scrum methodology and requires (or at least tries for) each sprint to produce something that has an increment of product functionality (Joel, 2015).

> **NOTE**
> Read more about scrum methodology here: www.scrumalliance.org/why-scrum.
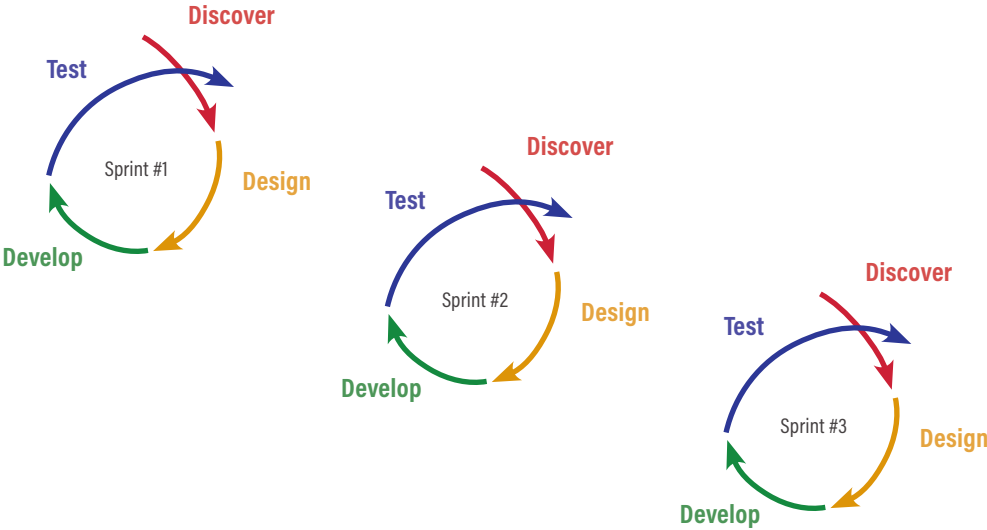
Figure 7.15 The Agile method

Careful consideration of the specific project, the goals, and ultimately, the client's needs, will decide which of these methods is appropriate for a specific project. The method chosen should be the one that will best fit the required project goals.

7.7 QUALITY ASSURANCE

The software development cycle has one final step before the website goes live: quality assurance. This is often referred to as QA. It is a crucial step to ensure that website delivery is of the highest standard and that the client expectation is in line with the agreed Statement

> **NOTE**
> Be sure to factor in enough time to do QA at various points in the development process. This will prevent a bottleneck of issues at the end of the line.

of Work. This step is independent of the design and development phases and involves various end-user test cases. Test cases ensure that the graphical user interface (GUI) promotes a great user experience (UX). QA involves two steps: functional and user-interface testing (Thompson, 2015).

7.7.1 Functional testing

This involves testing the features of a website to ensure that they are working correctly. Functional testing should be done early in the development cycle as it speeds up development, increases quality, and reduces the risk of errors towards the end of the project. Testing can take place either manually by a tester or be completely automated using an application (AppPerfect, 2016).

7.7.2 User interface testing

This is the process of testing whether users can engage with the site as envisioned during development. It also includes testing all features, such as screens with controls, menus, dropdowns, buttons, icons, toolbars, dialogue boxes, forms, and all other user interface features on the site.

User interface testing is crucial as it is the users' experience of the site that will determine if they will or will not use the site or application in the future. If an interface is not intuitive and is

| NOTE | You can read more about GUI testing at www.guru99.com/gui-testing.html. |

difficult to understand, users are unlikely to use that product again. Testing is essential.

The following should be checked during GUI testing:

- ✓ Can users input the necessary information into the user fields?
- ✓ Does the feature execute the desired function when activated?
- ✓ Are error messages displayed correctly and for the correct function?
- ✓ Is the font appropriate?
- ✓ Is the text aligned?
- ✓ Are the colours and fonts, and even error messages, visually appealing?
- ✓ Are the images clear and displaying correctly?
- ✓ Are the images correctly aligned, and do they appear where they are supposed to?
- ✓ Are the GUI elements positioned correctly for different screen sizes and resolutions?

Figure 7.16 QA checklist

7.7.3 Cross browser and device testing

With the myriad of browsers and devices available, developers need to ensure that their websites render acceptably across all of them. Perfection is extremely difficult as each browser and device renders a website slightly differently. To ensure compatibility, developers write cross-browser code. If a feature is not supported, a fallback must be in place to ensure that it degrades gracefully.

If you are deploying your site across a range of devices, each version needs to be checked. And if the site is designed to be responsive, check the GUI across a range of devices to test the responsiveness of the design and that all the elements work across the various devices and possible views.

Test websites on different browsers and operating systems, for example Google Chrome on IOS and Google Chrome on Android devices. Various tools are available to assist in this process, one being BrowserStack (browserstack.com). BrowserStack allows you to test various operating systems and devices from within your browser (MDN, 2016).

7.8 CASE STUDY: OFFSPRING

Offspring is a UK-based shoe retailer.

OFFSPRING

One-line summary

Offspring, a UK-based sneaker store, wanted to increase mobile conversion and mobile revenue, and to achieve this, they moved to a responsive design website.

The problem

Offspring had no mobile website, and mobile users were having a poor user experience when accessing the site on their devices. This caused poor conversion rates and low revenue for mobile.

Mobile users are the largest growing online market and Offspring witnessed a consistent increase in mobile traffic to their website. Their current site was not mobile friendly and was not providing a good user experience. This was also impacting their SEO score. Offspring knew they needed ensure that mobile users had a good user experience to improve conversions, revenue, and SEO.

The solution

Offspring considered a mobile-friendly site, but decided to opt for a fully responsive site to provide an optimised viewing experience irrespective of the device used to access the site. Offspring wanted to ensure that tablet users were also catered for in the design.

In addition the brand wanted to ensure that they provided existing customers with a familiar look and feel so that they could still easily access and navigate the site.
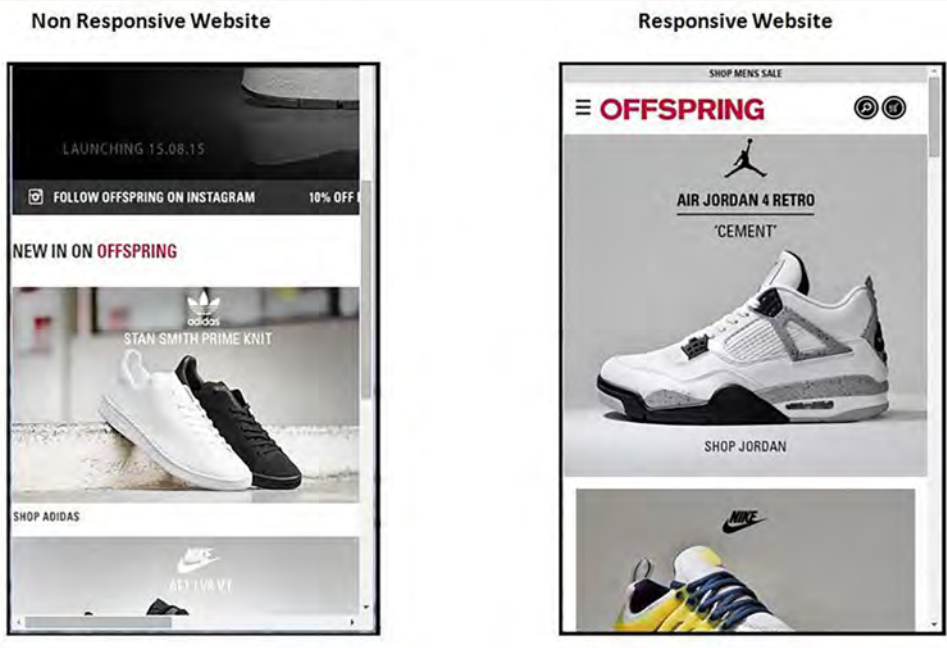
Figure 7.17 Offspring's responsive vs. non responsive site

Certain key design features were included to improve user experience. A new 'sticky' header was included that followed users down the page as they scrolled, providing easy navigation without having to scroll back to the top each time.

Other design features included:

- A new product listing page that was three columns wide on a desktop that could automatically scale down to two or one depending on the size of any different device used.
- New image view and selection process was included on the product detail pages.
- A 'Don't forget' section was included on the basket page so that users could automatically add items to their respective carts.
- An improved checkout process was created with new delivery options.

The intuitive navigation process was crucial to ensuring that users on any device would be able to find the information they needed – quickly and easily.
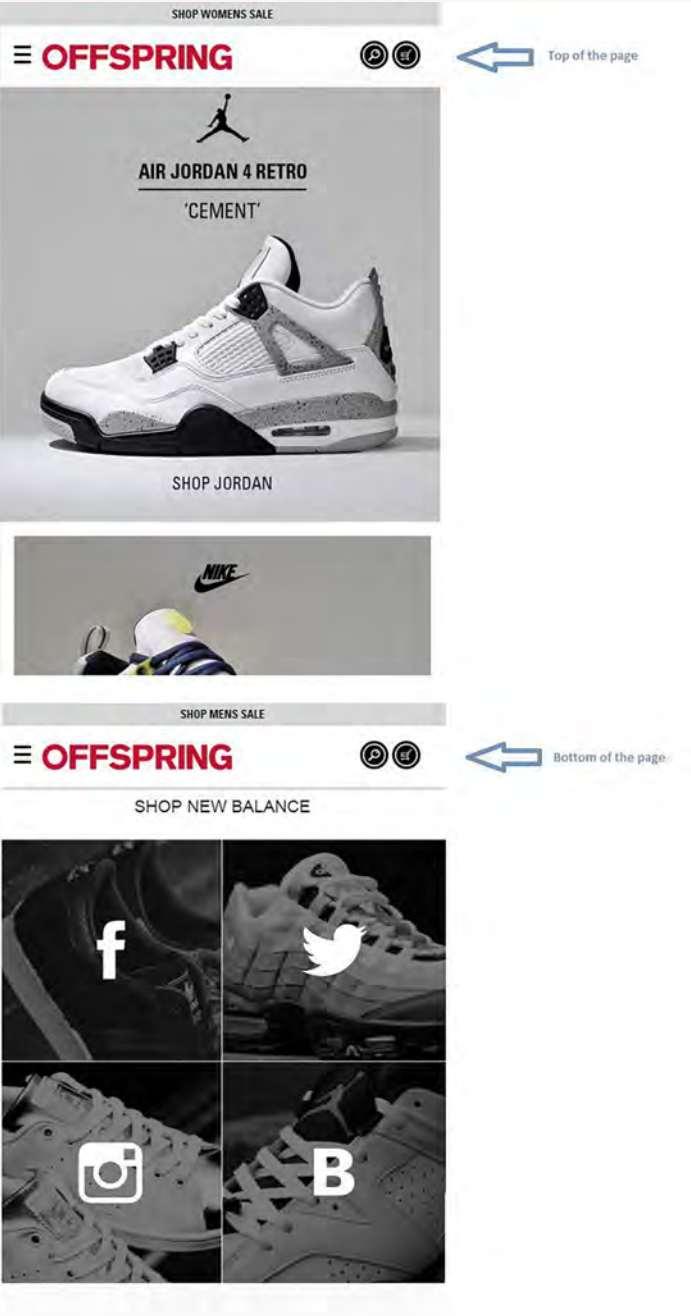
Figure 7.18 Mobile friendly elements of Offspring's new responsive design

A new search bar was included with predictive search. This allowed users to search for their product more quickly.
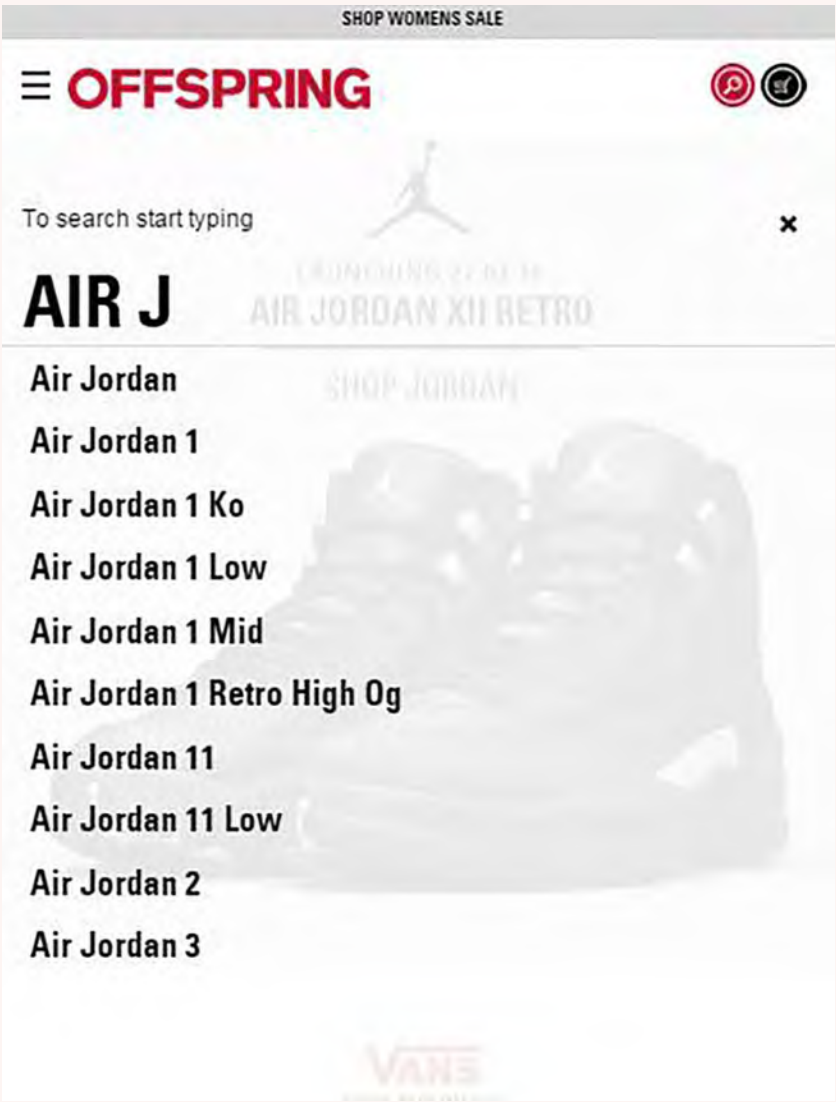
Figure 7.19 Search bar with predictive search on new responsive site

The results

Users spent more time on the site, which led to an increase in conversions and sales. The SEO visibility of the site showed dramatic improvement after moving over to the responsive site mainly due to the mobile site usability score on Google rocketing from 60/100 to 100/100. This saw organic traffic to the site increasing by over 25%.

Figure 7.20 Offspring's growing SEO visibility score

Revenue increased as well, with:

*   A 15.19% increase in mobile/tablet conversion rate
*   A 102.58% uplift in mobile/tablet revenue year on year
*   A 20.35% increase in the ecommerce conversion rate from tablet users alone.

7.9 CASE STUDY QUESTIONS

1. When deciding on which type of site to choose, why did Offspring opt for a responsive site?
2. Which two elements of the responsive design were most important in optimising the user experience across a variety of devices?
3. Would you have made the same design decisions? Are there any further considerations you would have designed for?

7.10 THE BIGGER PICTURE

Web development and design can be seen as the thread that holds digital marketing together. After all, websites are the first thing we think of when talking about the internet.

With the crucial role that search engines play in the way people explore the internet, web development and design go hand in hand with SEO. Online advertising campaigns, social media channels, email marketing newsletters, and even affiliate programs lead people to click

through to your website and sometimes to a customised landing page. That's web design jumping into the mix again.

Setting up analytics correctly on your website is also essential to managing and monitoring your marketing success.

Successful website development and design is all about the right preparation, and the resulting website usually forms the foundation of any digital marketing to follow. Make sure you understand your users' needs, and that you're building on a strong base.

7.11 SUMMARY

Successful websites come from strong planning with a focus on user needs. Websites should be built to be accessible and usable, search engine optimised, and shareable.

Key considerations include:

- Designing your website according to best practices, following the process of developing a website from start to finish.
- Developing a strong, stable, and usable website.
- Creating a suitable mobile web experience for your users.
- Enhancing user experience through design and guiding a visitor seamlessly through a website, as opposed to distracting visitors from their goals.
- Ensuring consistency in visual messaging across all properties.
- Supporting a wide range of web browsers and mobile devices.

7.12 CHAPTER QUESTIONS

1. What are some key design elements you would ensure were included when designing a website?
2. Why is it so important to realistically assess the needs of your site before development?
3. What do you think are the biggest challenges for optimising your design across multiple devices?
4. What, to you, is the most important step in web development?
5. What role does a website play in an overall digital marketing strategy?

7.13 FURTHER READING

alistapart.com – A website for people who make websites, A List Apart has regular articles from web designers and developers on building user-friendly, standards-compliant websites.

frontendfoc.us – A weekly newsletter filled with the latest must-know HTML5 tips and trends.

smashingmagazine.com – A website for web designers and developers.

7.14 REFERENCES

AppPerfect, 2016. Web functional Testing. [Online]
Available at: www.appperfect.com/products/web-testing/functional-testing.html
[Accessed 11 May 2022]

Bankmycell, 2022. HOW MANY SMARTPHONE USERS IN THE WORLD? [Online]
Available at: www.bankmycell.com/blog/how-many-phones-are-in-the-world
[Accessed 30 May 2022]

Bohan, D., 2019. What Is a Content Management System and How Does It Work? [Online]
Available at: www.bloomreach.com/en/blog/2019/content-management-system
[Accessed 15 February 2022]

Bradley, T., Creating simple flexible grids in CSS using flexbox. [Online video]
Available at: www.youtube.com/watch?v=sYASH-3iGNQ
[Accessed 30 May 2022]

Buyvoets, R., D. 2015. How color effects shopping habits. [Online]
Available at: medium.com/@rodgerdwightbuyvoets/how-color-affects-shopping-habits-36141daf4c49#.
p9cofoymc
[Accessed 11 May 2022]

Chaffey, D., 2021. Mobile marketing statistics compilation 2021. [Online]
Available at: www.smartinsights.com/mobile-marketing/mobile-marketing-analytics/mobile-marketing-
statistics/
[Accessed on 11 May 2022]

Chopra, P., 2010. Lessons Learned from 21 Case Studies in Conversion Rate Optimization. [Online]
Available at: moz.com/blog/lessons-learned-from-21-case-studies-in-conversion-rate-optimization-10585
[Accessed 17 February 2022]

Ferguson, N., 2021. What's the Difference Between Frontend and Backend Web Development? [Online]
Available at: blog.careerfoundry.com/web-development/whats-the-difference-between-frontend-and-
backend
[Accessed 11 May 2022]

Fisher, S., 2012, Create a website style guide. [Online]
Available at: www.creativebloq.com/design/create-website-style-guide-6123030
[Accessed 11 May 2022]

GSMA Intelligence, 2016. [Online]
Available at: gsmaintelligence.com
[Accessed 11 May 2022]

Hamilton, T., 2022. GUI Testing Tutorial: User Interface (UI) TestCases with Examples. [Online]
Available at: www.guru99.com/gui-testing.html
[Accessed on 11 May 2022]

Joel, 2015. A Designer's Introduction to "Agile" Methodology. [Online]
Available at: webdesign.tutsplus.com/articles/a-designers-introduction-to-agile-methodology--
cms-23349
[Accessed 11 May 2022]

Johnston, M., 2011. CMS or WCM – Which is Which?
Available at: www.cmscritic.com/cms-or-wcm-which-is-which/
[Accessed 25 October 2016]

KISSmetrics, 2010. How Do Colors Affect Purchases? [Online]
Available at: blog.kissmetrics.com/wp-content/uploads/2010/08/color-purchases-sm.png
[Accessed 11 May 2022]

Lincoln, J.E., 2020. How to Optimize Google Meta Tags for SEO. [Online]
Available at: ignitevisibility.com/google-meta-tags-for-seo-what-does-google-actually-understand/
[Accessed 11 May 2022]

Moz, 2016. Case Study: Here's How Moving to Responsive Design Website Helped Our Brand. [Online]
Available at: moz.com/ugc/case-study-heres-how-moving-to-responsive-design-website-helped-our-brand
[Accessed 15 February 2022]

Mozilla Development Network (MDN), 2016. Mobile Web Development. [Online]
Available at: developer.mozilla.org/en-US/docs/Web/Guide/Mobile
[Accessed on 11 May 2022]

Oamkumar, R., 2018. Advantages and Disadvantages of ASP.NET. [Online]
Available at: www.software-developer-india.com/advantages-and-disadvantages-of-asp-net/
[Accessed on 14 February 2022]

O'Dea, S., 2021. In Statista. [Online]
Available at: www.statista.com/statistics/218984/number-of-global-mobile-users-since-2010/#:~:text=In%202021%2C%20the%20number%20of,projected%20to%20reach%207.49%20billion
[Accessed 22 May 2022]

Oracle, n.d. Java. What is Java technology and why do I need it? [Online]
Available at: www.java.com/en/download/whatis_java.jsp
[Accessed 11 May 2022]

Prestianni, T., 2020. Website Quality Assurance, Protect Your UX. [Online]
Available at: www.unleashed-technologies.com/blog/2015/04/30/what-quality-assurance-web
[Accessed 25 October 2016]

Robbins, Z., 2015. Proprietary vs. Open Source Content Management System. [Online]
Available at: www.viget.com/articles/proprietary-vs.-open-source-content-management-systems
[Accessed 24 October 2016]

SeekDotNet, 2011. 12 Advantages of ASP.NET. [Online]
Available at: www.seekdotnet.com/blog/asp-net/12-advantages-of-asp-net
[Accessed 11 May 2022]

Sharp, E. 2014. Why A Brochure Website Doesn't Work Anymore. [Online]
Available at: www.protofuse.com/blog/why-brochure-website-doesnt-work-anymore/
[Accessed 11 May 2022]

Soegaard, M., 2021. Adaptive vs. Responsive Design. [Online]
Available at: www.interaction-design.org/literature/article/adaptive-vs-responsive-design
[Accessed on 17 February 2022]

Wikipedia, 2015. Typekit. [Online]
Available at: en.wikipedia.org/wiki/Adobe_Fonts
[Accessed 11 May 2022]

wpbeginner, 2022. 15 Best and Most Popular CMS Platforms in 2022 (compared). [Online]
Available at: www.wpbeginner.com/showcase/best-cms-platforms-compared/
[Accessed 30 May 2022]

7.15 FIGURE ACKNOWLEDGEMENTS

Figure 7.1: Double Knot, brand identity, 2022

Figure 7.3: Stokes, 2013

Figure 7.4: Screenshot, HFM Columbus homepage, 2017 www.hfmcolumbus.com

Figure 7.5: Logos: Coffeescript, .NET, Java, Python, php, RAILS, Caml, AS

Figure 7.6: Logos: HTML, JavaScript, and CSS

Figure 7.7: MyCiTi app (available on iTunes App Store)

Figure 7.8: Interaction Design Foundation, 2017 www.interaction-design.org/literature/article/adaptive-vs-responsive-design

Figure 7.9: igentics, 2017

Figure 7.12: Onextrapixel, 2010

Figure 7.13: Wirify, 2022 www.wirify.com

Figure 7.14 and Figure 7.15: Adapted Evatotuts+, 2015 webdesign.tutsplus.com/articles/a-designers-introduction-to-agile-methodology--cms-23349, 2022

Figure 7.17 – 7.20: moz.com/blog/case-study-heres-how-moving-to-responsive-design-website-helped-our-brand, 2022

Logo Offspring: offspring.co.uk

08

eCOMMERCE

In this chapter you will learn:

- About the various types of ecommerce
- About ecommerce on specific channels like mobile and social
- About ecommerce across multiple channels
- How to set up an ecommerce site.

8.1 INTRODUCTION

While credit cards and online shopping are often associated with the term ecommerce, the field encapsulates all digital transactions. This includes the buying and selling of goods and services and the transfer of funds and data.

The explosive growth of ecommerce in recent years can be attributed to the ever increasing reach of the internet, the development of faster internet speeds, and the convenience afforded by ordering things online. Hunting and comparing prices from the comfort of your chair is often more enticing than going from store to store.

According to Statista, in 2021, ecommerce sales worldwide amounted to $4.9 trillion dollars, and this is forecasted to increase to over $7 trillion by 2025.
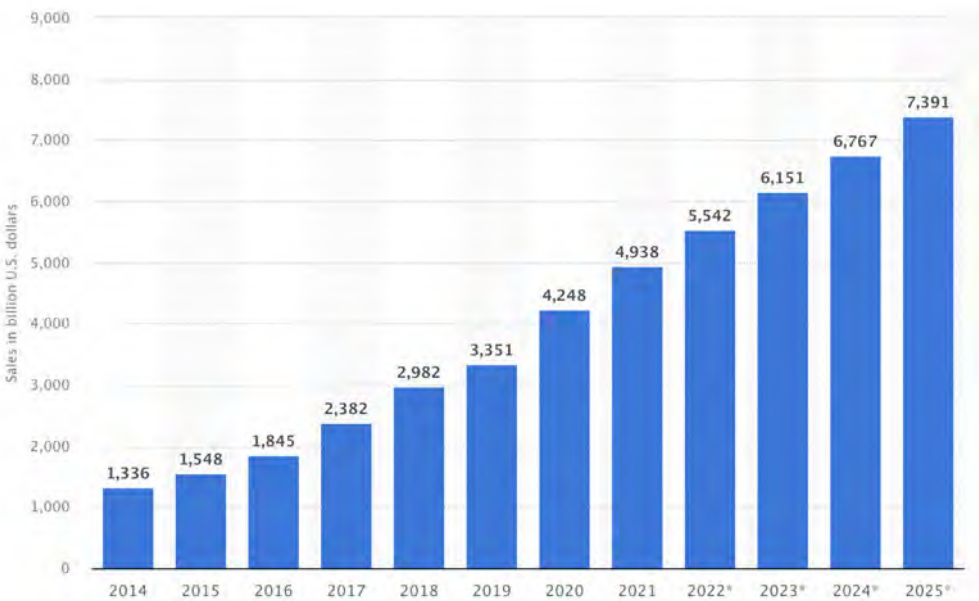
Figure 8.1 Retail ecommerce sales worldwide from 2014 to 2025

It has been estimated that COVID-19 accelerated the shift to ecommerce by five years. According to the PwC June 2021 Global Consumer Insights Pulse Survey, these trends appear to be sticking beyond the acute stage of the pandemic.

NOTE

Read PwC's June 2021 Global Consumer Insights Pulse Survey here: www.pwc.com/gx/en/consumer-markets/consumer-insights-survey/2021/gcis-june-2021.pdf. This report contains lots of important information pertaining to ecommerce, m-commerce, and s-commerce.

8.2 KEY TERMS AND CONCEPTS

Table 8.1

Term	Description
eCommerce	The buying and selling of products and services, including funds and data, electronically.
B2C	Business to consumer, where a business sells products or services directly to the consumer.
B2B	Business to business, where a business sells products or services to another business, such as the relationship between manufacturers and distributors or retailers.
C2C	Consumer to consumer, where consumers sell products directly to other consumers.
C2B	Consumer to business, where consumers sell products to business, such as freelance services.
Cross channel commerce	Strategic maximisation of customer relationships beyond the initial engagement channel.
m-Commerce	Mobile commerce, the use of wireless devices to conduct commercial transactions online.
Multi-channel commerce	An online purchase experience that involves multiple channels, such as social media, company website, user reviews, in-store, traditional media, and apps.
Omnichannel	Retailing strategy that delivers a seamless customer experience through all available shopping channels.
Payment gateway	eCommerce service that processes online payment for purchases through online stores.
Social commerce	Subset of ecommerce that involves social media and online media that supports social interaction, where user contributions assist in online trade of products.

8.3 TYPES OF ECOMMERCE

Electronic commerce, or ecommerce, is defined as the buying and selling of products and services, including funds and data, electronically. eCommerce can be divided into four main types, namely, business to consumer, business to business, consumer to consumer, and consumer to business.

8.3.1 Business to consumer (B2C)

The most common type of ecommerce is business to consumer (B2C), in which a business sells products or services directly to consumers over the internet. All retail sites are essentially B2C. The world's largest online retailer, amazon.com, is a prime example.
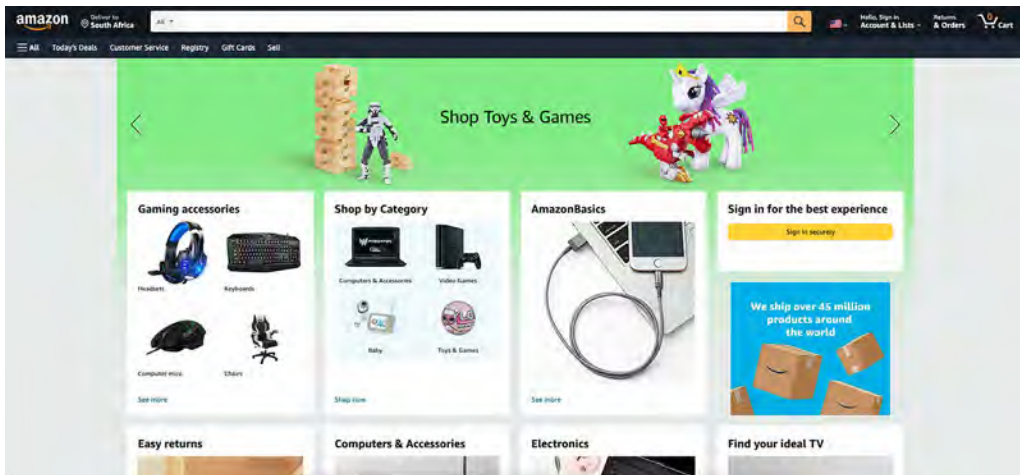
Figure 8.2 The Amazon homepage is an example of B2C ecommerce

The benefits of ecommerce include the ability for retailers to have a wide variety of products available without needing the physical retail space to hold and display items. The procurement and distribution processes are also streamlined as products are shipped directly to consumers, and not via distributors or retail outlets in between. The process has 'less overhead', and is more efficient in terms of time and money, reducing inventory management costs. Ultimately B2C is able to deliver products to customers at lower costs than in-store retail outlets.

8.3.2 Business to business (B2B)

Another type of ecommerce is business to business (B2B), which describes online transactions between businesses, such as between a manufacturer and a wholesaler or between a wholesaler and a retailer. It can also include business-related services, such as letting of commercial spaces, printing services, outsourced marketing, as well as hiring and selling of office equipment.

Like B2C, the same benefits of lowered inventory management costs and a more streamlined procurement and distribution process, make ecommerce an efficient and attractive model for companies selling to other businesses.

8.3.3 Consumer to consumer (C2C)

Consumer to consumer (C2C) ecommerce is where consumers sell products to other consumers. Generally, a C2C business provides the platform for various users to use it to interact with each other for mutual benefit. A recent large-scale C2C ecommerce example is Uber. The business simply provides a transactional platform where consumers offer other consumers a lifting service based on location and cost preference. eBay is another globally recognised C2C online business. Sellers can list their products on eBay, and interested buyers auction for listed products. Similar sites, such as Airbnb, Gumtree, and Craigslist are all C2C ecommerce platforms.

In C2C ecommerce, consumers either pay a fee to use the platform or the platform takes a percentage of all transactions processed through the site. If the platform is free to all consumers to buy and sell, then the site often generates its revenue through advertising.
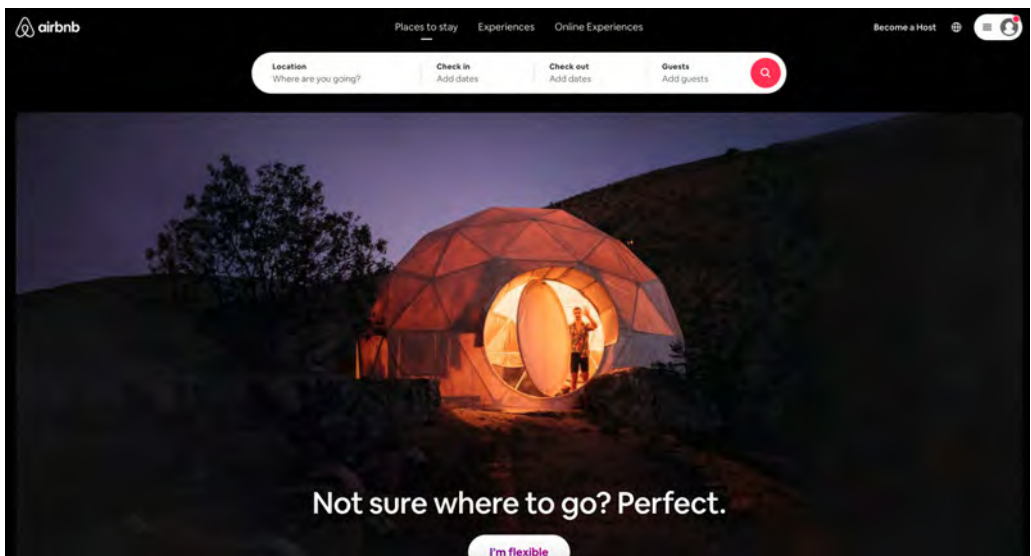
Figure 8.3 Airbnb is a platform that facilitates C2C services

8.3.4 Consumer to business (C2B)

Consumer to business (C2B) ecommerce involves consumers selling products or services to businesses; the business pays the consumer. Examples include guru.com, a freelancer hiring website, and websites that pay individuals for completing online surveys.

8.4 ECOMMERCE ON SPECIFIC CHANNELS

eCommerce refers to electronic business transactions across the entire internet. There are some specific channels on which ecommerce is gaining popularity, namely mobile and social commerce.
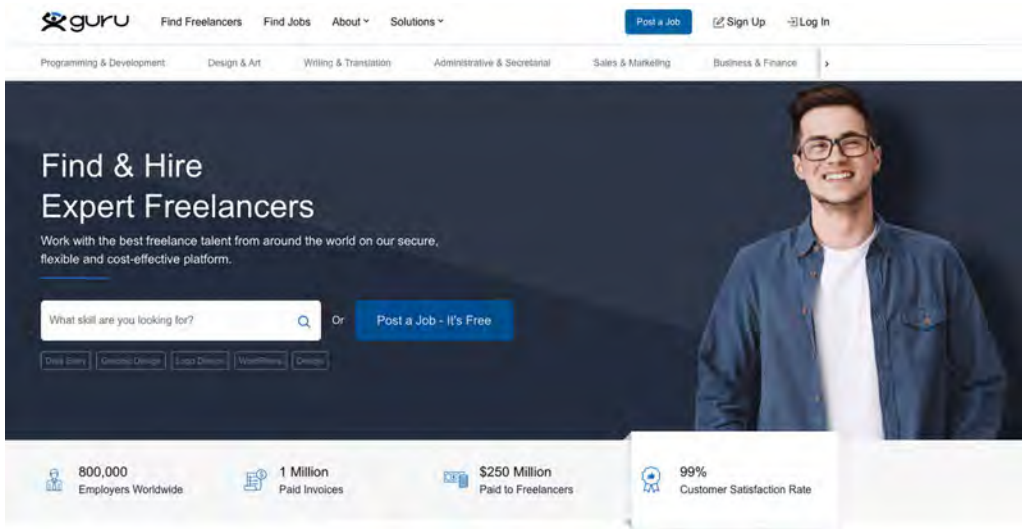
Figure 8.4 The guru.com homepage

With mobile becoming the channel of choice for accessing the web and with Facebook, along with other social media platforms, continuing to dominate the time users spend online, businesses need to ensure that they operate in these spaces if they want to continue to appeal to and retain their users.

In short, having ecommerce that operates across mobile and social is an online business necessity. Failure to move into these spaces means users may simply look for alternatives that facilitate ecommerce through these channels.

8.4.1 Mobile commerce (m-commerce)

Mobile commerce (m-commerce) is the use of wireless handheld devices such as cellular/ mobile phones to conduct commercial transactions online. According to Statista, in 2021, more than 70% of global ecommerce was generated via m-commerce. This trend is driven by mobile-first economies, where there are emerging ecommerce markets. The importance of m-commerce is undeniable and should be included in every business' ecommerce strategy.

Consumers use mobile for a host of transactions (e.g., mobile money transfers, electronic ticketing and boarding passes, digital content purchases and delivery, mobile banking, contactless payments and in-app payments, location-based services, mobile marketing, and loyalty cards).

A December 2021 survey by PwC asked consumers how often they have bought products, such as clothes, books, and electronics, in-store vs. using their smartphones. They discovered that 41% of respondents shop via mobile or smartphone daily or weekly, compared to 12% in 2016.
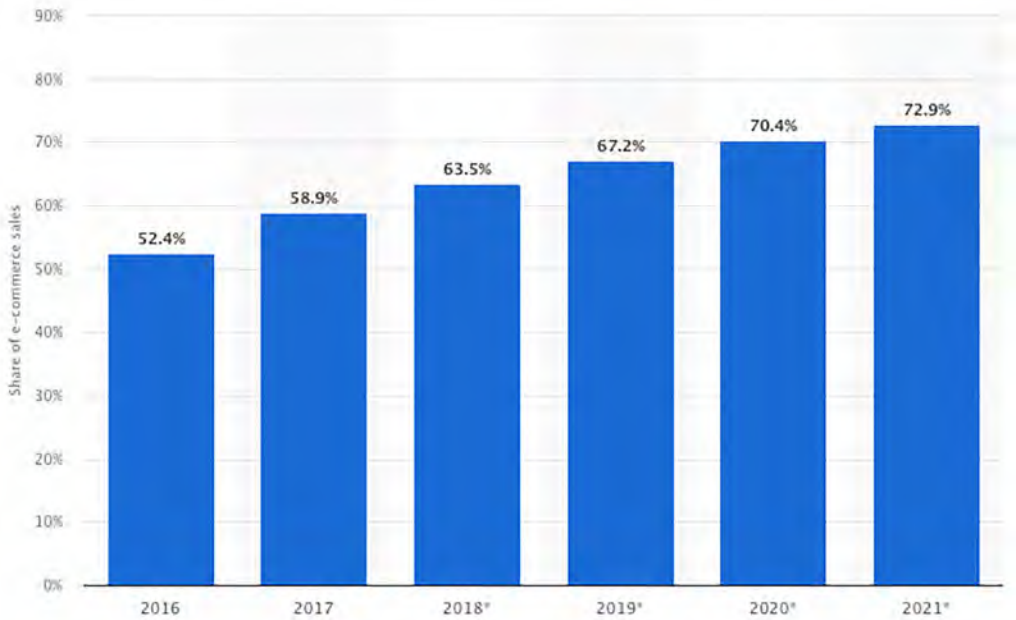
Figure 8.5 Global mobile retail commerce sales share 2016–2021
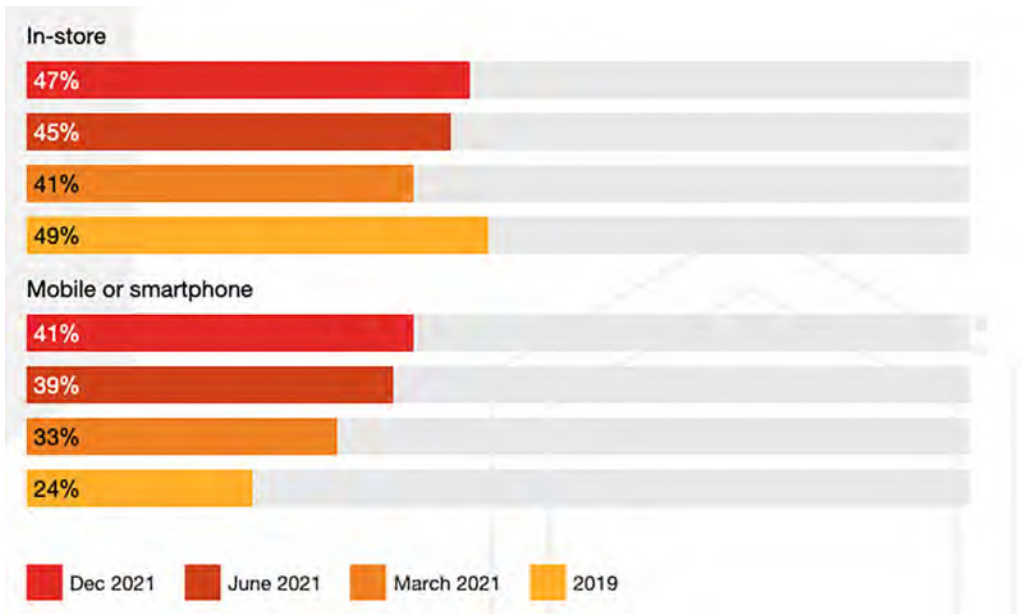
Figure 8.6 Results from a PwC survey show that 41% of respondents shop on their mobile or smartphones daily or weekly

Reasons for growth in m-commerce

M-commerce transactions continue to grow as a result of the following:

- The **number of global mobile users is steadily increasing** every year, resulting in an increased demand for mobile websites and applications.
- The **rapid adoption of ecommerce** means that evolving customers are looking for more options across more devices.
- **Improved technology** has given mobile devices advanced capabilities and faster internet access enabling m-commerce to be available on even the most affordable devices.
- **Broadband technology** and **lowering data costs** mean more consumers have access to m-commerce even on affordable devices and data plans.
- Mobile users are looking for **instant gratification** online; this includes their online shopping needs. An increase in m-commerce for fast food, fresh produce, and basic household items, such as toilet paper, nappies, bread, and eggs, have been driven by this need for customers to get what they need, when and where they want it.

Benefits of m-commerce

M-commerce has a range of benefits over traditional ecommerce. These include:

Access: Gaining access to the internet through mobile is easier and more affordable than desktop options. The falling costs of data and improved internet access on mobile mean more and more users have access to the internet via mobile than any other device.

Convenience: Mobile phones are always with us; being constantly connected enhances the benefits of anytime, anywhere use with no need to plug in to or log in to computers wherever they are situated. Mobile is an appropriate name as these devices are with us wherever we go, making it easy and convenient to transact online at any time convenient to the consumer.

Costs: Mobile devices are more affordable than computers and offer multiple uses reducing the need for an additional computer. Calls, messaging services, social media, and news content are just a few of the reasons consumers would prefer to use a single device, making mobile phones the obvious choice.

Ease of use: Mobile phones are relatively easy and simple to use, and there is no need for a particularly digitally skilled consumer. They allow consumers to make instant purchases with little technical skill.

Mobile payments: Security around online payments remains the biggest barrier to ecommerce. Mobile payments allow alternative options for transactions via mobile currencies, mobile wallets, and alternative mobile only payment methods. Such easy and secure payment options make mobile the preferred choice for many users.

Rich content: The advances in mobile processing power and cheaper data rates mean GIFs and videos can be easily used on mobile web and mobile applications (apps). Such rich media

allows brands to better demonstrate a product's key features, to share testimonials of happy consumers, and to showcase the use/look of the product or service.

Mobile web vs mobile applications for m-commerce

Google is the largest search engine used by mobile consumers globally, and thus access to m-commerce sites is mostly via Google search. Email marketing and social media are the next largest drivers to m-commerce platforms, also via mobile browsers. As a result, traffic and transactions on mobile browsers outperform traffic and transactions on apps.

> **NOTE**
> If you want to learn more about whether a mobile app or mobile website is better for your business go to Human Service Solutions at www.hswsolutions.com/services/mobile-web-development/mobile-website-vs-apps.

However, this does not mean that mobile apps are not important. Just because most traffic is through mobile browsers, doesn't mean that your business cannot operate mainly through the app. Mobile applications should be considered, and, if applicable to your business, used in conjunction with mobile websites to enhance consumers' overall shopping experience. If most of your mobile traffic is through apps, then you will need to consider using the app as your primary m-commerce platform.

8.4.2 Social commerce (s-commerce)

Social commerce is a subset of ecommerce that involves social media (or other online media that supports social interaction) and user contributions, to assist users with the online buying and selling of products and services. S-commerce uses social networks to facilitate ecommerce transactions – it brings ecommerce functionality directly into social media platforms. Since users are increasingly spending their online time in these social media

> **NOTE**
> Survey your current customers to find out which social channels they prefer, as well as which sites and what type of content they like best. By determining where your customers hang out online, you can narrow your marketing efforts to the right channel that will help you reach your target customers without blowing your budget (Sherman, 2022).

spaces, bringing ecommerce to where users are spending most of their time, makes good business sense.

When customers are satisfied with your business, social media makes it easy for them to share and recommend your brand. Because of this shareable nature, social media is a place where content goes viral. This is known as social influence. Social media channels play a very important role in driving conversions if you have happy customers. However, such channels can also cause brand degradation if a customer is unhappy. Companies with the worst ratings are often those who offer poor customer support.

Time spent social networking and messaging
Daily Average (Hours : Minutes)

Time spent on social networking   Social networking as a share of online time
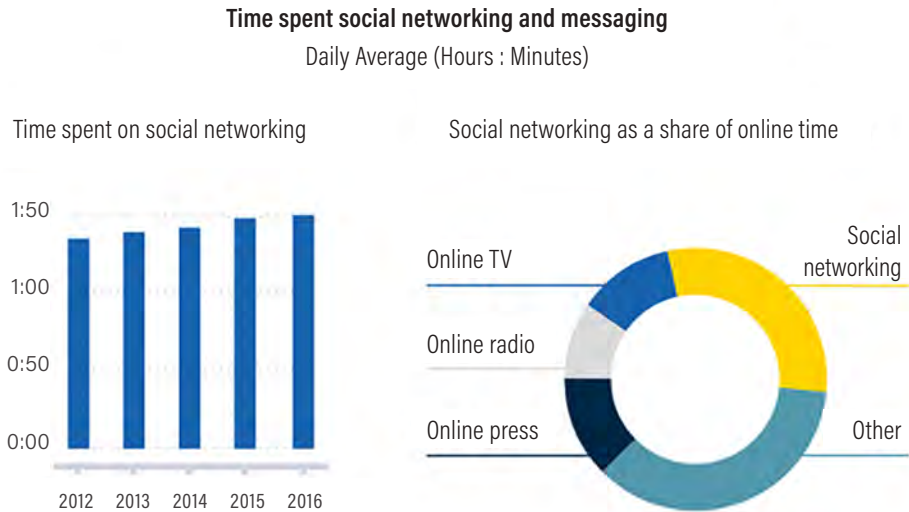
Figure 8.7 Social media captures 30% of online time

Social media enables conversations to spread at lightning speed. How you will harness these conversations to drive sales, needs to be considered as part of any ecommerce strategy. Enabling users to purchase the products and services that are being talked about and shared on social media, is the most effective way of using the platform to drive conversions. Various platforms now enable users to buy products directly and instantly through the platform. On Facebook, for instance, a 'Shop now' button is displayed, and on Pinterest users can buy highlighted items directly.

Benefits of s-commerce

Just like m-commerce, there are certain benefits that s-commerce has over traditional ecommerce. These include:

> **NOTE**
>
> To find out more about using Facebook for s-commerce go here: www.facebook.com/business/industries/retail-and-eCommerce and about Buyable Pins on Pinterest go here: revive.social/pinterest-buyable-pins/.

• **Audience growth:** The latest figures show that there are expected to be 3.96 billion social media users worldwide in 2022. This is 1.1 billion more than the number of users in 2017. The annual growth rate over this period is 6.7%. However, this growth is expected to plateau and is forecast at 3.7% from 2023 to 2025 (Oberlo, 2022). One of the most important considerations for any ecommerce business is how to reach and sell to its target customer audience. From these statistics it is safe to say that a large proportion of any brand's market is on social media.

• **Higher search engine ranking:** Using social media for s-commerce increases traffic to your website which will influence your ranking on search engine results. Sharing links to products and content on your website through social media is an excellent way to drive

traffic using social media users. It also allows your audience to engage with a product, by liking or sharing it, and to reach an even larger audience.

Figure 8.8 Buyable Pins on Pinterest

- **Authentic engagement and traffic:** The most significant benefit of using social media for s-commerce is the engagement and reach that businesses can get whenever they share content. By appearing in followers' updates or feeds on a regular basis, you're participating in a powerful branding opportunity. Users who have regular positive contact with a company are more likely to recommend that company.
- **Two-way communication:** Operating on social media encourages users to connect with a business through two-way communication. This allows customers to not only engage with your business on a commercial level, but also gives them the opportunity to use social media as an efficient customer service channel where it's possible to solve problems. Social media word-of-mouth (sharing/reposting) helps with audience building, as well as increased engagement and website traffic.
- **Customer loyalty:** S-commerce is not purely focused on selling but uses social platforms to help the business build relationships with potential and existing customers. Such relationships can deepen trust and loyalty between consumers and the brand. In turn, this creates happy, satisfied customers, likely to make repeat purchases, i.e. a loyal customer.

- **Analytics:** Social media platforms make it easy to track, measure, and evaluate conversions that happen through s-commerce. Facebook, Twitter, Instagram, Pinterest, and LinkedIn all offer built-in analytics tools for measuring traffic,

> **NOTE**
>
> Learn more about social media as a digital marketing tactic in **Chapter 14: Social media strategy** and **Chapter 17: Social media advertising.**

clickthrough, fans/followers, likes, sentiment, and actual conversions coming via the social platform. This is a huge benefit for monitoring your ROI.

8.5 MULTI-CHANNEL COMMERCE TO TOTAL RETAIL

In addition to being available on specific channels, ecommerce also forms part of other retail approaches. It is important to understand what these approaches are and where ecommerce fits into the broader strategy of your business.

Multi-channel commerce

When your business operates across multiple sales and media channels, you are considered to be engaging in multi-channel commerce. For instance, you might sell your products on your website, a mobile app, via a call centre, in stores, on Amazon and on eBay, all while communicating with customers via many types of devices and social media channels. You utilise a variety of multiple sales and marketing channels to sell your products to different types of users and, therefore, you're a multi-channel vendor.

MULTICHANNEL COMMUNICATIONS
CUSTOMERS
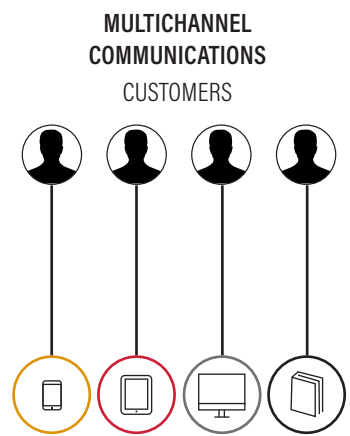
Figure 8.9 Multi-channel means operating across multiple channels to reach different customers

Cross-channel commerce

When your business encourages its customers to interact with your business on more than one channel, you are engaging in cross-channel commerce. Essentially cross-channel commerce

is the strategic maximisation of customer relationships via the introduction of new channels beyond the one that originally engaged the user.

A customer would have approached a brand via a specific channel to browse and initiate purchase, and cross-channel retailers would encourage that customer to then make use of other available shopping channels, such as the website, app, or social media platform, to engage further with the brand. Cross-channel retailers encourage interactions on their terms. Such interaction across channels increases the likeliness of additional conversions and future sales.
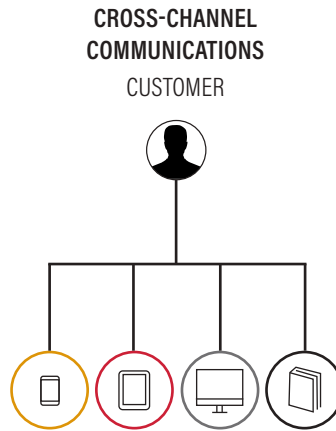
Figure 8.10 Cross-channel commerce is directing the same customer to engage with your business on more than one channel

Omnichannel commerce

An omnichannel commerce strategy can be defined as a retailing strategy that delivers a seamless customer experience through all available shopping channels. What distinguishes the omnichannel customer experience from the multi-channel customer experience is that with the latter there is true integration between channels on the back end, including customer data (single view of customer), inventory management, stock movement, supply-chain, fulfilment information, and customer relationship management.

> **NOTE**
> An interersting read on omnichannel shopping in the future, can be found here: www.mckinsey.com/business-functions/marketing-and-sales/our-insights/omnichannel-shopping-in-2030.

The customer's interaction with the brand is integrated across all channels. Customers can seamlessly migrate from channel to channel with no interruption or loss of data, and can pick up wherever in their customer journey they may be, irrespective of which channel they choose to engage the brand.

Customers are becoming increasingly digitally savvy and expect to be able to engage with the brand across a variety of channels, depending on what is most convenient to them. They expect

these interactions to be seamless, backed by an integrated system across all channels. In short, customers expect an omnichannel commerce experience and are frustrated by what they see as inferior brands that fail to provide this.

OMNICHANNEL
COMMUNICATIONS
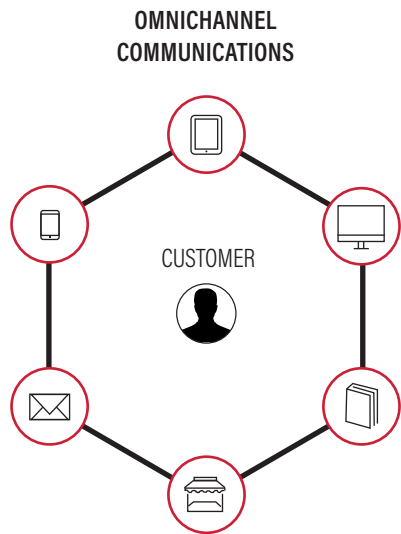
CUSTOMER

Figure 8.11 Omnichannel commerce means providing a seamless customer experience by integrating interaction across all available channels

| Single channel | Multi-channel | Omnichannel |
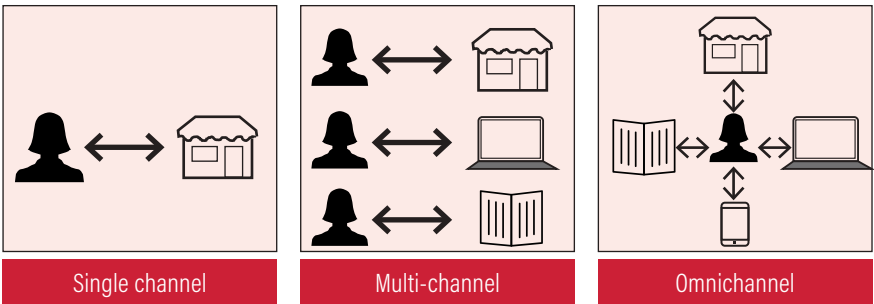
Figure 8.12 A diagrammatic comparison of omnichannel commerce vs. multi-channel and single channel commerce

Total retail

A seamless experience across all channels should arguably be a point of parity, rather than a differentiator. However, with thousands of brands competing for business, there is a need to improve omnichannel and offer an enhanced and personalised online shopping experience if you want to satisfy and retain customers. In 2014, PwC termed this approach of providing a seamless, enhanced, and personal retail experience as going 'Total retail' (PwC, 2014).

Total retail means two things:

1. A unified brand story across all channels that promises a consistently superior customer experience
2. An integrated back office operating model with agile and innovative technology.
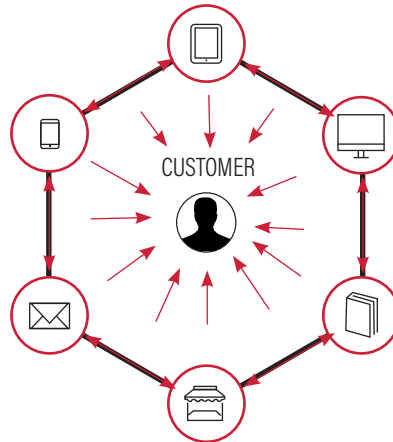
Figure 8.13 Total retail offers a customer-centred retail experience, delivered seamlessly across all channels

Total retail is a more customer centric approach than omnichannel. It still offers a seamless experience to the user across channels, but it places the individual customer's experience at the heart of all its business operations. The focus is on the customer, rather than the various channels that can be used to reach the customer.

According to PwC (2014) it is consumer expectations that are driving this new retail business model. Customers are quick to take their business elsewhere if they are not satisfied with their online shopping experience. Brands need to respond by doing what they can to make their ecommerce offering enjoyable, seamless, and as convenient as possible. To enable this, brands need to invest in customer-focused technologies that can track customers across the various channels and aim to achieve a single view of the customer. Moreover, brand trust is increasingly on par with other essential purchase considerations such as quality, value and convenience. Consumers and employees want brands to engage and advocate on issues that affect them. According to a survey, 80% of global respondents want brands to "solve society's problems". Companies that cannot reimagine their products will be left behind.

NOTE

Consumers expect transparency around order status and delivery, and some want near-instant fulfilment. This experience is fast becoming a key differentiator, one that's closely tied to perceptions of service and quality. For example, 42% of global respondents said fast and reliable delivery is among the top three most important attributes when shopping.
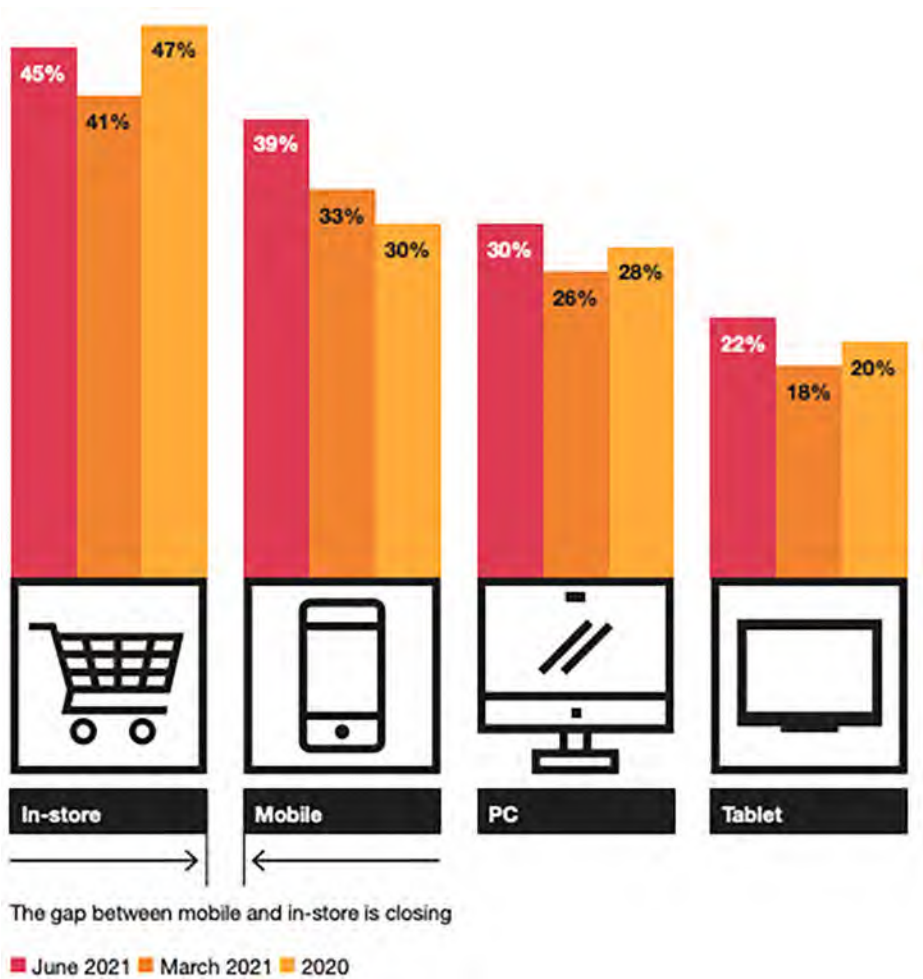
Figure 8.14 Transforming the channel experience to a total
retail experience with more focus on the consumer

8.6 SETTING UP AN ECOMMERCE SITE

When deciding to set up an ecommerce website there are five main considerations:

1. Which industry will you operate in and what products will you sell?
2. How will you build your website?
3. How will you physically ship your product and fulfil orders?
4. How will you drive traffic to your site?
5. What metrics will you measure to determine success, and which tools will you use?

Each of these considerations is important to having a successful ecommerce business. From choosing your product through to analysing your performance, decisions you make here will have a long-term impact on your business. So, carefully examine your options and make informed decisions to ensure future success.

8.6.1 Choosing an industry and product

To make your ecommerce business a success, you need to be selling a product that consumers will want and are prepared to buy online. You also need to ensure that you are making a reasonable margin on your products to sustain your business' longevity, and that you will be able to manage physically storing and delivering the product you choose to sell.

Here are some key factors to consider when choosing an industry and product:

- **Price:** If the product cost is too low, it will be challenging to reach a positive return on investment (ROI). If it's too high, there is a good chance that some customers will want to speak with someone or see, touch, and feel the product prior to making the purchase.
- **Margin:** Many products sold online have a gross margin around 30% to 35%. This can change drastically depending on the industry. For example, electronics and toys typically have smaller margins while clothing and apparel are often marked up by 150% to 200%.
- **Competition:** Generally speaking, it is easier to drive sales online when the product can't be bought in local stores or in a wide variety of online stores.
- **Shipping costs:** Larger products tend to have higher shipping costs which can negatively affect sales. Most customers not only want free shipping, they expect it. As a result, it can be difficult to sell a product with a hefty shipping fee. Many online retailers include the shipping cost in the cost of the product while raising the total price and offering 'free shipping'. However, these increases in price can decrease sales.
- **Passion:** Love the product or service you wish to sell. Starting and growing an ecommerce website typically comes with a series of obstacles and frustrations. Passion for your industry can be a great source of motivation to push through any challenges that may arise.

8.6.2 Setting up the website

There are five important steps to follow when setting up your ecommerce website:

Step 1: Choose your domain name

Step 2: Obtain a secure (SSL) certificate

Step 3: Choose the right hosting package

Step 4: Select an ecommerce platform

Step 5: Select your payment gateway.

> **NOTE**
>
> You can also check out this blogpost: How to set up an ecommerce website in 9 steps. Find it here: www.freshegg.co.uk/blog/web-development/getting-started-with-e-commerce (Colbran, 2020).

Let's look at each step in more detail:

Step 1: Choose your domain name

To get started, you will need a domain name for your website. Domain names can be purchased through hosting companies or domain registrars. When choosing a domain name, remember your target market; will you be targeting just your local market or an international one? If you are targeting the local market, you can register a local domain, such as .co.za or co.uk, but if you are targeting a global market then it would be preferable to go with an international domain like .com.

You can purchase domain names from companies like godaddy.com/en-uk or networksolutions.com.

Here are some tips for choosing a good domain name:

* **Make it easy to type:** Remember you want users to be able to find you easily. Slang, complicated names, or those with different spellings can make your site difficult to find. Choose words that are simple and easy to spell and type in your domain name.
* **Keep it short:** The longer and more complex your name, the higher the risk users misspelling or mistyping it. Keep it simple.
* **Use keywords:** Carefully think about words that describe your product and the keywords that users will type into search engines when looking for your brand or product. Using keywords will make your site rank higher on SERPs, which will drive traffic to your website.
* **Target your area:** If you are running a local business, try including your location in your domain name; this will make it easier for local users to find you and may rank you higher on search engines. For example, users looking for electricians in Chicago are more likely to find ChicagoElectrical.co.us than ElectricianForU.com.
* **Avoid numbers and hyphens:** Although using numbers or hyphens appear clever and make sense to you, they can confuse users who often type out the number or forget the hyphen. If you need to use characters, try to register the different variations to ensure users will still be driven to your site and not to a competitor.
* **Be memorable:** There are already millions of registered domain names. Users are inundated with regular ordinary names, so coming up with a domain that's catchy and memorable will definitely help to drive traffic to your site.
* **Research it:** Before you decide on a name, do your due diligence and research the name for any trademarks or copyrights. You also want to check that it is not too similar to any competitors. Failure to ignore trademarks and copyrights can result in costly legal battles and the potential need to rebrand later on.
* **Use an appropriate domain name extension:** When registering your domain, you will need to choose the extension. Extensions are the suffix at the end of your domain name, such as .com, .net, and .org. Local options, like .za or .uk, are also popular. The .com or .net options are the most popular. However, because these have been around so long, it is often problematic to get a unique and relevant name with that extension. Extensions have specific uses, so be sure that you choose the right one for your business.

Here are some of the most popular extensions and what they mean.

Table 8.2 Extensions and what they mean

.co	an abbreviation for company, commerce, and community
.info	informational sites
.net	technical, internet infrastructure sites
.org	non-commercial organisations and non-profits
.ac	academic institutions like universities and colleges
.biz	business or commercial use, like ecommerce sites
.me	blogs, resumes, or personal sites

- **Protect and build your brand:** When choosing your domain name, it is worth purchasing other domain extensions and spelling variations to prevent competitors or trolls registering other versions that will then direct traffic to these alternate sites. By owning all the domains, you ensure that customers are directed to your site, even if they use the wrong extension or misspell it.
- **Act fast:** Once you have decided on a name, you need to act quickly. Domain names sell fast, but they are affordable, so register your chosen domain name as soon as you have decided on it. If your desired name is already in use, most of the registrars will suggest alternate names to help you (Godaddy.com, 2015).

Step 2: Obtain a secure (SSL) certificate

If you are not using a pre-packaged ecommerce service, then alongside the domain name you will also need to obtain an SSL certificate to protect and secure your website content. SSL prevents malicious users from accessing your website to steal passwords, credit card information, and sensitive data. There are many providers of SSL certificates, such as Thawte or Symantec.

A list of SSL certificate reviews can be found on the following link: g2.com/products/ssl-com/reviews.

Step 3: Choose the right hosting package

All websites have to be hosted on a server somewhere. It is important to choose the right hosting package regarding website speed, uptime, and cloud hosting.

- **Website speed:** Hosting your website in the same country that you are selling to can have an impact on how quickly the website loads. If you are selling to a global market, then consider the use of a content delivery network (CDN) to help localise your site to different

target countries. Google has hinted that site speed is a ranking factor in its algorithms, so there are SEO benefits to having a good host, as well as the obvious user benefits.

* **Uptime and performance:** The reliability of the host to keep the website up and running is vital. At certain points during the year, such as peak-trading periods, the demand on your website will increase significantly. It's important to understand how the extra traffic will increase the load on your web server and the impact that can have on the site's performance. Too much traffic may even cause the server to trip over and crash, taking your site offline.

* **Cloud hosting:** Provided via multiple connected servers, a network cloud, these hosting services are seen as preferable to a single or virtual server because of their:

  * **Reliability and accessibility:** The content is more easily accessible, and there is less chance of server failure.

  * **Stability and security:** The servers will interact to sustain the site, offering more stability and more security in terms of not losing any data.

  * **Seamless scalability:** With cloud hosting you are not limited by the size and capacity of your particular physical server. The sky's the limit, unlike physical servers where you will need to expand or move to a larger server once you maximise that specific server's capacity.

  * **Cost efficiency:** The cloud removes a lot of the costs of maintaining physical servers.

Ensure that when choosing your host server, you consider user needs as well as back-end applications that need to operate in the background to facilitate orders and other processes. Think about your business objectives and if the hosting service you are opting for will be able to meet and facilitate your objectives.

Step 4: Select an ecommerce platform

When setting up your site, you need to use an ecommerce platform to assist you in building and hosting a digital storefront from which to actually sell your products and services. An ecommerce platform is the series of software technologies that enable this building and selling of products.

There is a vast range of ecommerce platforms that you can use. These various options can be classified under four main types of platforms:

Software as a service (SaaS) storefronts	Third-party providers host applications and make these available to customers online. Examples include Shopify.com and BigCommerce.com.
Open source	Open-source platforms provide a more affordable option for online businesses, and offer more control. However, you need to manage the hosting and some expertise is needed. Popular examples include Magento, WooCommerce and X Cart.

Licensed and hosted by the retailer	The provider will manage the site, and offer reliable support. However, site builds are often tied to the specific provider, and moving your site requires a complete rebuild. Large companies can also stagnate and not keep up to date, so ensure the provider you opt for is dedicated to development. Some popular examples include Oracle Commerce, IBM Websphere, and the paid version of Magento.
Platform as a service (PaaS)	PaaS is usually used for B2B where businesses are looking to link their ecommerce to other systems that their customers already have, such as SAP or Ariba. Such integration of systems allows clients to link their purchasing systems directly to their online sales processes, enabling automated purchase orders and stock management. PaaS is ideal for large corporations with complex procurement and distribution systems. Azure.microsoft.com, and Salesforce.com are all examples of PaaS ecommerce platforms.

Step 5: Select your payment gateway

A payment gateway is a service that processes credit card payments for online and brick-and-mortar stores. The gateway transfers key information between ecommerce sites and the bank and authorises such payments. There are three steps the payment gateway performs to finalise the transaction:

NOTE Read here about how more and more ecommerce store owners are turning to open source ecommerce platforms. www.ecommerceceo.com/open-source-ecommerce.

1. Encryption

The data to be sent is encrypted by the web browser. This transaction data is then sent by the gateway to the payment processor that the vendor's acquiring bank uses.

NOTE For a more comprehensive discussion about the ecommerce options available and how to choose the right one for you, read the following: larryludwig.com/best-ecommerce-platform/.

2. Authorisation request

The bank's payment processor sends the transaction data to the relevant credit card association. The bank that issued the credit card will view the request, and either approve or deny the transaction.

3. Filling the order

Once the processor has received authorisation, it forwards this to the payment gateway. The payment gateway then sends it on to the website to proceed with processing payment

if approved, or to deny the sale if denied. The website interprets the data and creates the appropriate response for the user. If approved, the merchant will proceed with filling the order.

This process takes only a few seconds, and is almost instant for the user. Gateways can also be used to prevent fraud and many have inbuilt fraud detection tools, such as delivery address verification, computer fingerprint technology, and geolocation, among others (BigCommerce, n.d).

If you're concerned about online fraud, see this helpful article by Chargebee on types of online fraud and how you can protect your site: chargebee.com/blog/protect-startup-online-fraud/.

When considering payment gateways for your ecommerce site, you have two main options: onsite or offsite gateway.

An **onsite payment gateway** (also known as a non-hosted payment gateway) means the gateway is integrated into your site, and users do not need to leave your site to complete their transaction. Iveri and Stripe are examples. Note that to receive online payments, you will need an SSL certificate and a merchant account.

An **offsite payment gateway** means the potential buyer is transferred over to the payment gateway's website. The user completes the payment and then is returned to the online store. PayFast and PayGate are examples. It is important to note that sending users away from your site can impact whether customers

> **NOTE**
> To fully decide which payment gateway is right for you, visit GoCardless's guide on the 10 questions to find the right one for you: gocardless.com/guides/posts/payment-gateways/.

complete their payment, especially if the process is slowed down by the redirection, and/or the user any security concerns about the redirection (GoCardless.com, n.d.).

8.6.3 Shipping fulfilment

Fulfilment is a big part of running a successful ecommerce store and can have a huge impact on your customer experience. The fulfilment process starts when the order is placed and ends when the customer receives the product successfully. There are six stages to the fulfilment process:

1. **Inventory management:** Ensure your stock-level information is accurate and up-to-date. Accurately forecast customer demands to manage your inventory stock-levels and plan order appropriately.

> **NOTE**
> Shopify has a great blog post on eight inventory management techniques to help your business: www.shopify.com/retail/inventory-management.

2. **Warehouse management:** Ideally integrate your warehouse and stock management with a warehouse management system. This is a software application that supports the day-to-day operations in a warehouse. It will monitor stock arrivals, warehouse-store transfers, and departure points. The correct and precise allocation of stock within the warehouse is critical for fast, and accurate fulfilment. Some

popular examples of warehouse management software include [EZOfficeInventory](#) and [Zoho Inventory](#).

3. **Order management:** Ensure you know the order status throughout the fulfilment process and integrate notifications of delays/disruptions in the order management process.

4. **Destination:** To offer customers a successful, fast, and accurate delivery, it is important to understand the destination:

   - **Home delivery:** Delivery to an individual's house, apartment, place of work
   - **In-store collection** (also known as 'click and collect'): Online orders are delivered to a physical store, in the customer's chosen area, for later collection by the customer
   - **Inter-branch transfers:** Stock is transferred from one store to another and purchased via an online order or point-of-sale.

5. **Returns:** To ensure a seamless customer experience, a returns policy should be available and well communicated to potential customers. Any returns process should be easy and convenient for online shoppers.

6. **Order tracking:** All orders should be tracked and their progress frequently communicated to the customer. Communication should include the status, expected delivery date, and time of the order. Any changes to estimated delivery dates or times need to be communicated as soon as possible. As mentioned before, customers expect a free, fast and seamless delivery which entails more than just pick, pack, and ship.

8.6.4 Driving traffic to your site

To make sales, you need users to visit your online store. Driving traffic to your store is a prominent marketing and advertising specific objective. Many of the techniques discussed in the section below will be covered in greater detail in the rest of the course.

You can drive traffic to your store by using the following techniques:

Content marketing strategy: Highly targeted and quality content can result in positive social influence and ultimately drive traffic to your website. It is important to create meaningful content with your customer as the main subject in your storyline. Positive customer feedback can influence other customers and drive them to your online store.

> **NOTE**
> Read more about content in **Chapter 10: Planning your content**.

Product videos: Include videos/360-degree views of your product. Visually experiencing the product closes the gap between the 'touch and feel' benefits of in-store shopping and the online experience. Customers enjoy and appreciate seeing the detail of the product and are then inspired to purchase it.

> **NOTE**
> Read more about using video in **Chapter 12: Content creation: Video**.

Alias domains: To grow the traffic to your site, it is necessary to capture all potential customers trying to reach you. Whether they have misspelled the brand name or entered the wrong/similar name directly into a search engine rather than the address bar; it is important that they still reach the destination and that this does not become lost traffic.

There are two strategies to owning alias domains:

1. Purchase any misspelled domain names for your brand. For instance, if you type amazonn. com, your browser will automatically take you to amazon.com.
2. Own the alias search terms for your brand.

Social media campaigns: There are so many channels to choose from when opting for social media, but it is important to use the right social media platform for the right type of advertising:

> **NOTE**
>
> Read more about advertising on social media in **Chapter 17: Social media advertising.**

- Use images or videos to demonstrate the benefits and details of your product. Good platforms for this include Facebook display ads, Instagram, Pinterest, and Snapchat.
- If your product or service targets a professional customer, use professional networks, such as LinkedIn or Twitter, to drive thought leadership or content marketing strategy.
- For products or services that rely heavily on social influence, understand the audience, then re-target to the happy customer's network.

Customer reviews: Research indicates that customers like to read reviews of a product or service prior to making a purchase. Encourage customers to leave reviews about their experience or the product itself.

Customer reviews also provide meaningful feedback to the retailer indicating the response to new and changing product lines, which products to promote and potentially, which product to remove from the offering.

Product merchandising and SEO: All elements of online merchandising affect your search optimisation and directly influence the sale. Product names must be short, searchable, and descriptive. Product images must be inspiring, detailed, and include specifics. Product descriptions need to be engaging and original. Text descriptions with well-chosen keywords will be picked up by search engines. Unique descriptions will prevent you from being filtered out as spam by search engines.

Landing pages: Direct paid media, such as search, email marketing and display media, should lead users directly to the relevant product pages and not to the homepage. These pages are called landing pages. Matching product or category landing pages to users' intent will improve drop-off rates and increase conversion rates.

Search: Besides optimising the site for search engines and buying paid search media (Search Engine Marketing – SEM), it is critical to include site wide search on your page. To ensure the user finds the product, service, or information that they are looking for, include an easy-to-find

and easy-to-use search function. Users expect this to be at the very top or top right of your site, across most pages.

Site speed and performance: To avoid page-abandonment, ensure that the site loads quickly with the most important elements loading first. Fast engagement time and performance are essential to keeping the user engaged, and if not considered during development and monitored on an ongoing basis, could result in a poor user experience or lost customers.

Registration and checkout: The registration process needs to be quick and relatively painless for the user. It should only request essential information. Sites that ask for too much or unnecessarily personal information will lose traffic and result in increased drop-off rates. Checkout needs to be slick, simple, secure, and informative. Checkout needs to be supported with transactional emails that confirm the user's order ID, order details (product and price paid), as well as delivery and tracking information.

8.6.5 eCommerce analytics

As with all digital interaction, ecommerce activities can be easily tracked. There are certain key pieces of information that you need to be aware of and should be tracking. These include:

*   **Supply-chain management:** Information about the products and the process from the warehouse through to delivery to the customer.
*   **Product analytics:** Details around how many times a product is viewed, positive or negative reviews, social sharing, loading of detailed information on a product, and actual conversion rates.
*   **Online marketing analytics:** Success, or conversion rates, of your marketing initiatives that enables optimisation of spend for paid campaigns and strategy optimisations for earned and owned campaigns.
*   **Tracking the ecommerce funnel:** Can customers find the products they are looking for? Can customers add products to cart and check out successfully? Analysing this data highlights site speed and performance as well as detailed information about traffic sources, high-traffic times of the day, and related conversion rates.

The most popular ecommerce analytics tool is Google Analytics: analytics.google.com. A powerful and detailed analytics tool, the platform offers many benefits, including:

*   Provides a vast amount of data from conversion rates to revenue by product
*   Offers insight into customer behaviour and analyses cart-abandonment
*   Integrates digital marketing initiatives, including remarketing
*   Offers detailed metrics to understand the total economic value of the online store in relation to the overall business

> **NOTE**
> Try out Google Analytics and learn about this powerful analytics platform by using Google's demo account. Google also offers some great guidance: support.google.com/analytics/ answer/6367342?hl=en.

- Has promotion tracking, tracking internal e.g., vouchers, and external promotional efforts e.g., affiliate marketing
- Tracks revenue by currency, including online refunds for accuracy in revenue and reporting.

8.7 TOOLS OF THE TRADE

There are a variety of tools relevant for working with ecommerce. We have discussed many tools through the course of this chapter and mentioned Google Analytics as an essential analytics tool in the last section. But there are many other paid and free online tools that you could opt for.

> **NOTE**
>
> For more on the tools that are available in 2022, read this article: influencermarketinghub.com/ecommerce-marketing-tools/.

Table 8.3 Tools of the trade

Storenvy	storenvy.com/	Free tool for building an online store. It's a marketplace platform, but does enable you to build your own store, with your own design and branding
Shopify	shopify.com/	Possibly the most preferred tool for new online stores. Affordable with many features for your store
Gumroad	gumroad.com/	Considered one of the simplest ways to start an online store
WooCommerce	woocommerce.com/	Platform that enables you to add a store to your WordPress site or blog, providing an impressive store and business
PayPal	paypal.com/	One of the largest online payment gateways, but it can be complicated and confusing to implement
Stripe	stripe.com/	Popular payment gateway that you can integrate into your store. It works with Shopify, WooCommerce, and other popular platforms
Amazon payments	pay.amazon.com/us/	One of the simpler payment gateways available, run by Amazon

8.8 ADVANTAGES AND CHALLENGES

Throughout this chapter we have discussed some of the benefits of using ecommerce. In short, with online retail already a trillion-dollar industry and growing each year, to stay in business, businesses need to be operating online. It is no longer simply nice to have, but is an essential part of business in the 21st century.

The beauty of ecommerce is that it is easily tracked and monitored. Analytics tools provide incredible data that can be monitored in real time, and changes can be implemented quickly. It makes this space dynamic but also incredibly competitive. Online shoppers have more variety and options than any shopper has ever had before, and catching their attention is more and more difficult. But, once you have caught potential customers' attention, your ecommerce platform has to be good enough to keep their attention and guide them through to completing their conversion.

Besides stiff competition, and being an incredibly dynamic and fast changing environment, ecommerce has other challenges. There are many factors operated by other service providers, or that are simply beyond your control. Issues, such as crashing servers, slow data, errors on external payment gateways, or faulty links in display ads, all impact negatively on your brand, even though you have little to no control over such issues. If a user is trying to access your online store, and these issues negatively impact their experience, it is your store that they associate this experience with.

Choosing appropriate service providers who can meet the needs and future demands of your site is key, so take time to carefully consider and review your options when setting up your site.

8.9 CASE STUDY: CHIPOTLE

Chipotle is an American chain of fast casual restaurants. To keep up with the increasing trend of online orders during the Covid-19 pandemic, Chipotle had to rethink their delivery strategy.

One-line summary

When Chipotle rolled out a mobile app, it did not properly consider its impact on the stores; they started to examine how to leverage the app to add value to customers, rather than contributing to their frustrations.

The problem

Chipotle was growing at a rate of 200 restaurants per year in the USA, but the introduction of a mobile app was resulting in long waits and queues for people using the app, as well as customers wanting to order in-store. The company's CEO, Brian Niccol, said:

> We also solved another problem that had been hurting our reputation: Those waiting in line could see when employees stopped serving them to put together an online order, and it annoyed them.

Chipotle's marketing budget was $150 million per year, but the ROI did not seem worth the expense.

The solution

The executive team realised that the mobile app did not add value for customers if they did not align their in-store experience with the ease of ordering. For this reason, the stores were reconfigured in two important ways:

- Grab-and-go shelving next to the cash registers, where customers can easily grab their food. This was instituted along with customer education about how to go about finding their food.
- The creation of a second 'kitchen' with separate staff at the back-of-house, which focused exclusively on online orders.

When the pandemic hit, Chipotle also extended their food delivery service to include food delivery apps, such as Uber Eats and Grub Hub, which allowed them to reach even more customers.

Chipotle's marketing strategy was also refined for efficiency and 'bang for buck'. Moving away from local 'buy-one-get-one-free' deals, which, according to Niccol, were 'defensive, expensive, [and] promotion-focused', Chipotle shifted their marketing to social media and marketing.

The results

In 2020, Chipotle's digital sales grew by 174.1% to $2.8 billion. This represented almost half of all the brand's sales in that year. This was driven by their expanded partnerships with food delivery service companies, as well as the use of the mobile app to order ahead and collect at the drive-through.

Facts & Financials: Chipotle

Founded: 1993
Headquarters: Newport Beach, California
No. of employees: 97,000
No. of restaurants: 2,800

Revenue   Operating income
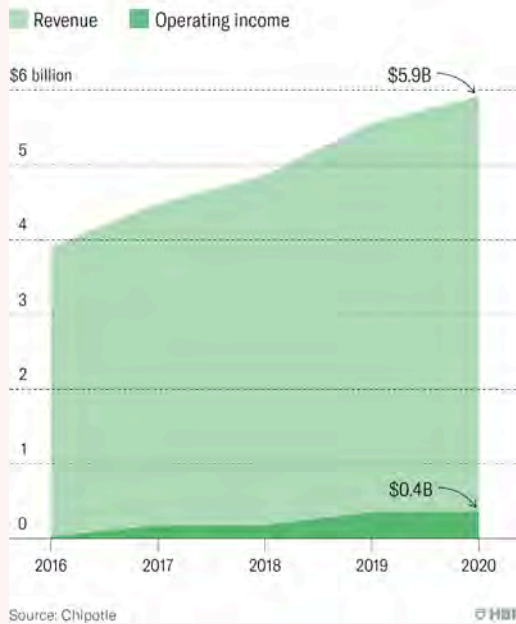
Figure 8.15 How expanded partnerships and the use of a mobile app grew digital sales

8.10 CASE STUDY QUESTIONS

1. Why was it important for Chipotle to spend a lot of time and money on the fulfilment process?
2. To what extent did external forces play in the company's digital sales growth? Explain your answer.
3. Would a website have been effective as a sales channel? Explain why or why not.
4. How could Chipotle incorporate analytics into their app to assess the app's successes and failures?

8.11 THE BIGGER PICTURE

eCommerce is an important part of operating a business in the 21st century. Not having an online store can be detrimental to your business. Your ecommerce store needs to operate alongside your website and online presence.

The aim of almost all of your digital marketing tactics is to direct potential shoppers to your online store to ultimately convert. Your online store needs to be consistent with your other online messages and should provide a seamless experience for the user. The overall user experience with your ecommerce platform needs to be sound, simple, and efficient.

It is also important to note that if your ecommerce platform falls short, and does not provide a pleasant user experience, it means all your other marketing efforts have been in vain. Directing traffic to your online store is not the ultimate goal; the ultimate goal is conversion. A sloppy online store can put potential shoppers off your brand, not just in this instance and online, but as a whole.

8.12 SUMMARY

In this chapter, you have learnt about the different types of ecommerce. You have also learnt the steps and been referred to the tools for setting up a site to do business online. Key considerations and questions to ask when planning your ecommerce strategy were provided, as well as the importance of thinking about the possible future demands of your business.

You now have a sound understanding of the processes involved behind the scenes of ecommerce, and how ecommerce fits into your digital marketing strategy. Lastly, you were shown how to go about tracking and monitoring your ecommerce activities and why such analytics is important.

Although designing and creating your own complex and commercial ecommerce store is beyond the scope of this book, we hope you now have insight into its development and know what to consider when commissioning and using ecommerce platforms.

8.13 CHAPTER QUESTIONS

1. What are the steps involved in setting up an ecommerce platform?
2. Why is analytics so important, and which metrics in particular would be of interest to online retailers?
3. List some of the ways that you can drive traffic to your ecommerce site.
4. Explain how important ecommerce is to any digital marketing campaign.

8.14 FURTHER READING

Here are some blogs to read up more on ecommerce:

digitalcommerce360.com/internet-retailer – Internet Retailer

ecommercetrainingacademy.com/blog/ – ECommerce Training Academy blog

elasticpath.com/blog – Get Elastic

influencermarketinghub.com/social-commerce-stats/ – 30 social commerce stats

shopify.com/blog/ecommerce-business-blueprint – Shopify blog

8.15 REFERENCES

Ayers, T., 2015. 7 Inspiring Examples of Omni-Channel User Experiences. [Online]
Available at: www.linkedin.com/pulse/7-inspiring-examples-omni-channel-user-experiences-tyler-ayers/
[Accessed 30 May 2022]

Chaffey, D., 2022. Global Social Media Statistics Research Summary 2022. [Online]
Available at: www.smartinsights.com/social-media-marketing/social-media-strategy/new-global-social-media-research/
[Accessed 12 May 2022]

Colbran, L., 2020. How to set up an ecommerce website in 9 steps. [Online]
Available at: www.freshegg.co.uk/blog/web-development/getting-started-with-e-commerce
[Accessed 30 May 2020]

GoCardless.com, 2021. Payment Gateways: 10 questions to fine the right one for you. [Online]
Available at: gocardless.com/guides/posts/payment-gateways/
[Accessed 5 June 2017]

Moore, K., 2022. Payment Gateways: Keeping Your Ecommerce Transactions Safe + Customers Happy (2022). [Online]
Available at: www.bigcommerce.com/ecommerce-answers/what-is-a-payment-gateway-and-what-is-its-role-in-ecommerce/
[Accessed 12 May 2022]

Niccol, B., 2021. The CEO of Chipotle on Charting a Culinary and Digital Turnaround. [Online]
Available at: hbr.org/2021/11/the-ceo-of-chipotle-on-charting-a-culinary-and-digital-turnaround
[Accessed 12 May 2022]

Oberlo, 2022. How many people use social media in 2022? [Online]
Available at: www.oberlo.co.za/statistics/how-many-people-use-social-media#:~:text=The%20latest%20figures%20show%20that,jump%20in%20just%20six%20years
[Accessed 30 May 2022]

Perez, S., 2020. COVID-19 pandemic accelerated shift to e-commerce by 5 years, new report says. [Online]
Available at: www.weforum.org/agenda/2020/08/covid19-pandemic-social-shift-ecommerce-report
[Accessed 12 MaY 2022]

PwC, 2014. Achieving Total Retail: Consumer expectations driving the next retail business model. [Online]
Available at: www.pwc.com/gx/en/retail-consumer/retail-consumer-publications/global-multi-channel-consumer-survey/assets/pdf/achieving-total-retail.pdf
[Accessed 12 May 2022]

PwC, 2017. Total Retail 2017: 10 Retailer investments for an uncertain future. [Online]
Available at: www.pwc.com/gx/en/industries/assets/total-retail-2017.pdf
[Accessed 12 May 2022]

Rowland, A., 2022. How to choose a domain name: 10 expert tips. [Online]
Available at: uk.godaddy.com/blog/10-tips-choosing-perfect-domain-name/
[Accessed 12 May 2022]

Schreiber, T., 2015. How One Couple is Making $600,000 Per Year Selling Digital Products. [Online]
Available at: www.shopify.com/blog/17587420-how-one-couple-is-making-600-000-per-year-selling-digital-products
[Accessed: 12 May 2022]

Smart Insights, 2017. Why 2017 will be the year mobile eCommerce over takes desktop. [Online]
Available at: www.smartinsights.com/mobile-marketing/mobile-commerce/2017-will-year-mobile-ecommerce-takes-desktop/
[Accessed 12 May 2022]

www.statista.com/statistics/379046/worldwide-retail-ecommerce-sales/
[Accessed 12 May 2022]

8.16 FIGURE ACKNOWLEDGEMENTS

Figure 8.1: www.statista.com/statistics/379046/worldwide-retail-e-commerce-sales/, 2022

Figure 8.2: Screenshot, Amazon.com www.amazon.com/, 2022

Figure 8.3: Screenshot, airbnb.com

Figure 8.4: Screenshot, www.guru.com, 2022

Figure 8.5 and Figure 8.6: www.pwc.com/gx/en/retail-consumer/retail-consumer-publications/global-multi-channel-consumer-survey/assets/pdf/achieving-total-retail.pdf

Figure 8.7: Global Web index, 2016 blog.globalwebindex.net/chart-of-the-day/social-media-captures-30-of-online-time

Figure 8.8: Demandware, 2017

Figure 8.10 and Figure 8.11: Adapted from Liquid-state, 2016

Figure 8.14: www.pwc.com/gx/en/consumer-markets/consumer-insights-survey/2021/gcis-june-2021.pdf

Figure 8.15: hbr.org/2021/11/the-ceo-of-chipotle-on-charting-a-culinary-and-digital-turnaround

Chipotle logo: chipotle.com
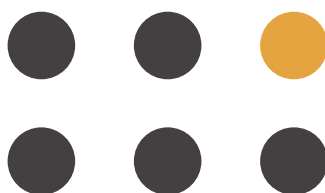
CREATING

INTRODUCTION TO CREATING

Effective marketing is made up of engaging content. This is true for digital marketing, too. However, it is not as simple as typing up a description of your product and hoping for the best. Rather, an effective marketing strategy is needed to ensure that your content – whether it be information, inspiration, or entertainment – is hitting the mark and is aligned to your customers' values, desires, and needs.

 In **Creating** you will see that crafting appropriate content, based on your consumers' receptiveness, needs to deliver to your brand's promise. The first place to start is to consider your brand essence – who are you, and what are you trying to say? Once you've worked that out, you need to think about the resources available to you to develop and create content.

In **Chapter 9: Content marketing strategy**, you will focus on the role that content marketing strategy plays in the marketing strategy as a whole, and the steps you need to take to put this in action. Bad content is as effective as no content; in fact, bad content is probably worse than no content. Be mindful of this before hitting Publish on a web post or video upload.

Closely linked to the creating process is the importance of content-related research. In **Chapter 10: Planning your content** the focus is on reaching your target audience, from creating a content planner to the execution where you customers click on the CTA button. You will see how publishing in the right channel in the right format is important. For example, if you're targeting young, wealthy executives, email will probably be a waste of your time, as they generally don't have the time or headspace to engage with marketing emails.

Chapter 11: Content creation: Copy focuses on online or digital writing, where customer personas determine your style and format of your ad copy. You will see that targeting early adopters requires a different language, but that all copy needs to be strong, clear, and easily readable.

In **Chapter 12: Content creation: Video** the differences between copy and video content, both requiring different skills sets and considerations to be truly effective, are discussed.

In **Chapter 13: Social media** you will see that this landscape facilitates the conversation between brand and customer, where the connectedness can either be useful or negative. You constantly need to monitor your brand advocates and influencers since they are powerful allies in building your brand reputation online.

By the end of this section, you will understand that all your marketing efforts should feed into building your online brand community. You will have a better understanding of what goes into creating a compelling content marketing strategy, and how to leverage this for maximum engagement with your customers.

09

CONTENT MARKETING STRATEGY

In this chapter, you will learn:

- How to understand the role of content marketing strategy within your marketing plan
- How to familiarise yourself with the steps involved in developing your content marketing strategy
- How to recognise some models for understanding how types of content are absorbed or experienced by your target audience.

9.1 INTRODUCTION

While the phrase 'content is king' has been referenced for some time, it is only in the last decade that content marketing strategy has been solidified into a discipline of its own. Defining content marketing strategy can be tricky, however, with some practitioners focusing more on the role it plays in information architecture, and others believing that it should be considered on a campaign-by-campaign basis.

This chapter looks at content marketing strategy from a holistic perspective, as a process that includes an understanding of all the content your brand is creating, those for whom it is intended, and for what purpose. Content marketing is important for positioning your brand in the minds of consumers. As a content marketer, you need to understand the brand and consumer context and be able to craft appropriate content based on user receptiveness and channel appropriateness. You also need to select the best route to customer in terms of tactics and understand how content marketing fits and contributes to your overall marketing strategy. Ultimately, the design and the content should motivate the user enough to share the content with others.

9.2 KEY TERMS AND CONCEPTS

Table 9.1

Term	Description
Algorithm	Mathematical, computational, or statistical method pre-determined to take a number of variables into account and output a single, quantifiable result that is a function of all the variables. A good example of a commonly used algorithm is the one used by Google to determine which pages rank more highly on SERPs.
Content audit	An examination and evaluation of the existing content a brand publishes.
Editor	A person who determines the ultimate content of copy, traditionally in the newspaper, magazine, or publishing industry context.
Information architecture	The way data and content are organised, structured, and labelled to support usability.
Persona	Character created to define a group of users in order to speak to them as though they were a unique user.
Usability	A measure of how easy a system is to use.

9.3 DEFINING CONTENT MARKETING

Content marketing is an umbrella term that focuses on matching content (information, inspiration, or entertainment) to your customer needs at whichever stage they are in the buying cycle or customer journey. Unlike TV, where the advertiser pushes messages to a captive audience, the focus is on engaging content, which means that marketers must think like publishers (attracting an audience) rather than seeing themselves as advertisers (buying an audience) of a product. The internet has, in many respects, cut out the middleman. Consumers and brands can now connect directly through a number of easily accessible online platforms.

Defining this form of marketing, the Content Marketing Institute offers the following definition:

> *Content marketing is a strategic marketing approach focused on creating and distributing valuable, relevant, and consistent content to attract and retain a clearly-defined audience — and, ultimately, to drive profitable customer action* (Content Marketing Institute, 2017).

This description applies to all the spaces you share content: both traditional and digital. This includes printed magazines, booklets, and promotional material, as well as your social media space, website, campaigns, competitions, and company blog. The way that information is shared is also important.

Kristina Halvorson (2010) suggests this model for approaching the different areas of content marketing strategy:

Figure 9.1 A model explaining content strategy

When creating content it is necessary to ask and answer the following questions:

Content components

- **Substance:** Who are you trying to reach, and why?
- **Structure:** Where is your content? How is it organised? How do people find your content?

People components

- **Workflow:** How does your content happen?
- **Governance:** Do you know the politics, guidelines, and standards that your brand operates in? (Halvorson, 2010).

As you can see, Halvorson suggests that one consider the bigger picture of content creation rather than just the product, which is the end result. Content marketing looks at staff, tools, processes, and outcomes. The end goal for these processes is conversion. All content should be created with a strategic outcome in mind. Such outcomes could include talkability, referral, affinity, and, ultimately, purchase or increased usage of your product or service.

9.4 STRATEGIC BUILDING BLOCKS

Before you create any content, you need to look at the strategic building blocks that underpin your company's narrative. Let's unpack this.

9.4.1 Translating your brand essence

The brand essence sums up the unique attributes of a brand and the basis for its emotional connection with customers. Remember that your emotional connection with your customer is the very thing that differentiates your brand from your competitors. Your brand essence should help to define a tone of voice for your label and the style in which it engages with its customers. The brand essence can be a useful guide for ensuring that the content you create (and your marketing activity) represents the brand appropriately. You can relate this to your brand story. What is your reason for being? How do you connect that with the interests of your customers? What is the value you add to your customers' lives? Is it convenience, health, status?

Consider a brand like Mercedes Benz. Their essential product is transportation, but the brand offers so much more than that to its customers. For example, it provides a sense of safety and security; customers know they are driving a car with the latest safety technology. But the brand's most powerful aspect is the sense of achievement and status that owning a Mercedes Benz provides. The value of the brand is less about the product itself and transporting passengers, and more about the feeling and status the customer gets by owning the product.

'Will It Blend?' is a video series by Blendtec, which builds on this principle. Blendtec produces industrial blenders. Their value proposition is that they can blend anything. Their viral marketing campaign consists of a series of infomercials demonstrating the Blendtec line of blenders. In the show, Blendtec founder Tom Dickson attempts to blend various unusual items in order to show off the power of his blender.

Figure 9.2 Blendtec produces a series of entertaining videos focused on blending objects discussed in popular culture, such as iPhones

9.4.2 Market research and consumer personas

The sweet spot for content marketing lies in an intercept between the marketing goals of a brand, the brand personality as it guides and differentiates that brand in the marketplace, and the consumer motivation for paying any attention to a brand at all. One device that is used in addressing consumer needs is the development of a consumer persona.

A persona is a profile that a writer creates to embody the aggregated characteristics of the target audience for whom they are writing. It helps to personalise the brand. Personas are based on the profile of users of your content. Creating a profile is all about considering the characteristics of your customers and their needs and desires.

For example, a brand like Philadelphia Cream Cheese could have a couple of customer personas.

On the one hand, it can represent a busy father, who works full time, but still wants to provide healthy and nutritious lunches for his family.

On the other hand, it can represent a young foodie, who wants to try new recipes she finds online from international celebrity chefs to impress her friends at dinner parties.

Each persona would require slightly different approaches when developing content. Both would benefit from videos featuring recipes. But while one would likely appreciate regular, basic options for lunchboxes, the other would probably prefer a celebrity endorsement or a celebrity-hosted video featuring finer, more elaborate meals.

It's important to focus on the motivations of the persona that you may create, rather than exterior signifiers that lead to the creation of a stereotype. With this in mind, reconsider the above personas. A busy father, who works fulll time, may still be interested in creating elaborate, healthy, and nutritous lunches. Similarly, consider the gendered binary here (i.e. men don't have time to cook, women have all the time). The persona assists you in segmenting

and understanding your target market and is a framework through which you can guide any content that you create.

9.4.3 Creating content themes

Linked to the brand identity are certain themes or concepts. These are areas of focus that support the creation of content that match a consumer's interest. These themes must be true to the brand essence, not focused directly on sales, and should also speak to the interests of the audience.

Content planning approach
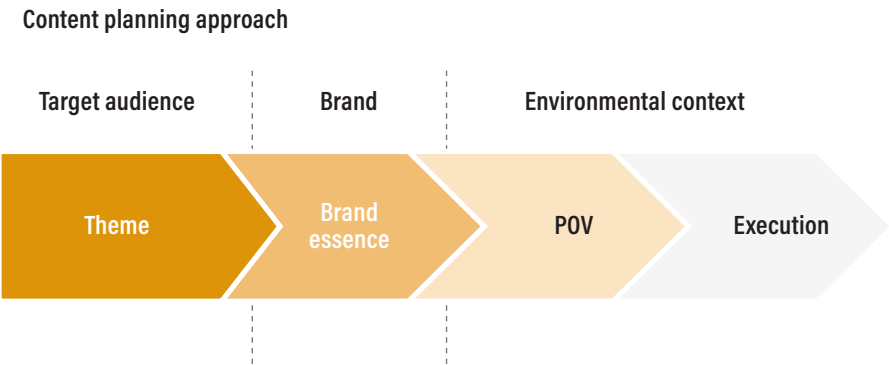
Figure 9.3 Content themes can be considered in line with the brand's essence, and then situated within the context of the reader

Consider Coca-Cola, for example; consumer interests filtered through the brand essence of 'taste the feeling' could result in themes such as refreshment, joy, friendship, and enjoyment.

These themes are then used as the basis on which to develop content ideas.

Figure 9.4 Coca-Cola expresses their brand essence in all of their communications, as demonstrated in the Tweets above

In the above tweet, we can see how a particular content theme was translated into a question that is focused on relationships and family. It also encourages engagement from the audience by asking for their input.

Another example which demonstrates this is how Corona beer brought their brand essence to life through an interactive documentary. The essence of the brand is to live the extraordinary and provide amazing experiences to its customers. The documentary depicted a group of people from Bulin in China, officially the town furthest away from any ocean in the world, encountering the ocean for the very first time. A truly extraordinary and amazing experience, facilitated by Corona. You can view it here: coronaextra.eu.

9.4.4 Matching content formats to objectives

Information can be presented through any number of mediums, which is both an opportunity and a challenge faced by content marketers. Traditional print distribution allows for magazines, pamphlets, and even events. Digital distribution allows for videos, images, interactive info-graphics, GIFs, live photos, live video, cinemagraphs, and any number of other formats. To gain and keep the attention of consumers/users, it's sometimes not enough to rely simply on text-based forms of content. The role of the content marketer is to select the right medium based on overall objectives, production capabilities, and the needs of the audience. Consider Figure 9.5 on the next page, which illustrates different forms of content that support different objectives.

As discussed in **Chapter 4: Strategy**, determining your objectives is an essential part of your marketing planning; it should feed into your content marketing strategy, and ultimately the business strategy. Understanding the journey your consumers go through as they approach your sales goal will enable you to match content formats to their needs. A humorous video may be successful in initially making potential customers aware of your brand. However, once you have their attention, a research paper or useful case study could be more effective in convincing them that you are the best choice in the market.

PricewaterhouseCoopers (PwC) is one of the largest international financial consulting firms, offering a range of financial services and advice across the globe. Every year they publish valuable content and guides to assist their customers with tax and wealth management. You can find the 2022 guide here: pwc.com/us/en/services/trust-solutions/private-company-services/library/tax-wealth-planning-guide.html.

There are many examples of online journalism using multimedia to convey information most effectively to their users. *The New York Times* has presented a number of different methods for conveying complex information in an engaging manner. 'Snow Fall' by John Branch is one example: nytimes.com/projects/2012/snow-fall/#/?part=tunnel-creek.
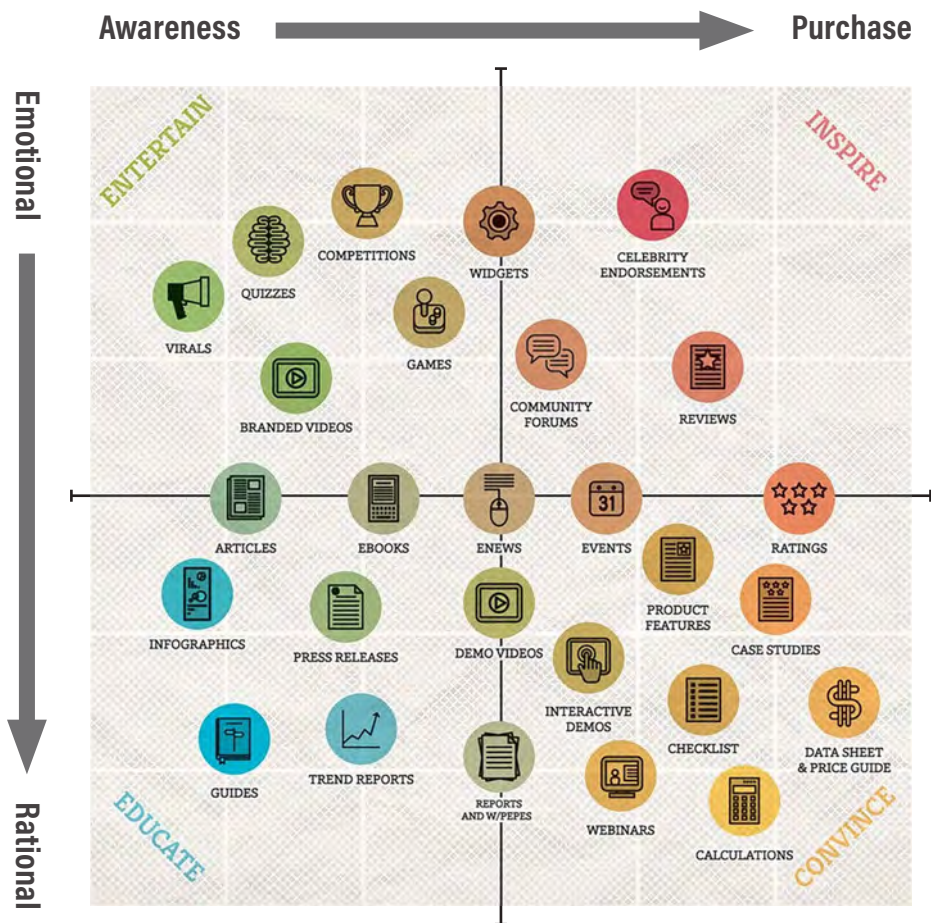
Figure 9.5 Different forms of content will support different objectives

Figure 9.6 *The New York Times* is a media brand that has embraced interactive media features for presenting complex news stories

The New York Times also often publishes infographics that demonstrate this principle powerfully.

Because users consume content across multiple screens, multimedia is necessary to ensure you keep the audience engaged, and they do not get bored with your content. See this infographic on the importance of exploring different types of multimedia with content marketing: blog. marketingv2.com/the-importance-of-multimedia-content-in-your-marketing-strategy.

To take advantage of these various forms of content delivery, it is necessary to build the correct capabilities. But how do you determine what forms of content you need?

9.4.5 The content audit

Once you have established your marketing goals, your brand personality, and a guiding understanding of who you are trying to reach, the content audit is a necessary but sometimes laborious next step. The content audit involves a review of all the existing content supplied by the brand, such as the website, white papers, articles, videos, and content shared on social media sites.

An assessment can then be made of how well these pieces of content match the strategic needs of the brand, its audience, and the appropriateness to the chosen channel.

While you can either thoroughly immerse yourself in this process or attempt to get a more time-efficient overview, the goal is to map what is currently on offer versus what is needed to achieve the strategic objective. It is important not just to understand what you have and who accesses it, but also how it is currently organised, through which channels, and how often it is accessed by your audience.

Many practitioners suggest the use of a spreadsheet to achieve this. Content can be found to be either mismatched to the goals of the organisation or spot on. Most importantly, you can establish what is missing. Are your customer needs being addressed? Where do the opportunities lie?

9.5 CONTENT CREATION

In 1995 Steve Jobs famously said: "There's just a tremendous amount of craftsmanship in between a great idea and a great product" (Harris, 2019). It can be easy to assume content creators simply generate imaginative ideas, write (or record) them, and then publish them as a blog post, email message, or other content piece. Let's dive deeper into creating compelling content, and how to leverage this for maximum engagement with your customers.

9.5.1 Learning from publishers

Referring to a brand as a publisher refers to expanding the function of the marketer or brand manager, and opening up additional opportunities to influence and/or convert. Rather than focusing on the immediate sale or conversion, a publisher focuses on value and interest for the user and building a relationship based on supplying information, inspiration, or entertainment that

suits the customer's needs. Makeup.com by L'Oreal is an oft-cited example of a brand publishing useful tips and content that does not link to a product or sales directly, but demonstrates how the brand can facilitate the lifestyle consumers desire or aspire to. In content marketing, a brand has to give customers more than just the product or service.

9.5.2 Resource planning – thinking like a publisher

Content marketing touches on a number of departments in an organisation. Marketing, sales, customer service, corporate communications, human resources, and website management teams should all be aware of the content marketing strategy for a business. Coordinating content between these teams can be challenging, if not impossible, if turnaround times are tight. This is why it is important not only to look at where content production should live in your organisation, but also to map the workflow of content creation, an essential function. Are designers involved? Where does quality control take place? Where can a piece of content be adapted and reused on a different distribution channel?

Some organisations opt to have a central role for someone to oversee content; others build in-house departments. Factors to consider are budget, creative control, approval and sign off processes, objective perspectives, and full-time versus freelance resources. Whether you are outsourcing to a publishing house or training a team in house, the decision must be made and planned for so that workflow can be mapped to facilitate your strategic needs.

9.5.3 'Always-on' content planning

Given that a large part of the global population is constantly engaging with content via various digital devices and platforms, it is necessary to consider content creation in terms of not only short campaign bursts, but ongoing delivery and engagement. Consider the illustration below.

Content frequency // An 'always-on' approach
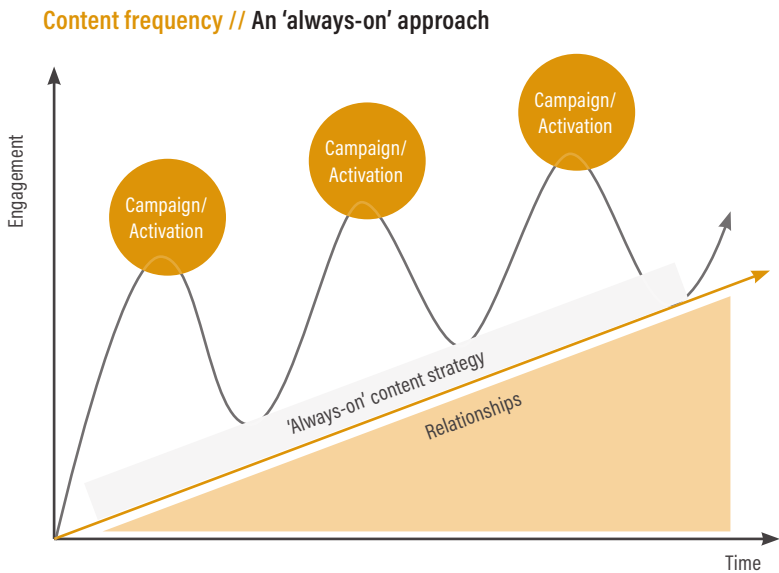
Figure 9.7 An 'always-on' content strategy approach builds relationships and engagement

By constantly engaging with audiences, which is well suited to social media, for example, it is possible to build and maintain a relationship with customers/users. As illustrated in Figure 9.7 constant engagement is built by a constant presence and amplified by shorter-term campaigns.

9.5.4 Content models

Your organisation's content requirements and objectives should determine the structure of your content teams. Do you have a need for ongoing content creation, or are there less frequent, high-input forms of content that will benefit your organisation? There are many models that are constantly evolving, so invest in some research around what will suit your organisation. We have outlined two approaches below, namely stock and flow.

Stock and flow

Stock content refers to bigger, beautiful assets that require more investment and age well, meaning that they will be interesting in six months as well as today. 'Inside Chanel' by Chanel, is an example of this. High-production value documentary type videos are created and sponsored by the brand to achieve awareness and develop brand affinity across its target market. You can visit the Chanel channel on YouTube here: youtube.com/user/CHANEL.

Figure 9.8 The Time of Chanel – Inside Chanel. Stock videos created to achieve awareness and brand affinity

Flow content has a lower production value and a quicker production and publishing time frame. Images depicting what is going on at a business on any given day, for example, freshly baked goods at a bakery, can be placed in this category. Weekly or even daily blogs, as well as event and holiday themed content, would all be considered flow.

Both types of content should be considered for balancing out a content strategy. It can also be useful to consider destination and distributed content, i.e., content that you are either sending out to the world through various platforms and networks, or which pulls your user towards a page on your website or an article on your blog. Rather than focusing solely on driving users to your owned media spaces, such as your website, consider how to create content that engages with your target audience in the spaces and platforms they use online.

9.6 CONTENT CHANNEL DISTRIBUTION

There's no return on investment if your content doesn't reach viewers and readers. Engaging content needs to reach the customer, otherwise all your efforts are in vain. It is not a case of loading more keywords in your content; you also need to understand what constitutes high-quality content for the major search engine's algorithms.

9.6.1 Algorithmic curation

Algorithmic curation is a term that refers to the algorithms that platforms have created for dealing with information overload. Various platforms, like Facebook, Twitter, and the search engine Google, use algorithms to filter out the amount of information that is delivered to users. Each algorithm will use a number of factors to determine what is actually relevant and interesting to the user doing a search or looking at their news feed.

One of the factors that influences whether a piece of content is considered relevant is how much an individual engages with the brand's presence on that platform over time. Posts shared by a Facebook page, for example, may reach only users who have previously engaged with posts from that page through commenting or liking. It is therefore important to create content that encourages engagement and sharing.

Increasingly, SEO and content marketing have to work together if they are to reach their audience and achieve their objectives. Without good content, SEO will struggle, and without SEO even good content will not be seen. SEO approaches content differently to content marketing. SEO wants the content as narrow and focused as possible, so that they can give the right answer to the right user while users are searching. It also recognises the need for enjoyable, shareable content, as this improves search rankings and earns backlinks. Content marketers, however, prefer broader content that focuses on the quality and exposing the content appropriately (Postan, 2016).

> **NOTE**
> For more on aligning content marketing and SEO go to this blog post by Outbrain: www.outbrain.com/blog/content-strategy/.

Considering that people post 6000 tweets every second of every day (Polgar, 2021), algorithmic curation becomes a useful solution to package this massive amount of content into a manageable format. However, it also transfers the decision-making power from the individual to the platform. This is perhaps the biggest drawback of this process as the 'platform assumes control of shaping a user's experience with the site and media diet'. We experience what some people call the 'paradox of choice' which holds that too many potential choices degrade our ability to make a selection. Netflix is doing just that with their 'Play something' function that will automatically play a movie based on their algorithm. In this case Netflix is deciding on your information diet (Polgar, 2021).
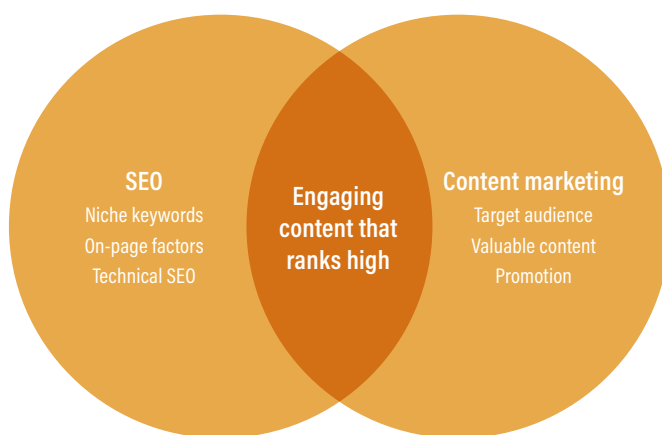
Figure 9.9 Engaging content that ranks highly is achieved
when SEO and content marketing work together

9.6.2 Understanding channels and platforms

Understanding the channels through which you share content is as important as the crafting of that content itself. Reaching people effectively will only be achieved if the medium supports the message and vice versa. Social media, email marketing, mobile marketing, and video marketing are just some disciplines that form part of your content creation arsenal. The rest of this book is dedicated to best practice in communicating effectively through the various digital disciplines available to you.

9.7 TOOLS OF THE TRADE

In order to support the ongoing production of interesting content, it is necessary to have some planning documents in place. Consider the following:

Brand style guides

This document guides anyone creating content for a brand at any time. What is the tone of voice and brand personality? How is it best represented visually, and what are the brand colours and fonts? This can be a challenging document to put together, and it usually isn't the content marketer who is tasked with doing so, but is essential to aligning brand communications. It is also a document that tends to be 'live', as it is constantly updated as the brand and content landscapes evolve and new conventions come into play. Brand style guidelines are also referred to as Corporate Identity (CI) or Brand Identity (BI).

Content calendars

Content calendars assist the content marketer in planning the material they will be sharing, across which platforms, and when. The more advance planning is undertaken, the easier it is to react quickly to tactical opportunities.

Figure 9.10 A content calendar for social media

Workflow map

A workflow map documents the path a piece of content takes when it is created. What are the steps in approval, how is it optimised for digital publishing, who has final sign off? Is it a duplicate of existing content, and where else can it be used? A workflow map assists you in streamlining this process. It is useful to have this graphic overview of the process. The workflow map stipulates the order in which the work is to be completed, and show who is responsible at specific points.

Figure 9.11 A content workflow, mapping the development of content

Persona map

As discussed, the persona map assists content creators in focusing on those for whom they are in fact creating content and what the motivations of consumers may be.

TASKS
What tasks are users trying to complete? What questions do they need answered?

FEELINGS
How is the user feeling about the experience? What really matters to them?

INFLUENCES
What people, things or places may influence how the user acts?

NAME

PAIN POINTS
What pain points might the user be experiencing that they hope to overcome?

OVERALL GOAL
What is the user's ultimate goal? What are they trying to achieve?

Figure 9.12 An example of a persona map

9.8 ADVANTAGES AND CHALLENGES

Content marketing can position your brand as an expert through the sharing of useful content in your specific field. It also enables you to reach the customer who has a fragmented attention span spread across many devices and content touchpoints.

One of the more powerful benefits is that you can learn a lot about your target consumer through the content with which they do or do not engage. The more targeted and ongoing your content, the more data you can gather about how effectively you are reaching those you need to.

One of the great challenges in content marketing is providing content that is truly interesting and engaging to the right people with the right mix of subject matter and brand. Matching content to the required outcome for your strategic purposes takes dedication and focus. In the context of ongoing content production, it can also be a challenge to maintain levels of quality over time, which is why process and quality assurance steps must be put in place. Consider that the goal is not to create as much content as possible; rather, it is to focus on relevance and content that matches strategic outcomes.

9.9 CASE STUDY: TOSHIBA AND INTEL: THE BEAUTY INSIDE

Toshiba and Intel, two electronic giants, wanted to boost awareness of their respective brands.

One-line summary

Toshiba and Intel paired up to create an extremely successful social storytelling campaign that refreshed the 'Intel inside' slogan and boosted awareness of the new Ultrabook.

The problem

Intel and Toshiba both wanted to create an opportunity to interact and raise awareness with younger consumers, aged 18–34 years old. They knew they didn't want a regular ad, but something that would really engage the audience and get them to interact with the brands.

The solution

The solution presented itself as an interactive social film called 'The Beauty inside'. The film starred real Hollywood actors and was a film about a character named Alex, who wakes up every day as a different person. On the inside, he is the same, but on the outside, he looks like someone different. The story was about the fluid nature of identity and that despite outside appearances, it is what is inside that counts.
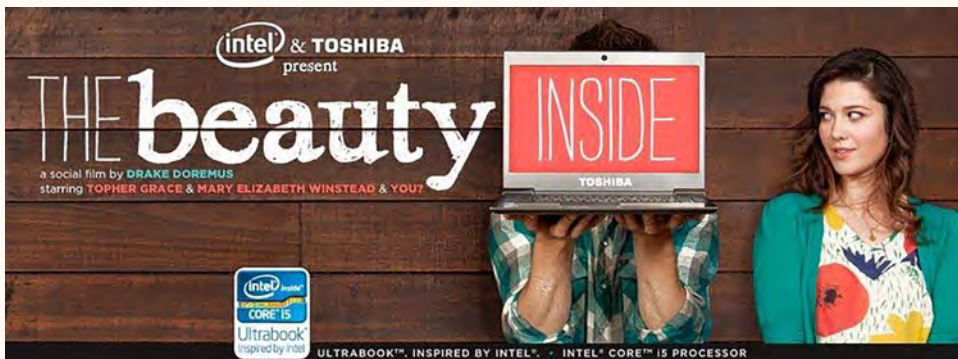
Figure 9.13 'The Beauty Inside' campaign for Intel and Toshiba

The campaign included a strong social element. Due to the changing nature of Alex, he could be played by anyone, and fans were invited to audition via the brand's Facebook application for the role. Those chosen would star in the professionally filmed episodes with real Hollywood actors. Additional audience-created content was also shared in the Alex story on the Facebook page.

Watch this video about this incredible case study: www.youtube.com/watch?v=qyMQIMeSCVY.

The results

Over 26 fans were cast in the film as Alex, chosen from over 4 000 contenders. An additional 50 Alexes were featured on the 'The Beauty Inside's Facebook Timeline'. The content resonated with the audience, and the social nature of the film sparked engagement and shares.

The results of the campaign were:

- 70 million video views
- 97% YouTube approval rating
- 26 million social interactions
- 40% lift in brand perception for Toshiba
- 66% lift in brand perception for Intel
- Increase in sales of 300% during the event, when compared to previous weeks (Digital Training Academy, n.d.).

This case study is a great example of how providing content with strong entertainment value to customers and engaging with them on an emotional and social level, can have dramatic results.

9.10 CASE STUDY QUESTIONS

1. What is brand storytelling?
2. Why do you think Intel and Toshiba chose this option?
3. What, in particular, do you think drove the dramatic lift in brand perception for both brands?

9.11 THE BIGGER PICTURE

Content is a significant component of many digital marketing disciplines. When creating content, you should always keep the principles of writing for the web in mind.

Email marketing: This relies on great content since most people suffer from email fatigue. They will only stop to read emails that they know are of high quality and that provide excellent content.

Social media marketing: This depends also on sharing relevant and valuable content with social fans. While your brand promise may get users to your social page, your ongoing stream of quality content will encourage customers to interact and share, spreading the word about your company. If your content is great and really resonates with your audience, it could go viral.

Search engine optimisation: This is strongly influenced by the quality, frequency, and value of content. Not only will search engines favour your site, but others will choose to link to your content, creating a valuable referrer for your brand.

Video marketing: This is a whole new approach to content, in which you create dynamic and shareable videos specifically tailored to the interests and needs of your audience.

Mobile marketing: This requires that you consider the unique requirements of your audiences across a series of devices. If you understand the role that each device plays in a user's life and buying cycle, you structure content according to user purpose and frame of mind.

9.12 SUMMARY

Content marketing presents a pull mechanism for the marketer rather than a push one. It's a gentler approach to traditional advertising and product or price promotions. Brands must consider their brand identity and the market they are trying to reach in order to create targeted and valuable brand content that delivers on strategic objectives.

It's about more than creating a piece of content. Content marketing strategy looks at how you structure your organisation to create that content and how you match specific types of content and methods of delivery for achieving strategic outcomes.

These ideas need to resonate with people rather than simply existing across an array of media with which they are presented.

9.13 CHAPTER QUESTIONS

1. What is content marketing strategy? How does it compare to business strategy?
2. Why is the customer journey or buying cycle relevant to content marketing strategy?
3. How do you decide what new forms of content your brand needs?

9.14 FURTHER READING

contentmarketinginstitute.com/blog – The official blog of the Content Marketing Institute.

contentstrategy.com – Content strategy for the web.

semrush.com/blog/content-marketing-examples – 27 Examples of Inspiring Content Marketing for 2022

the-cma.com – The Content Marketing Association website; news, research, and case studies on content marketing.

9.15 REFERENCES

Blendtec, n.d. Will it Blend? [Online]
Available at: www.blendtec.com/pages/will-it-blend
[Accessed 25 May 2022]

Bosomworth, D., 2013. The Content Marketing Matrix. [Online image]
Available at: www.smartinsights.com/wp-content/uploads/2012/05/content-matrix.jpg
[Accessed 25 May 2022]

Bowman, M., 2017. Video Marketing: The Future Of Content Marketing. [Online]
Available at: www.forbes.com/sites/forbesagencycouncil/2017/02/03/video-marketing-the-future-of-content-marketing/#27eb8d106b53
[Accessed 25 May 2022]

Content Marketing Institute, n.d. What is Content Marketing? [Online]
Available at: contentmarketinginstitute.com/what-is-content-marketing/
[Accessed 25 May 2022]

Digital Training Academy, n.d. Content Marketing case study: How Intel and Toshiba got an audience of 70 million with social storytelling. [Online]
Available at: www.digitaltrainingacademy.com/casestudies/2015/03/content_marketing_case_study_how_intel_and_toshiba_got_an_audience_of_70_million_with_social_storytelling.php
[Accessed 25 May 2022]

Halvorson, K., and Traffic, B., 2010. Core Strategy. [Online image]
Available at: conversationagent.typepad.com/.a/6a00d8341c03bb53ef0147e077f98a970b-320wi
[Accessed 25 May 2022]

Harris, J., 2019. Content Creation Process: The Essential Guide. [Online]
Available at: contentmarketinginstitute.com/2019/09/content-creation-essentials/
[Accessed 30 May 2022]

Ingserv, n.d. Publish new press release. [Online]
Available at: richardingram.co.uk/downloads/110318_pr_workflow_example.pdf
[Accessed 25 May 2022]

Kloot, L., 2021. 9 Steps to building a Content Strategy that Gets Results. [Online]
Available at: www.outbrain.com/blog/content-strategy/
[Accessed 25 May 2022]

Liubarets, T., 2013, Is Your Website in Dire Need of a Content Audit? [Online]
Available at: writtent.com/blog/is-your-website-in-dire-need-of-a-content-audit/
[Accessed 25 May 2022]

Maltoni, V., 2010. Kristina Halvorson, Content Strategy. [Online]
Available at: www.conversationagent.com/2010/12/kristina-halvorson-content-strategy.html
[Accessed 25 May 2022]

O'Brien, J., 2012. How Red Bull Takes Content Marketing to the Extreme. [Online]
Available at: hmashable.com/2012/12/19/red-bull-content-marketing/
[Accessed 25 May 2022]

Polgar, D.R., 2021. What Are All These Algorithms Doing to Us? [Online]
Available at: builtin.com/software-engineering-perspectives/algorithmic-curation
[Accessed 19 June 2022]

Vipat, R., 2013. Digital Marketing of Nike. [Online]
Available at: www.slideshare.net/ojasvipat/final-digital-marketing-at-nike
[Accessed 25 May 2022]

We are Cognitive, 2011. Coca-Cola Content 2020 Part One. [Online]
Available at: www.youtube.com/watch?feature=player_embedded&v=LerdMmWjU_E
[Accessed 25 May 2022]

9.15 FIGURE ACKNOWLEDGEMENTS

Figure 9.1: Adapted from Halvorson, K. www.conversationagent.com/2010/12/kristina-halvorson-content-strategy.html

Figure 9.2: Screenshot, Blendtec. n. d.

Figure 9.3: Stokes, 2013

Figure 9.4: Screenshot, Twitter, 2021

Figure 9.5: Bosomworth, 2012 www.smartinsights.com/wp-content/uploads/2012/05/content-matrix.jpg

Figure 9.6: Screenshot, New York Times, 2013

Figure 9.7: Adapted from Stokes, 2013

Figure 9.8: Screenshot, YouTube Inside Chanel, 2017

Figure 9.9: Outbrain, 2017

Figure 9.10: Small Business trends, n.d.

Figure 9.12: UXPin, n.d.

Figure 9.13: Contently, 2016 contently.com/2016/01/06/the-new-hollywood-why-brands-are-making-movies/

Intel&Toshiba logo: commons.wikimedia.org/wiki/File:IntelandToshiba.jpg

10

PLANNING YOUR CONTENT

In this chapter, you will learn:

- How content planning differs from content strategy
- About the importance of content-related research
- How to plan and start creating content
- About the methods used to distribute content.

10.1 INTRODUCTION

Now that you have a solid understanding of the role of content marketing and developing your content marketing strategy, it's time to start planning. You would have learned about the overarching themes, messages, brand essence, and other guidelines that derive from your brand and marketing strategy. For consistency and brand alignment, your content must always adhere to these strategies.

As part of successful content marketing, developing a content plan that produces engaging content is essential because it provides the structure that decides what, when, where, why, and how an activity or initiative will be executed to meet the marketing objectives. A content plan relies on the content strategy to guide its deliverables because it outlines your goals based on your audience, industry, and competitor analysis. Your plan will focus on the details that show what you are going to do and how you will use the resources to achieve the expected goals.

In today's always-on, technology-driven environment, it is essential for any business with a digital presence to connect with people with the right message at the right time. This chapter looks at how to create a content plan that delivers, reaching and exceeding these goals.

10.2 KEY TERMS AND CONCEPTS

Table 10.1

Term	Description
Content audit	An assessment and evaluation of the existing content that a brand publishes.
Content brief	An instructional document that provides the writer with information that guides what is expected from the piece of content to be written.
Content optimisation	The process of writing content in a way that it may reach the largest possible target audience on the web.
Content strategy	The discipline that is responsible for guiding the planning, creation, development, and management of content in line with business goals.
Editorial calendar	A schedule that serves as a central calendar for content producers that shows the content topics, formats, platforms, production timelines, workflows, and deadlines for all involved in the editorial process.
Storytelling	Writing and sharing a story that represents a relatable experience that will interest, connect, and or engage the target audience.

10.3 DEFINING CONTENT PLANNING

The content plan is a complete structure that documents how you will create and disseminate your content for optimal audience engagement and reach. It also outlines who is responsible for creating the content, what the content's purpose is, and how it will impact your overall content strategy. The content plan includes all your marketing assets and data needed to achieve your business goals. You'll use it to research, create, publish, and track your content.

The purpose of content planning is to create meaningful, relevant content that will connect, engage, and inspire your target audience to buy your product or service. It will focus on growing the audience either in numbers or in support of the brand. A successful content plan will consistently attract customers and build brand loyalty over time.

The diagram below shows a content planning approach from the theme through to execution:

Content planning approach
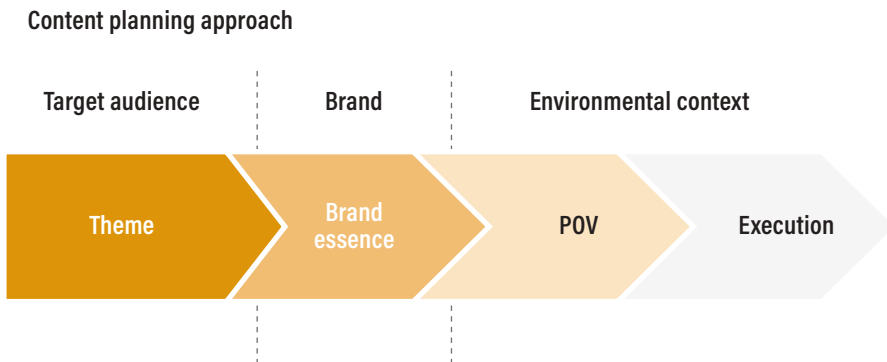
Figure 10.1 Content themes are considered in line with the brand's essence in the context of the reader

When planning your content, use your theme as the basis for your topics to target your audience. Your brand positioning and promise will determine the essence, tone, and style of your content, and the environmental context will influence the point of view (POV) and execution of your content.

As an example, for Coca-Cola, consumer interests filtered through the brand essence of 'Happiness' could result in the following themes:

- Fun and enjoyment
- Pleasure
- Magic.

> **NOTE**
> According to Finkle (2019) brand essence is the 'reliable feeling customers come to expect when they interact with a particular brand'. Read his article here: brandmarketingblog.com/articles/good-branding/brand-essence-examples/.

These themes are then used as the basis on which to develop content ideas.

Figure 10.2 Coca-Cola expresses their brand essence in all their communications

In the above tweet, we see how a particular content theme was translated into a statement that is focused on desirable relationships and family. It also encourages engagement from the audience by inviting participation and immediate pleasure for fans to tag a big brand for everyone to witness their moment online.

10.4 CONTENT STRATEGY

Often used interchangeably, content planning and content strategy really are different concepts. Your strategy will guide content planning and development for the marketing channels where your content will live to deliver against a specific business objective. It will include how you will set out to achieve the different content marketing goals.

> **NOTE**
>
> A successful content marketing strategy is guaranteed to help you drive traffic, increase conversions, and really establish your brand online. Read this article: edgy.app/5-essential-elements-of-successful-content-marketing-strategies.

Content strategy focuses on application to achieve your objectives. It may also be more comprehensive than the content marketing strategy, because it should include all the content that exists in the business, in addition to the content that you will be creating.

Your content strategy will answer the following questions:

- Who are your users?
- Who are your competitors?
- What do you bring to the table?
- What do you hear from your target audiences?
- What content do you already have?
- What is the purpose of your content?
- How often should you be publishing?
- How will you distribute your content?
- Who oversees your content?
- Who will produce your content?
- Who is going to maintain your content?
- Who is responsible for the results?
- What is your destination?

> **NOTE**
> Read more about this here: "13 Simple Questions to Help You Draft a Winning Content Strategy": copyblogger.com/winning-content-strategy.

Your content plan will put all the answers to these questions into action.

10.4.1 Content themes

Content themes, or pillars, should form part of your content strategy. You can focus on key themes or topics to guide your content production rather than trying to write about everything under the sun. Make sure they are themes that tie back to your brand in some way; relevance is key in building your brand's community through content and storytelling.

The themes you choose should be underpinned by your brand essence, which acts like a branded 'filter' through which you view that content theme. This way, whenever you create content, it ties back to the brand via one of the content themes.

A brand could, for example, have innovation, sustainability, and people pillars – these would tie into the brand essence, and each piece of content they create would relate to one of these themes in some way. A car brand and an alcohol brand could both use sustainability as pillars, but their content execution would differ based on brand essence. You need about three to five pillars to give you enough structure but also some leeway in the content you can create.
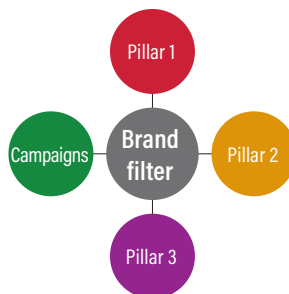
Figure 10.3 The brand essence needs to underpin and be the focal point of every content theme you create

How do you create your content themes the right way? In earlier chapters, you learned about your brand essence. What is your reason for being? How can you connect that with the interests and needs of your customers? How can you create an emotional connection with them? This brand essence will contribute to your choice of content themes.

The themes also need to be relevant to your target market. For example, a financial institution isn't going to offer information about new recipes – this could have a negative impact on their credibility. However, a small business with a lot of face-to-face interaction with customers could share some behind-the-scenes insights on a regular basis.

Let's look at an example. A brand selling energy drinks has the brand essence 'energy for people on the go'. The target market is adults who work hard and play harder, and who earn enough to have some luxuries in life. The content pillars will focus on this. They could choose:

- Extreme sports
- Work life
- Living the high life.

These themes will give you direction for the content you create for your communities on social media. A content pillar called 'music', with the brand guiding it, will go from a generic concept of music to something that can be inherently tied back to the brand based on its brand essence.

> **NOTE**
>
> Read more about content pillars here: semrush.com/blog/building-high-performing-content-pillars/.
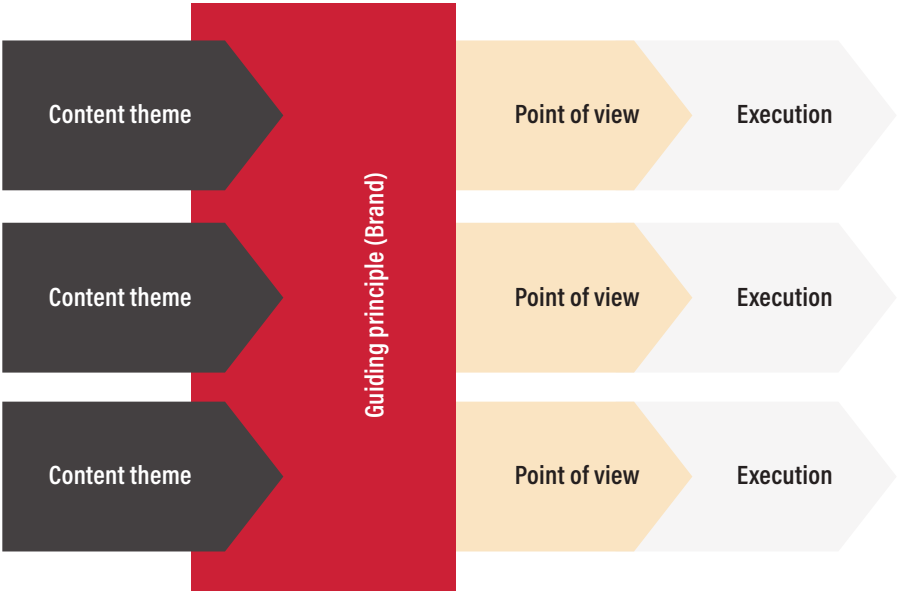
Figure 10.4 The content theme informed by the brand essence to create a point of view that leads to the content execution

10.5 CONTENT RESEARCH

Before you start to think about creating your own content, you need to do some research to make sure you know exactly what you want to communicate, to whom, when, where, and how. To do this, you will use the information from your content marketing strategy that will include:

• Your brand essence
• Your audience
• Your customer experience
• Your marketing objectives and goals.

What's left? You still need to know what kind of content you already have so that you can decide what you still need to create. This requires a content audit.

10.6 CONTENT AUDIT

A content audit is a thorough account of all the content your business currently has, where the gaps are, and what needs to be created going forward. As with any project, it's vital to figure out where you stand before you can start moving forward. Here's the step-by-step approach to performing a content audit:

Step 1: Make an inventory of existing content

Examine all the brand's existing channels, including online, mobile, offline media, advertising, brand collateral, and any content published elsewhere on behalf of the brand, like press releases or interviews.

Look for any content publishing or output channels that are already in operation. For example, you may have a monthly email newsletter for which you create content articles or news pieces. Social media is another channel that may already have a content production process in place, even if it has not been formalised under this name.

Any manuals, handbooks, help guides, or other customer support materials that your company has produced are also content.

List all the content that you find in a spreadsheet and be as detailed as possible. Include the following:

• The subject matter of the content
• Its format (e.g., image, video, infographic, research paper)
• The channel it is published on (e.g., website, blog, brochure)
• The quality of the content
• The purpose of the content (e.g., educational, promotional, informational)
• Whether the content is still current and relevant or out of date
• Whether the content can be reused or not (considering any rights or exclusivity deals)

- For online content on your website, include some web analytics data, like how many views and links the specific web page has.

Step 2: Identify gaps and problems

As you catalogue your content, you will pick up problematic content and areas where something is missing. You may find no content that addresses a key customer persona, or you may have discovered that you have focused too much on awareness without creating excitement and purchase intent.

To help you identify any problems as you work, ask:

- What are the business goals and objectives for each channel? Are they being met effectively?
- What are the customer's goals and needs from the channel or content? Have these been addressed?
- Are there any likely problems, points of confusion, or complexities that the customer is likely to face? Have these been explained or mitigated adequately?
- Is existing content valuable, interesting, and relevant? Can it be improved, perhaps through multimedia like images, videos, interactive tools, or downloads?
- Is the content formatted to be accessible on the relevant devices that customers are likely to use?
- Is the level of information uniform? For example, do all product pages have a help guide, features list, or explainer video?

Make note of any kind of content that the brand needs but doesn't have. Perhaps a new product lacks a user guide, or the company's 'About us' page is entirely out of date.

Step 3: Fix the problems

Now that you know what the problems are, you're unlikely to have the resources to tackle them all at once. To begin, catalogue them in order of urgency and importance. Three categories should do it:

1. **Must be fixed immediately:** Some gaps or problems need to be addressed straight away, like missing key product information or customer support materials. These should be addressed by engaging your content creators and providing them with the business need and persona to address as soon as possible.
2. **Can be addressed through ongoing content creation:** Since you're about to embark on a long-term content strategy, think about whether any of the problems can be addressed by the content you plan to create, and move this up the queue. For example, customer support materials can be generated through blog posts, forums, videos, and more. You could even make this a regular content feature ('top questions of the week').
3. **Not urgent:** This is a 'nice-to-have' that can wait until someone has a free moment. It can be slotted into the content production schedule without disrupting existing workflow.

10.7 CONTENT MARKETING WORKFLOW

Once you've done your content audit and know what elements need to be added to your overall content plans, you will still need to know exactly what process any piece of content goes through when it's created, and who's involved. That's the content marketing workflow. You should identify three phases:

1. **Planning:** Major decisions will be made and research performed here. Consider timelines, content types, objectives, possible destinations, and consultation with experts.
2. **Creation:** The content team works on producing the content. Different media has different timelines and production processes. For example, a blog post can be written in a few hours, a video could take days or weeks, and a conference could take even longer.
3. **Quality control:** The finished content should be checked and approved by relevant experts and gatekeepers before it is published.

> **NOTE**
> Online tools like Percolate by Seismic.com can help manage this workflow.

> Think about this example: A free online guide would start with expert consultation and research, an outline that would need to be approved by the expert and the marketing manager, and images that would need to be briefed in with the designer and scheduled with their line manager. Several drafts of writing later, you'd need to do some copy editing, layout, expert review, managerial approval – and then, assuming no changes are necessary, you could publish it.

10.7.1 Planning

Content planning requires examining multiple aspects of where your content will be placed, what will go into it, and how often it will be created. Your end goal is to create a content calendar and conversation plan.

Know what you have

You can't create content without the right resources to do so. Know what you have available, and what you might need for any content you come up with. The Content Marketing Institute points out three components you'll need to consider:

1. **Talent:** You need writers, researchers, developers, designers, and outreach specialists (relationship-builders)
2. **Tools:** You will need tools to help you manage and collaborate as a team
3. **Operations:** You need to consider the following:
   • **Organisation:** Focus on strong objectives and have processes written out
   • **Measurement:** Measure according to established metrics
   • **Feedback:** Consult with your team; should be able to provide feedback as well. Don't rely *only* on metrics.

Matching content formats to objectives

Information can be presented through any number of mediums, which is both an opportunity and a challenge that content marketers face. Traditional print distribution allows for magazines, pamphlets, and even events. Digital distribution allows for videos, images, interactive info-graphics, GIFs, live photos, live video, cinemagraphs, and any number of other formats. To gain and keep the attention of consumers/users, it's sometimes not enough to rely simply on text-based forms of content. The role of the content marketer is to select the right medium based on overall objectives, production capabilities, and the needs of the audience. Consider the illustration below:

Awareness → **Purchase**

Emotional / Rational

ENTERTAIN — INSPIRE — EDUCATE — CONVINCE

COMPETITIONS, WIDGETS, CELEBRITY ENDORSEMENTS, QUIZZES, VIRALS, GAMES, BRANDED VIDEOS, COMMUNITY FORUMS, REVIEWS, ARTICLES, EBOOKS, ENEWS, EVENTS, RATINGS, INFOGRAPHICS, PRESS RELEASES, DEMO VIDEOS, PRODUCT FEATURES, CASE STUDIES, INTERACTIVE DEMOS, CHECKLIST, DATA SHEET & PRICE GUIDE, GUIDES, TREND REPORTS, REPORTS AND W/PEPES, WEBINARS, CALCULATIONS

Figure 10.5 Different forms of content will support different objectives

As discussed in **Chapter 4: Strategy**, determining your objectives is an essential part of your marketing planning. You should feed into your content marketing strategy and ultimately, the business strategy. Understanding the journey your consumers go through as they approach your ultimate sales goal will enable you to match content formats to their needs. A humorous

video may be successful in initially making potential customers aware of your brand. However, once you have their attention, a how-to guide, thought leadership pieces, or useful case studies could be more effective in convincing them that you are the best choice in the market.

Deloitte Touche Tohmatsu Limited, more commonly known as Deloitte, is a multinational professional services network with offices in more than 150 countries in the world. As a multifaceted global entity, Deloitte positions itself as industry thought leaders and trusted experts. The brand regularly publishes its insights using articles, videos, podcasts, and interactive presentations to support their industry reports, analyses, and reviews.

You can view their latest Tech Trends 2022 report here: www2.deloitte.com/content/dam/insights/articles/US164706_Tech-trends-2022/DI_Tech-trends-2022.pdf.

There are many examples of brands that use multimedia to convey information effectively to their users. In the above example, Deloitte packages their Tech Trends report with a host of relevant, supporting online content – offering the reader options to understand the context of the report, including articles, analyses, video, and the report itself: www2.deloitte.com/us/en/insights/focus/tech-trends.html.

Because users consume content across multiple screens, multimedia is necessary to ensure that you keep the audience engaged, and they don't get bored with your content. Take a look at this infographic on the importance of exploring different types of multimedia with content marketing: blog.marketingv2.com/the-importance-of-multimedia-content-in-your-marketing-strategy.

To take advantage of these various forms of content delivery, it is necessary to build the correct capabilities. Firstly, you will need to determine what forms of content you need.

Figure 10.6 Results of a data collection study that asked what types of content people want

Editorial calendar (content plan)

We're about to introduce you to the terms editorial calendar, content calendar, and conversation plan. These terms are often used interchangeably by content marketers, but we've done our best to differentiate them for you.

An editorial calendar, or content plan, is a broad, longer-term outline of the content the brand plans to publish, based on its content pillars or themes. It has many benefits:

* You can schedule content in advance, ensuring that everyone agrees with deadlines, format, and theme.
* You can identify gaps in your content schedule so that you can fill them before it becomes a problem.
* You can plan around key company news and other scheduled events, like a conference, public holiday, or historical date. You can also keep track of significant sports events, festivals, holidays, and more.
* You will have room for structured flexibility. For example, if you have two product reviews planned for month end, and one product makes the news, you can change the order in your schedule without any confusion.
* It creates and manages audience expectations. Regular posting of specific kinds of content on specific channels and themes can give your fans a sense of familiarity, confidence in your brand, and anticipation.

HubSpot	TOPIC/TITLE	CONTENT/DETAILS	KEYWORD(S)	TARGET PERSONA(S)
MONDAY				
	12 Revealing Charts to Help You Benchmark Your Business Blogging Performance [NEW DATA]	Explain importance of blogging and how to benchmark your efforts to garuntee success	business blogging, blogging benchmarks	Owner Ollie, Mary Marketer
TUESDAY				
	Top SEO Tips Straight From the Industry Experts [INFOGRAPHIC]	Highlight SEO tips through expert advice while promoting complete guide	search engine optimization, SEO	Owner Ollie, Mary Marketer
WEDNESDAY				
	How to Craft the Right Questions for Your Next Marketing Survey	Use an exceprt from the Marketing Surveys ebook to provide readers beneficial survey best practices	marketing surveys, survey marketing	Owner Ollie, Mary Marketer
THURSDAY				

Figure 10.7 A content calendar from HubSpot

Content calendar (conversation plan)

A conversation plan is a more comprehensive, shorter-term version of an editorial calendar. In the content calendar you zoom in on one week or month in your editorial calendar to see specific details. This plan doesn't have to cover every single post for the month – you want

some room for changes and flexibility – but you should list at least a few planned posts per week for a month. Conversation plans can be created in a table as a word document or in an excel spreadsheet and should include some basic information.

POSTING DATE	DAY	CONTENT BUCKET	SOCIAL PLATFORM	
			FACEBOOK	TWITTER
1/03/11	Mon.	Mom conversation starters	The new year is a great time to evaluate your family's eating habits. What changes are you making?	Healthier snacks, organic ingredients…what are your family's new year's food resolutions?

Figure 10.8 A piece of a conversation plan from the Content Marketing Institute

Kevin Lee (n.d.) outlines some benefits of planning your content in advance as well as some tips on how to do so and Sprout Social gives some tips on using a content scheduler.

10.7.2 CONTENT CREATION

Once you have all your research done, it's time to start thinking about content creation. You can have a vague idea of the content you want, but you shouldn't start developing until you've thoroughly planned out your content. In the content creation process, you will identify a new topic that you want to write about, in line with your brand and content theme, and decide the form you want the content to take before creating it.

There are a few easy steps you can follow to create content for your brand and marketing objectives:

1. **SEO research:** Write quality content over a long period of time to ensure your brand ranks high in search engines. Keyword research will also help you decide on what content you want to create based on your search for specific phrases online.
2. **Ideation:** Once you've decided on the keywords you want to target, it's a good idea to brainstorm some content ideas. These will follow the content themes and topics in line with your brand and marketing strategy. Using all of your ideas, you can start populating your content calendar.
3. **Writing/Creating:** Always remember to write to your customer. Use titles and keywords that would appeal to your audience in ways that resonate. Think about creating something unique, but stick to one idea that will successfully carry through your message.
4. **Editing:** This process is important to maintain your tone, style, and brand persona. It also ensures consistency in how you communicate with your audience and what they have become accustomed to hearing about from you. Consider having someone else look at your content too – you may find the feedback useful.
5. **Uploading:** Once you have your content written and ready, share it on a common drive or content management system for the team to view, or to simply store it for later. This is valuable for storage, tracking, and measuring.

6. **Publishing:** This step of the process seems simple enough but often, requires some thought. You may want to publish your content immediately or save it for the optimal time to publish. You may also use this step to plan ahead for future announcements, reminders, or similar.

7. **Promoting:** To promote your content, think about where your customers are and use those channels. Whether they are on Facebook, Instagram, TikTok, or YouTube, it's important to advocate your content to reach, connect, and engage.

Writing tips

We have already covered copywriting basics in an earlier chapter. Here are some reminders and few quick tips:

* The length of your content should match the platform. Twitter needs shorter text posts than Facebook (though Facebook posts should be short as well!). YouTube can support longer videos than Instagram or Snapchat. Blogs can support longer articles than social media.
* Make your writing scannable.
* Write content that your audience wants to see. Do some research to find out what they're lacking.
* The topic of your content should match the platform. Snapchat and Instagram are both highly visual, but Snapchat is far less formal and carefully arranged.
* For longer content, make sure your headline or subject line (for emails) is enticing and exciting.
* Write content at a frequency that matches your chosen channel.
* Research hashtags before you use them. Several tools can help you find hashtags that are current and will help you get your content found.
* Use keyword, and theme your content.
* Check spelling and grammar! Very little makes a brand lose credibility faster than simple misspellings, particularly on short content.

Curation vs. creation

Creating content means producing your own tailored content for your brand. Curating, however, is collecting content from other sources and posting it – with the correct attribution – on behalf of the brand.

A mix of curated and created content takes pressure off the content team to constantly create something new, especially in a market where it's difficult to come up with completely fresh and unique material. It also allows the content team to spend more time and resources on the brand's created content.

Curating content in the age of social media is standard practice if you give proper credit to the authors. Trusted curators can amass a large following because they provide the valuable service of condensing a lot of digital noise into a few hand-picked pieces. Even without creating your own content, curation can help you become an opinion leader and key influencer.

Although it can be faster and easier than creating your own content, curation takes time, diligence, and care. You have to find the best sources and consult a really wide variety of resources, as well.

Technology can help you with curation and creation. Listening to online conversations, by following them on social media, researching Twitter hashtags, or doing general social listening, can give you a great idea of where to start.

Twitter lists are curated groups of Twitter accounts. Consult the following website and create your own: help.twitter.com/en/using-twitter/twitter-lists.

Google Alerts is a tool that helps you check for internet activity around certain keywords or search terms. You can find their guide here: wikihow.com/Use-Google-Alerts.

Even when you're sharing other people's content, make sure you include your own take on it. Your followers need a reason to be following you rather than the source of the content. Don't be afraid to take a stand and add your own insights.

Hootsuite has put together The Complete Guide to Content Curation to make sure that you're curating content ethically in 2022 that you can find here: blog.hootsuite.com/beginners-guide-to-content-curation/.

10.7.3 Channel planning

A channel is the place where your content will be published. This can include, among others:

- Email newsletters
- Social media (which includes all social media platforms, from Facebook and YouTube to Pinterest, TikTok, and Google+)
- Your website
- Blogs.

Social media is one of the most important channels to consider since it takes up a huge amount of people's overall time online. Most consumers expect brands to be active on around three social media platforms, with Facebook topping the list.

Each social media platform appeals to a different audience and is capable of different forms of content delivery. You need to make sure you select the right platform for you. Think about who uses each platform and whether it fits in with your objectives. Research to find

> **NOTE**
> Read more on social media preferences by generation here: sproutsocial.com/insights/guides/social-media-use-by-generation/.

out where your target audience is. Remember, you need to go to them rather than expecting them to come to you. Get to know your audience; you should know that Gen Z or Zoomers are extremely online. Zoomers use social media to learn about new brands, whereas 73% of Baby Boomers use it to stay connected with family and friends (Sproutsocial, n.d.).
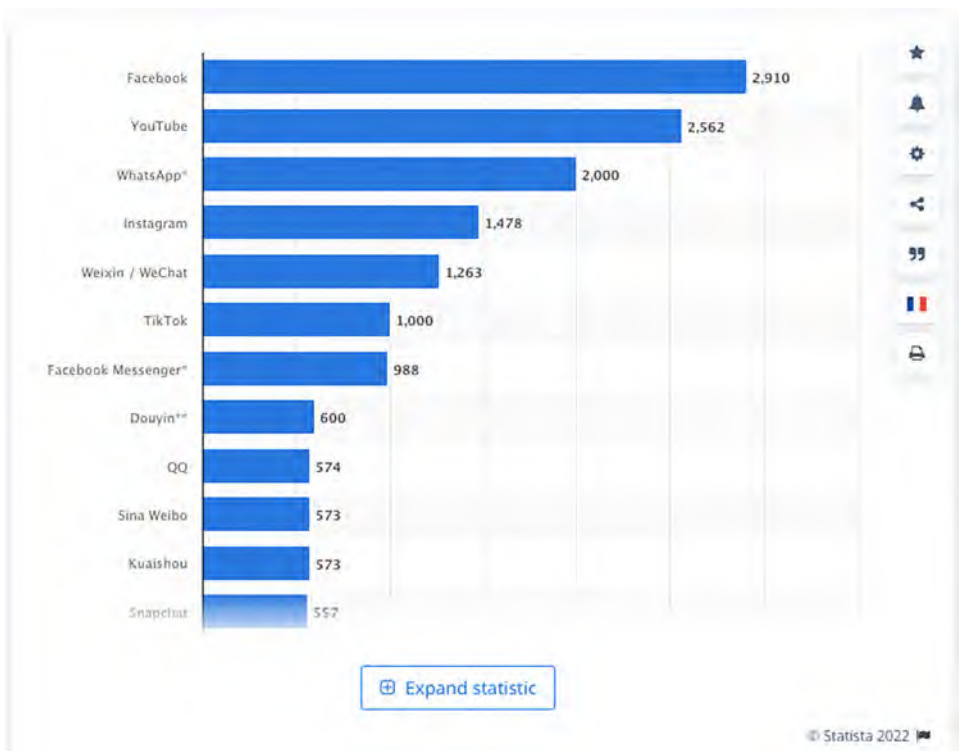
Figure 10.9 The global most popular social network in 2022

You might find that the organic community that forms around your brand on a social platform is not your intended audience, so you'll have to think carefully about how to appeal to your target users. People use social for many reasons, and it appeals to a variety of personality types. You'll probably want to target different types of social media users. Consider who you're looking to attract, and remember that this will have an impact on the kind of content you create.

You'll also need to consider which channels and platforms your competitors are using. Is it worth being present on the same ones? Do they have an audience similar to yours? Is their presence on each channel successful?

Consumers will experience your story across a range of channels, both digital and offline, and you need to remember that as you set up your content.

> **NOTE**
>
> Warning! We've discussed channels separately here, but you should not start your content planning with a channel and work your way back. Instead, you need to pick the channels (plural) that work well for the content that you want to create.

Platform or channel

Begin with which platform or channel the post is being written for, while considering post frequency. Post often enough to keep your customers interested, but not so often that you

annoy them. Some research shows that for smaller businesses, posting more often means a higher number of overall clicks, but reduced engagement per post.
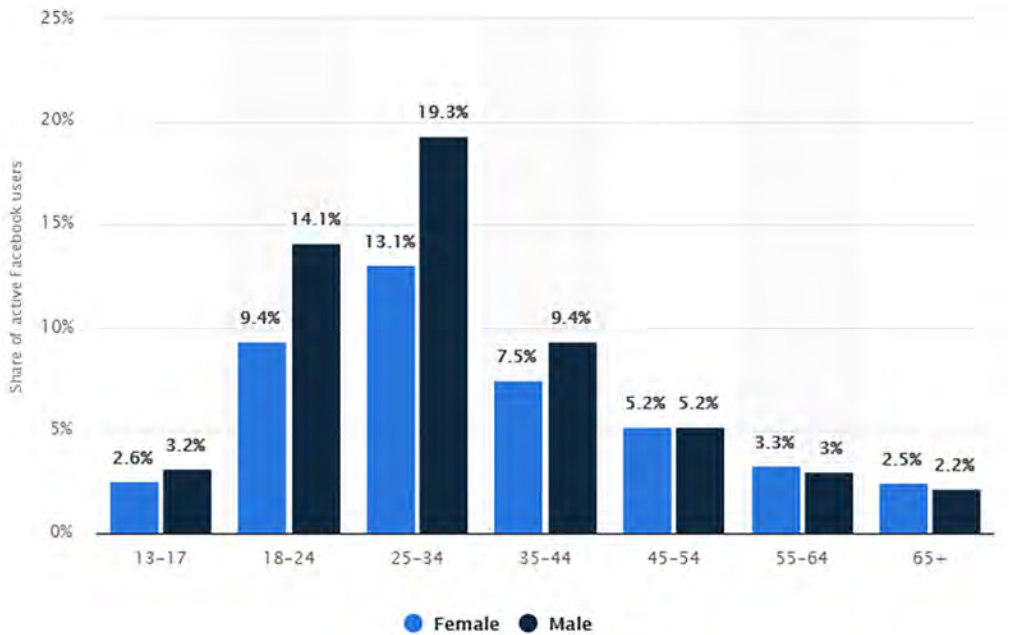
Figure 10.10 Different age groups prefer different social media networks, but Facebook is popular across generations

You will need to test to see which frequency works best to maximise engagement for your brand. Remember that the ideal frequency will vary by platform. The following posting frequencies are a good place to start:

- **Facebook:** 2 posts daily
- **Twitter:** 5 or more posts daily
- **Pinterest:** 5 posts daily
- **LinkedIn:** 1 post daily
- **Instagram:** 1 post daily.

> **NOTE**
> Buffer Social gives some more detail in their article: buffer.com/library/how-often-post-social-media/.

With blogs or email newsletters, be less frequent. Email newsletters in particular can annoy customers if they arrive too often.

Date and time scheduling

Once you know how often you want to post, you also need to decide which days and times are important to post on. Again, this will vary according to your content, live campaigns, and audience. You should test to see what works best.

> **NOTE**
> Want stats and suggestions for the best time and day to post? Check out this article: blog.hubspot.com/marketing/best-times-post-pin-tweet-social-media-infographic.

Post copy

Here you will write out the actual copy that will form the content post. Remember the limitations of each channel and platform, like word or character count. For social media, tag other brand profiles referenced in your post by adding the brand handle and including the @ sign. You could even include the list of hashtags you'd like to include for Twitter, Instagram, and Facebook. If your post includes a link (URL) alongside your copy and an image, use a customised link shortening tool like bitly.com to make the link destination clear to your audience. For blog posts and email newsletters, hyperlink anchor text so that the link destination is clear.

Image reference

Different social media platforms use different image sizes, so indicate the necessary size of your desired image.

Include an idea of what kind of image or video you want to use as a guideline for the designer to create, or a direct link to the image or video itself.

> **NOTE**
> Check out Hubspot's guide to social media image sizes here: blog.hubspot.com/marketing/ultimate-guide-social-media-image-dimensions-infographic.

10.8 APPROACH

Now that you know which channels you want to use, you can't just jump in and start posting. You need to know what kind of approach you're going to take. There is no definitive approach to content marketing. Let's look at a few models, though sometimes contradictory, so that you have some idea of how to apply, merge, and adapt them to your brand.

10.8.1 Stock vs. flow content

Stock content is your brand's permanent, timeless, and often expensive content. This is usually created with high production values, made to last and to represent the fundamental qualities and values of your brand. This might include an 'About us' video, a prospectus, or a brochure. This content populates websites and offline marketing materials.

Flow content is the fun, quick, and disposable content that the brand creates. It tends to be cheap to create and is intended to be timely and shareable so that the brand can produce it regularly. The content shared on social media, blogs, and email newsletters is usually flow content, which can include short text posts, photos, and low-production-level videos.

Flow content can move at different speeds, depending on the medium. Twitter and Facebook posts, for example, generally become obsolete in a matter of minutes, while a blog article can be shared and relevant for a week or more.

If you're not sure whether a piece of content is stock or flow, simply consider whether it will still be relevant a year, two years, or even ten years from now. If it will be, it's probably stock.

Look for the difference between direct brand promotion and contextual content. If it's based on current events, competitions, user-generated content, or short-term how-tos, it's probably flow.

10.8.2 Always-on vs. flighted

A flighted marketing campaign is a specific, once-off marketing push to promote a specific product, special, or deal. Someone who sells flowers will probably have a Valentine's Day-themed campaign in early February. Flighted campaigns carry a specific message and are time-bound. They end after the objective has been achieved.

Always-on content is not built around a specific product or promotion but is rather the general, regular content the brand posts online, including social media, blogging, and email newsletters.

> **NOTE**
> dennysdiner.com has an excellent always-on content plan that engages its followers in a way that appeals to them.

As a content marketer, you have three options for how to allocate your content marketing budget:

1. Always-on or continuous content
2. Flighted content
3. A mix of both, also known as pulse content.

In digital, you will find that a mix of both is probably the most effective, which means always-on content punctuated by strong, customer-focused campaigns. The always-on

> **NOTE**
> onedayonly.co.za has some great pulse content for you to check out.

content keeps customers engaged and maintains your share of voice in between your bigger marketing pushes, keeping general engagement higher and reducing the intensity of the dips. Refer to Figure 9.7.

10.8.3 Tactical marketing

Tactical marketing (also known as real-time marketing) is challenging, but it can be a worthwhile content approach if you can devote the time and resources to getting it right. Tactical marketing means creating real-time content around events, trends, and memes that are currently happening to take advantage of the buzz.

Great real-time content should be:

• **Relevant:** Trends change fast; don't miss the moment. Make sure your trends are relevant to your audience, as well.
• **Insightful:** You need to add something to the discussion or add some kind of value, even just humour, rather than take advantage of it.
• **Tasteful:** The content you create needs to be sensitive to the trend you're capitalising on.

South African fast-food brand Nando's, for example, often uses current news to guide its content:

Figure 10.11 Tactical content created by Nando's, one referencing forced blackouts due to an error by Eskom, South Africa's electricity provider, the other referencing a politician swearing in Parliament

10.9 MEASURING YOUR CONTENT

It is impossible to know whether or not your content is achieving the objectives you've set out without measuring its performance. Measuring content performance against your goals will help you decide what works and what needs to change. We cover some of the most effective ways to measure content in this section.

10.9.1 Objectives and KPIs

In general, the objectives and KPIs of the content plan will be specific to each business and are derived from your marketing plan. As a standard, when it comes to your content strategy, you need to know what you want to achieve to measure the following:

- Audience reach through views, page visitors, and time spent on the platform
- Audience engagement and activity, including likes, comments, shares, and conversation
- The number of leads reached and generated (sign-ups and/or sales).

Let's examine this in a bit more detail.

10.9.2 KPIs and metrics

Whereas KPIs measure progress toward specific goals, metrics relate to the performance of your content.

KPIs

A key performance indicator (KPI) is a metric that you use to see whether your tactics are meeting your objectives. Deciding which KPI is important for each objective will help you focus on what matters to a campaign.

KPIs answer the question: "What data do we need to look at to see if goals are being completed?"

KPIs are determined per tactic with an eye on the objective.

The goals for our website traffic campaign were:

*   Arrive on the website (this is the most important one!)
*   Spend at least 2 minutes on the website
*   Click/act on a CTA.

What do we look at to see if it's achieving these goals? What are our most important metrics? Overall, we would want to look at:

*   Number of website visitors
*   Average time on site
*   Number of conversions (clicks on a given CTA).

We also want to look at metrics specific to the tactics we're using, though, as long as those are also relevant to the objective we've chosen. So we may want to consider:

*   Content marketing
    *   Most frequently visited page (to indicate which content is most successful)
    *   Time spent on specific pages
*   Social media (with paid promotion)
    *   Reach
    *   Shares
    *   Clicks to website
    *   Cost per click or cost per mille (CPM – cost per thousand views)
*   SEO
    *   SEO ranking.

Note that none of these are about how many people liked or commented on the posts or how many followers we have. There's an important difference between vanity or ego, metrics, and performance metrics. A vanity metric might make you feel good about the content you posted, but it doesn't really have any impact on ROI. A performance metric is how you establish

whether your content marketing is effective. While the exact figures have changed since this was published, the Content Marketing Institute's annual study underlines this difference.

Metrics

A metric is something measurable that relates to the performance of your content. To measure in line with your business objectives, it is important to start by setting clear goals. Once you've completed your content audit, you will be able to set specific, measurable, achievable, relevant, and time-based (SMART) objectives for your content. Semrush.com published the Essential Content Metrics to Track in 2021 that provides a guide to measure and analyse content performance for success:

SEMRUSH

Essential Content Metrics to Track in 2021

1. User behavior

PAGEVIEWS
The total number of times a particular page on your website was visited. Lets you understand what kind of topics attract the most attention from your audience.

USERS
The total number of people who visited your website during a set period of time. Allows you to estimate the size of your audience.

NEW AND RETURNING USERS
The ratio between new and returning visitors. Proves your content's potential to retain the existing audience and attract the new one.

AVERAGE TIME ON PAGE
Relative interest readers demonstrate in your content and their willingness to read on.

BOUNCE RATE
The percentage of all sessions on your website where users visited only one page or triggered only a single request to the server.

PAGES PER SESSION
The average number of pages viewed during a session on your website. Lets you ensure the interlinking is done correctly.

TRAFFIC SOURCES
The sources that bring traffic to the specific page. Lets you find the ideal content distribution channels.

2. Engagement

UPVOTES/LIKES AND SHARES
Indicate if your content is interesting enough to inspire the reader's to praise or tell others about it on social media.

COMMENTS
Show whether your content motivates the reader to express their own opinion on the subject or engage in a discussion.

MENTIONS
Quotes and referrals to your content from various sources with or without links. Let you gauge your online reputation.

RE-PUBLICATIONS
The value of your content for bloggers and other media expressed as a partial or full copying.

INCOMING REQUESTS
Invitations to write new material, to give an interview, to share your knowledge base. Demonstrates the ability of your content to create partnership opportunities.

Figure 10.12 Content metrics to track in 2021

These metrics show you the different ways to view and measure how your content is performing. Each essential metric groups key factors that you will use to monitor and track how your audience is connecting with your brand:

- **User behaviour:** Measuring how your users are engaging with your platforms can help you understand which pages attract them to your site in the first place, and which pages they interact with the most. This is also how Google measures your brand's relevance. You can understand your users' behaviour through statistics that tell you the number of page views, users, new and returning visitors, average time on pages, bounce rates, pages viewed per session, and sources of traffic.
- **Engagement:** These metrics show how your content is connecting with your users. Often considered the most important measurement for effectiveness, engagement considers upvotes, likes, and shares that show how popular your content is. Shares and comments also contribute to your online brand reputation – they should be managed closely to ensure it contributes positively to your brand, rather than ruin your reputation.
- **SEO outcome:** Metrics like organic traffic, dwell time, backlinks, and keyword rankings are important activities to track because, not only do they show where your users are located and how many found your web page using a search engine, they also measure how long

users spend on your web page, links that point to your web page and the quality of the domains, as well as how your web page ranks in keyword search.

*   **Company revenue:** Content that is relevant and engaging for the audience leads to traffic to your website and enables you to generate revenue. Although content does not necessarily translate to financial metrics and sales, the activities that you should track to measure ROI include conversion rates, nurturing existing leads of users who interact with your web page, the number of new leads who sign up, and Cost Per Acquisition that will show how much you have spent to acquire a new lead.

These are only a few of the essential metrics to measure your content performance. As you can see, there is a lot to view as far as your content and audience are concerned. To ensure you stay on track with what you set out to achieve, you should choose the ones that you want to focus on.

10.9.3 Targets

Once you have decided on an objective, tactics, and KPIs, it's time to set targets. Targets are the specific, measurable values that the KPIs need to reach for the objective to be achieved. For our chosen objective, we want to reach 1200 website visitors per week by the end of this marketing effort. That means our most important KPI, number of website visitors, is very easy to assign a target to:

*   **Number of website visitors:** 1200 per week.

We also know how long we want people on site:

*   **Average time on site:** 2 minutes.

The other KPIs may have flexible targets based on historical performance, current performance, and recency of content. You can always change targets as you go. For now, let's set our targets like this:

*   **Number of conversions:** 60 per week
*   **Reach on Facebook:** 1000 people per week
*   **SEO ranking:** Top three in Google search engine results pages (SERPS).

How do we decide which numbers to aim for with our targets?

10.9.4 Benchmarks

A benchmark is a standard point of reference against which you can compare your own marketing achievements. The Content Marketing Institute report includes some benchmarks, and Hubspot has a wealth of marketing statistics.

> **NOTE**
>
> Read more on benchmarks here: contentmarketinginstitute.com/wp-content/uploads/2019/12/2020_B2C_Research_Final.pdf and here: www.hubspot.com/marketing-statistics.

You should examine industry benchmarks to get some idea of how your business is performing. Make sure to look at your specific industry, since benchmarks can vary widely.

However, what you really want to do is benchmark against your own past performance and your competitors, where available. Look at what kind of targets your content has met in the past, and see if you can exceed those. You can also look at the performance of your competitors and benchmark against that.

Remember, this whole process should be iterative. If your tactics aren't helping you reach your objectives, change them. If your KPIs aren't helping you measure your success, change them.

10.9.5 Tracking

You can't just decide on KPIs and targets and then wander off into the wilds of content marketing, never to think about them again. Nor can you post your content and then ignore it completely. Instead, you need to track your content carefully – the way people react to it and what kind of responses it encourages – so that you can assess how well it's working and adjust accordingly.

For a thorough look at your content's performance, you may well need to use multiple tools for different views:

• Google Analytics is a free tool that can tell you a lot about how people act on your website and how people arriving from different sources perform in comparison to each other.
• Most social media platforms have their own analytics tool, like Facebook Insights or Twitter Analytics.
• Email providers can give you information about how content emails are received.

10.9.6 Engagement vs. influence

Why is it so important to track performance metrics over vanity metrics? Engagement with your content is great, and you can use it to learn a lot about your target audience, which can make it valuable as a research tool. However, it doesn't prove that your content can exert any kind of influence over your consumers. For that, you need to look at performance metrics.

It's tempting to fall into the vanity metrics trap, but now you know enough to avoid doing it!

10.10 CONTENT DISTRIBUTION AND AMPLIFICATION

Writing the best content in the world means nothing if you don't put it out in the world and make sure people can get to it. Content distribution involves selecting the right channels for a given content piece, and amplification is about using the right methods to increase its reach.

There are many ways to get your content out there. You need to consider the distribution channel right from the start. The content you produce will all be affected by limitations, like character restrictions, and practical considerations about what works best where and when.

Remember, you shouldn't launch into the first half-dozen channels you come across. Choosing the right one is a careful, research-focused process.

We're going to outline some possible channels below. This is not an exhaustive list, but it does indicate the kind of channels available.

To help you understand them better, we've divided them into owned, earned, and paid channels. Owned channels are ones the brand controls completely; earned are those where the brand has worked to build a community (the most important, for most brands); and paid are the ones where the brand pays a fee to list or promote content.

Owned channels service customers, providing information and services. Paid channels are best suited to communicate with new prospects, aiming at awareness, excitement, and reach. Earned channels speak to fans who may or may not be customers of the brand and draw them in with relevant, valuable ongoing content strategies.

> **NOTE**
>
> Read this article on the pros and cons of owned, earned, and paid channels: referralrock.com/blog/paid-owned-earned-media.

Not all channels fit neatly into one group. In fact, many share characteristics of several. For example, on Facebook, brands create their own brand pages (owned) where they converse with fans (earned) and drive traffic with targeted social ads (paid).

PAID MEDIA
Traditional advertising - print, television, radio, display, direct mail, paid search, retail/channel

GENERAL CONSUMERS

OWNED MEDIA
Corporate web site, campaign microsite, blog, brand community, Facebook fan page, mobile, etc.

CUSTOMERS

EARNED MEDIA
Referral, Facebook comments, Twitter (@mentions, @replies), Vine, Blogs, forums, review sites
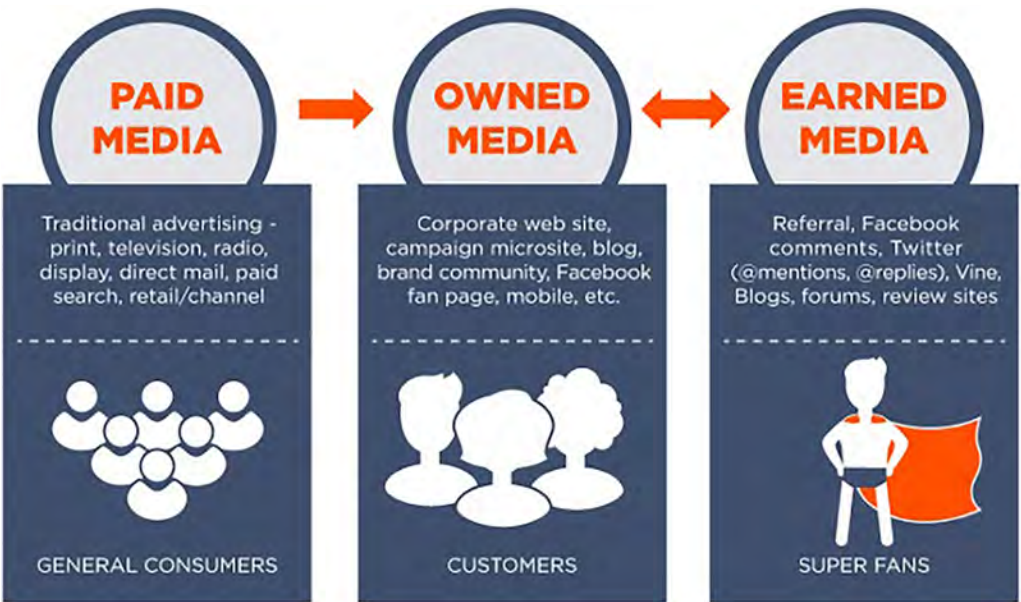
SUPER FANS

Figure 10.13 Paid, earned, and owned media interaction

10.11 CASE STUDY: AIRBNB

Airbnb is an American company that runs an online marketplace for lodging, homestays for short-term and long stay rentals, and tourism activities. Based in San Francisco, California, the platform is globally accessible via website and mobile app, facilitating professional and safe transactions between hosts and guests for accommodation space.

One-line summary

The business has two primary target audiences – hosts and guests. To successfully build a sound online reputation and value-driven platform to attract and retain their target audiences, Airbnb needed a solid content strategy to shape the product experiences.

The problem

A year after it was founded, Airbnb almost lost it all when they realised that they needed to improve the quality of their listings. With their focus on travellers and hosts, they needed to attract more people to their platform across the globe. They needed to increase their reach using content that would satisfy all travel needs.

The solution

More than the business decision to create value around their offering, as designers, the founders understood the importance of content strategy and planning to guide their customer experiences. As part of their strategy, they designed Neigborhoods, a guide to help travellers decide where to stay, what experiences they will gain, and what places their neighbourhood would have. Neighborhoods was published on their website and mobile app. The guide included recommendations about food, stays, and nearby destinations for every type of traveller!

The results

- 10,000+ estimated monthly organic traffic
- 100+ referring domains.

Airbnb prioritised the importance of offering customised content focused on the specific needs of their customers. This helped increase their brand credibility and engagement.

(Source: MBA Knowledge Base)

10.12 CASE STUDY QUESTIONS

1. What did Airbnb need to understand before creating their content strategy?
2. Why do you think Airbnb achieved the outcomes that they did by implementing their strategy?
3. Do you think Airbnb would have been as successful if they did not adopt this content strategy?

10.13 THE BIGGER PICTURE

Creating a strong piece of content or a content campaign takes a lot of research and planning, and a strong understanding of your brand and audience. You need to understand your brand strategy, create a content marketing strategy, and work to reach very clear SMART objectives.

Fortunately, with a careful content audit and content map, you should quickly be able to identify gaps in your brand's content. You can use this knowledge when you create your content plan and content calendar so that you know you're putting in effort when it's really needed.

Right from the start, of course, you need to know which content distribution channels you plan to use so that you can create content accordingly, rather than trying to fit it into the channel plan later on.

By now, you understand that truly successful content planning is about more than just tweeting or posting on Instagram at random. It's about strategy, planning, and executing in a way that is relevant, consistent, and appealing to your customer.

10.14 CHAPTER QUESTIONS

1. What is content planning and how does it differ from content strategy?
2. Why is it important to conduct content research and a content audit? What value does it bring?
3. How do you determine the best way to reach your customer with your content?

10.15 FURTHER READING

blog.hubspot.com/marketing/content-marketing-metrics – Not sure where to start when choosing KPIs for content marketing? Read Hubspot's article 7 Content Marketing metrics to Consider for Continued Success

contentmarketinginstitute.com/2021/10/b2b-power-content-marketing-research/ – This article from the Content Marketing Institute will give you an excellent idea of how brands are approaching content marketing

semrush.com/blog/category/content/content-strategy/ – For tips on how to start and develop your content strategy, have a look at the Semrush blog on content strategy

10.16 REFERENCES

Content Marketing Institute, 2020. Content Marketing 2020: Benchmarks, Budgets, and trends. [Online]
Available at: contentmarketinginstitute.com/wp-content/uploads/2019/12/2020_B2C_Research_Final.pdf
[Accessed 25 May 2022]

Lee, K., n.d. How to Schedule Social Media Content for Next Week, Next Month, and Next Year. [Online]
Available at: buffer.com/library/schedule-social-media-content-plan/
[Accessed 30 May 2022]

MBA Knowledge Base, n.d. Case Study: Airbnb's Growth Strategy Using Digital Marketing. [Online]
Available at: www.mbaknol.com/management-case-studies/case-study-airbnbs-growth-strategy-using-digital-marketing/
[Accessed 25 May 2022]

Mosley, M., 2022. Paid Media, Owned Media, Earned Media: Examples and Tips To Succeed With Each. [Online]
Available at: referralrock.com/blog/paid-owned-earned-media/
[Accessed 30 May 2022]

Phillips, M., n.d. Content Strategy at Airbnb. [Online]
Available at: airbnb.design/content-strategy-at-airbnb/
[Accessed 2 March 2022]

10.17 FIGURE ACKNOWLEDGEMENTS

Figure 10.2: Screenshot, Coco-Cola's Twitter page

Figure 10.5: smartinsights.com/content-management/content-marketing-strategy/the-content-marketing-matrix-new-infographic/

Figure 10.6: Screenshot, Hootsuite, 2022 datareportal.com/reports/digital-2021-global-overview-report

Figure 10.7: Screenshot, Hubspot, 2022 www.clickz.com/6-useful-ways-to-refresh-content-marketing-strategy/hubspot-sample-content-calendar/

Figure 10.8: Screenshot, Content Marketing Institute

Figure 10.9: RMobile Marketing, 2022 www.rmobilemarketing.com/statistics

Figure 10.10: Screenshot, Hootsuite, 2022 blog.hootsuite.com/social-media-demographics/

Figure 10.11: Screenshot, Nando's advert, 2010; Screenshot, Nando's advert, on Twitter, 2014 twitter.com/lean3jvv/status/443993958881198080

Figure 10.12: Screenshot, Semrush, 2022 www.semrush.com/blog/measure-your-digital-content-performance/

Figure 10.13: Screenshot, Gigiriver, 2022 digiriver.weebly.com/blog/importance-of-content-marketing-in-digital-marketing-strategy

Airbnb logo: airbnb.co.za

11

CONTENT CREATION: COPY

In this chapter, you will learn:

- About the principles of writing for your online audiences
- About the types of digital copy that are available to you
- About the basics of HTML to format online text
- How to write for search engine optimisation (SEO), focusing specifically on keywords
- About the best practices for successful online copywriting.

11.1 INTRODUCTION

Online copy is a hardworking multi-tasker. It must provide information to visitors, engage with them, and convince them to take a desired action, while conveying brand ethos. It also has to provide context and relevance to search engines. It needs to achieve all this without seeming as if the author is trying too hard to push a particular outcome.

You will see in this chapter that writing for digital is different from writing for more traditional media. Because of the sheer volume of information on the internet, quality content

> **NOTE**
>
> Read more about this in **Chapter 9: Content marketing strategy**.

is king. Many people argue that content is one of the most significant determining factors of success for your online campaigns. This is not surprising if you consider that it is one of the most direct lines of communication with your consumers. Therefore, you will see many links between this chapter and **Chapter 9: Content marketing strategy**.

Online or digital writing involves everything from the text on a website to the subject line of an email and all things in between. From PR articles of 800 words to four-line search adverts, if it's being read on a screen, no matter the size of that screen, from desktop computer to mobile phone, it's online copy. Writing for digital does not mean the traditional rules of writing need to be abandoned. By and large, the foundations remain the same.

11.2 KEY TERMS AND CONCEPTS

Table 11.1

Term	Description
Above the fold	The content that appears on a screen without a user having to scroll.
Active verb	A word that conveys action or behaviour, and, in a call to action, tells a reader what to do.
Audience	The group of people at which a marketing communication is targeted.
Benefit	The positive outcome for a user that a feature provides.
Call to action (CTA)	A phrase written to motivate the reader to take action such as 'sign up for our newsletter' or 'book car hire today'.
Dynamic keyword insertion	In paid search advertising, this allows keywords used in searches to be inserted automatically into advert copy.
Feature	A prominent aspect of a product that is beneficial to users.

HyperText Markup Language (HTML)	Code used to structure the information and features within a web page.
Keyword stuffing	The process of intentionally putting too many keywords into the metadata of the website or using many irrelevant keywords. Search engines can penalise websites using this practice.
Mass customisation	Tailoring content for many individuals. Metadata information that can be entered about a web page and the elements on it in order to provide context and relevant information to search engines.
Persona	A character created to define a group of readers in order to speak to them as though they were a unique reader, creating the feeling of a one-on-one conversation.
Paid search advertising	Usually refers to advertising on search engines, sometimes called PPC advertising. The advertiser pays only for each click of the advert.
Sender alias	The name that is chosen to appear in the sender or 'from' field of an email.
Search engine optimisation (SEO)	The process of improving website rankings on search engine results pages.
Search engine results page (SERP)	The actual results returned to the user based on their search query.
Tone of voice	The register, formality, and personality that comes through in the text.
Unique selling point (USP)	The aspect that makes your offering different from that of your competitors.
Urchin Tracking Module (UTM)	A simple code that can be attached to a custom URL to track a source, medium, and campaign name that tells you where searchers came from and which campaign directed them to you. If copywriters are required to add links to SEO articles or social media posts, they will need to UTM the links before shortening them.

11.3 CORE PRINCIPLES

There are a few things you need to take into account when creating written content for digital marketing platforms. For effective content creation, it is important that you familiarise yourself with the core principles that we unpack here.

11.3.1 Writing for an audience

Knowing your audience is vital if you want to write effective content for digital platforms. It guides your content strategy, determines the topics they are interested in, and helps you organise information in a way that makes sense to them. It directs how you express your copy for your audience.

Focus on writing your online content in active voice to convey your message clearly and concisely. When communicating online, avoid making your sentences too wordy because it can affect the meaning and cause confusion. Try to keep your message straightforward and to the point.

Step one of writing for digital is to ensure you have researched your audience and understand what they want. Once you have a clear idea about this, you can figure out how to fulfil those needs using your copy. *Smashing Magazine* (2015) recommends answering the following five questions:

1. Who are you writing for?
2. What is the main message you want to get across?
3. Where does the action take place (where will it be read)?
4. When is it relevant?
5. Why is it important (what's the goal)?

For example, your answers might look like this:

Who: First-time moms
Message: Our baby kit can help you
Where: Parenting forums/magazines/social media
When: Immediately before and after the birth of a child
Why: Because first-time moms need help (and because we want them to buy our product).

When researching your audience, there are two useful concepts to bear in mind, the audience of one and personas.

11.3.2 The audience of one

According to Price and Price, audiences were traditionally thought of as a vast and vaguely defined crowd (Price & Price, 2002). Because the web provides a voice to individuals and niche groups, the concept of this mass audience is disintegrating.

Price and Price (2002) go on to argue that the internet has led to an audience of one. What does this mean? While your audience is not literally one person (and if it is, thank your mum for reading your copy, but spend some time growing your readership), it is not a vast, vaguely defined crowd either. Instead, the web has many niche audiences who are used to being addressed as individuals. Indeed, The Economist Group (2015) confirms that personalised marketing is becoming more granular, helping to create specialised customer experiences that will keep them coming back.

The individual that you have in mind when you are writing could also be called a persona.

Take the time to think about how your digital content is consumed in the physical world. It's usually an exclusive action, so write your copy this way.

11.3.3 Personas

A persona is a profile that a writer creates to embody the characteristics of the target audience for whom they are writing.

Personas are based on the profile of readers of your copy. Creating a profile is all about considering the characteristics of your readers and their needs and desires. When you are building this profile, there are a number of things that you should consider about your audience:

- What gender identity do they identify with?
- How old are they?
- What are their other demographics and psychographics?

Once you understand these simple characteristics, you can ask yourself some more in-depth questions. If you are selling something, questions could include:

- How do they make purchasing decisions?
- Do they compare many service providers before selecting one?
- Do they make lists of questions and call in for assistance with decision making, or do they make purchase decisions spontaneously based on a special offer?

Understanding the reader profiles of your readers is an important process and the best copy usually results from extensive time spent figuring out your audience.

Tailoring your copy to your audience does not necessarily limit you to one persona.

Digital copy can be structured so that it caters to several personas. Your various marketing channels may have different audiences, so ensure that you have a persona for each main platform you use. Spend time understanding their needs before you write copy that addresses these personas.

11.3.4 Types of online copy

The purpose of content is to communicate a message, whether it is long or short. Communication implies that the message has been both received and understood. The considerations covered here are aimed at ensuring that when you distribute a message, it is communicated effectively to the people you want to receive it.

Content written for digital platforms can be divided into two broad categories, short copy and long copy. This division is in no way scientific.

Name	Jack Smith	Jane Rogers	James Bond	David Watkins
Age	Young-30	Young-30	Young-33	Senior-55
Industry	IT	Marketing	Banking	Medical
Personality	Extroverted	Introverted	Extroverted?	Introverted?
Technology Use	Technical enthusiast	Technical minimalist	Technical enthusiast	Technical minimalist
Meeting Goals – 1	Capture essentials	Systematic Pattern	Capture essentials	Systematic pattern
Meeting Goals – 2	Brainstorm	Contribute and make status reports	Present Solutions	Coordinate and make status reports
Needs	Store on-going sketches	Attend multiple connected meetings	Get information from Missed Meetings	Effective meeting facilitating and note-taking
Preferred Notes Format	Whiteboard notes	Audio notes	Consolidated Notes w/ Handouts & Slides	All types of notes
Note Sharing?	YES	YES	YES	YES
Other Desires	Search Audio Notes	Playback of Audio Notes for Context	Enhanced Teleconferencing	Custom Configuration of Software

Figure 11.1 A sample of several personas

Short copy

Online, writers often have very little time and space to get a message across to a visitor, and to entice them to take action. This is especially true of banner and search adverts but is also important across all digital marketing disciplines. The most important short copy anywhere is probably the call to action.

Call to action

Users scan web pages and look for clues on what to do. Any time there is an action you want a reader to take, a CTA should instruct them what to do. A call to action is a short, descriptive instruction that explicitly tells a reader what to do, for example, 'Click here' or, 'Buy this now'. Use active verbs when you write, and craft hyperlinks to be clear instructions that resonate with your visitors at each step in the conversion process.
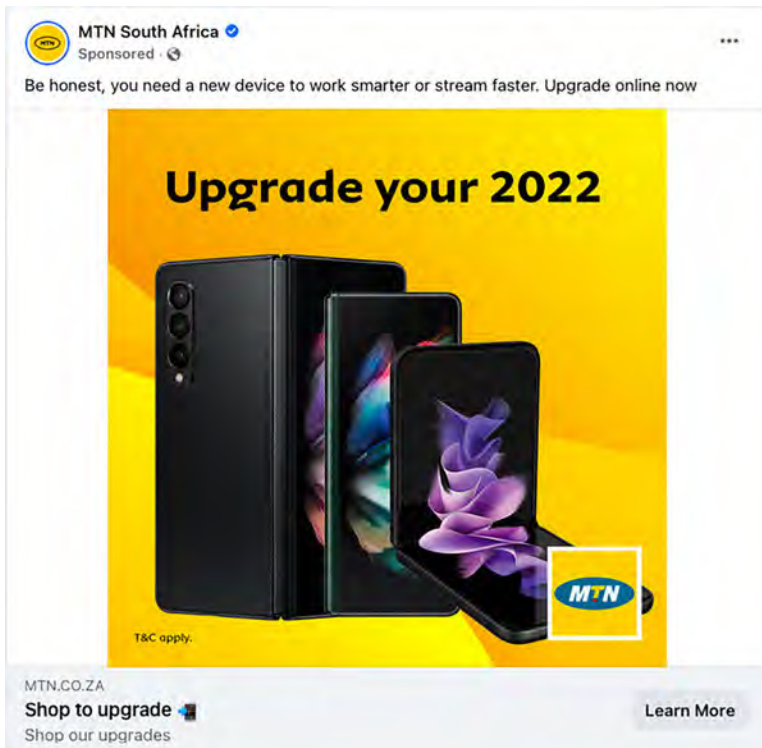

Figure 11.2 Screenshot of a Facebook social ad by MTN

In paid social media ads, CTA buttons are already built in when setting up the advert copy. You will notice these on your social feed because 'Sponsored' will appear directly beneath the page name, as shown in Figure 11.2 above.

In other instances, it's important to know where to place your call to action so that it makes sense to a reader's eye. For example, depending on the structure of your page, it might be better to start with your CTA and then to qualify it. In other cases, ending the page with your CTA may have a stronger impact on the reader as they may be more likely to act once they have the information they need to do so. This depends on your product and the action you want your audience to take.

Banner advertising involves clear calls to action, and they can also be used in social media posts, search adverts, and content marketing. Call to action copy is not limited to short copy.

Email newsletters and promotions should also make use of calls to action. We even see them all over web pages. Each piece of online copy should be written with a CTA or at least with the question, "What's next?" in mind.
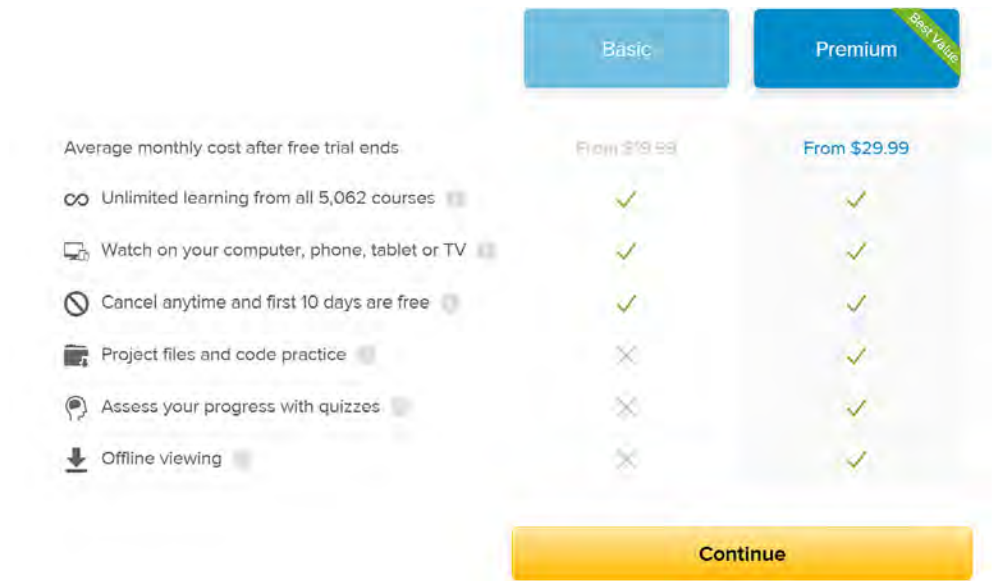

Figure 11.3 CTAs should be clear and enticing

A good call to action resonates with the action the users need to take, as opposed to the technical function that will be performed. For example, if a user has entered an email address to sign up for your email newsletter, the action button should say 'Sign up' rather than 'Submit'. Be sure to write your instructions for humans. Always think about what real people prefer to read and how they will benefit from their action. In this instance, the CTA does not need to read 'Sign up'. It could also read 'Stay in touch', 'Count me in', or similar, to make the reader feel like they need to be included for fear of missing out.

Also consider what actions mean offline. For an email newsletter, 'Sign up' can have very different connotations from 'Subscribe'. Furthermore, 'Subscribe' is very different from 'Subscribe for free'.

Whereas subscriptions have connotations of costs, 'Sign up' does not carry the same burden. However, 'Subscribe for free' could imply greater value as something that would normally carry a cost is available to you for free. All CTAs have a designated purpose. In marketing, CTAs help a business convert a reader or visitor into a lead for the sales team.

NOTE

Since the call to action is key to converting customers, this is an important element to test. What iterations of your main call to action could you try?
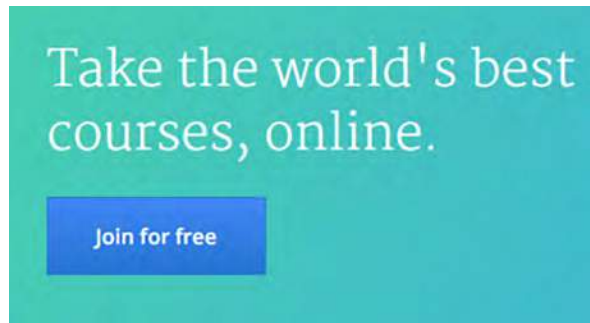
Figure 11.4 A Coursera CTA. Good CTAs are short and to the point

Titles and subject lines

Titles and subject lines often form part of a body of long copy. However, they are important enough to be discussed as stand-alone short copy. Titles and subject lines are there for a very important reason since they tell a reader whether or not they should read further. They are the gateway to your content.

> **NOTE**
>
> *The Huffington Post* is well known for publishing articles with compelling headlines. Visit www.huffingtonpost.com to have a look at how they grab the reader's attention.

Consider the following titles:

- Guide to online copywriting
- Ten steps to online copywriting that sells.

The second title conveys more information and is more compelling because it communicates the direct benefit to the reader. It shows the reader value in the piece to encourage the decision to read further.

Subject lines are like headlines for emails, and can make the difference between an email being deleted instantly and being opened and read. As with a headline, which should be carefully crafted like the headline of a newspaper, use the subject line to make it clear

> **NOTE**
>
> An email subject line is the first cue your audience receives to help them decide whether to open an email or not. How can you make it count?

what the email is about. For example, if there is a promotion in the email, consider putting it in the subject line as well.

Figure 11.5 A direct, enticing email subject line

Titles, headlines, and subject lines need to be both persuasive and enticing. Consider what need your copy is meeting for your readers, and express that first. Highlighting a benefit to your readers upfront means they are more likely to engage, even if they don't necessarily need your product or service at the time.

Search adverts

Search adverts have very limited space and time to get a message across and there is plenty of competition for a reader's attention. These few lines of copy need to work hard to ensure a top return on investment.

> **NOTE**
> Read more about this in **Chapter 18: Search advertising.**

Search adverts typically follow the same basic structure and have strict character limits for each line.

It can seem daunting to communicate information that entices the right people to click through, and also differentiates you from your competition with a limited character count. Testing variations of copy is the best way to determine what works best for your campaign. While content writers are not generally responsible for writing paid search ads, they are often brand custodians and should review all copy representing a brand.

Ad extensions

An ad extension is simply an extension of your ad. It offers more information on your business, service, or product that can add value to your target audience. Some of the benefits of using ad extensions are maximising text on your ad, like including your location or contact number that gives browsers the necessary details to act. It also allows you to add your key messaging to attract the right audience.

Ad · https://www.grandiflora.co.za/ ▾   011 610 1108

The Decor Coffee Shop For You - Heart Warming Coffee Shop
The Flower Cup **Coffee** Shop Is Just the Place for You! Visit Us While You Do Some Shopping! Our **Coffee** Shop Is a Great Place to Relax and Enjoy a Cup. See What's on the...
Coffee shop created · Address · Contact Us · FAQ's · Grandiflora

Figure 11.6 An example of a Google Ad extension

There are several ad extensions to choose from, including sitelinks, callout extensions, and snippets. Including an additional sitelink to your ad will direct browsers to the page that you want them to visit, while a callout extension offers you the opportunity to highlight special keywords that get you to stand out from your competitors, such as 'Limited Edition', or 'Convenient location', or 'Free delivery'. A snippet extension, however, gets into the specifics of your offer and may include details that you know your audience will buy, such as special product features or benefits.

Social copy

Social media allows brands to have conversations with their customers and fans. It's an opportunity to engage and connect meaningfully with your audiences, which is why it's important to write your copy like your customers speak.

Using some colloquialisms and jargon that your customers will understand is one way of personalising your message. If your brand is targeting audiences from different parts of the world, continent, or country, adopting language localisation in your social copy will allow you to get closer to customers in the targeted regions. Remember, you want your audience to feel like your brand understands their pain points, challenges, and needs.

Social conversations give consumers a powerful voice and the ability to tell brands what they want. There are a few considerations to keep in mind when creating content for social media:

- **Do your research:** Understand what type of content community members want. Meaningful and relevant content is more likely to be shared. Hashtags are fairly important for many platforms. Research any hashtags you use to avoid making costly mistakes, like DiGiorno did with its use of the #WhyIStayed hashtag. This hashtag was part of an awareness campaign for domestic abuse and was used in tweets explaining why users had chosen to stay in abusive relationships.

Figure 11.7 DiGiorno research fail

- **Remember that it's a conversation:** Be personable and appealing. Use personality and convey the humanity of your brand in order to generate conversation and encourage comments.
- **Write shareable content:** Offer value and be insightful. Ultimately, you should aim to create an overall perception that your brand is the thought leader in its industry. Shareable content is credible content.

- **Avoid overly promotional content:** Think about how your content can be used. Community members are likely to see right through a sales pitch. Remember, with content, value to the reader should come first, with value to the brand as a secondary consideration.
- **Implement a solid communication protocol:** Create internal guidelines for organisations to follow on how they use and communicate on social media platforms. This also ensures consistency, which is very important for creating a brand personality for readers to engage with.

> **NOTE**
>
> All of these points are covered in more detail in **Chapter 13: Social media** and **Chapter 14: Social media strategy**.

Figure 11.8 Relevant and on-brand social media copy

Long copy

Online content writing is not just about short, sharp calls to action and attention-grabbing headlines and adverts. It also covers longer pieces of content.

Longer copy has advantages. Primarily, it allows you to provide more information and encourage the reader to convert. You can foster a relationship with a reader, whether it is on a blog, through email communications, or through articles and news releases. With more words and space available, you are able to build a voice and a personality into your writing.

The expression 'long copy' is somewhat misleading. As online readers behave slightly differently from offline readers, it is unlikely that a skilled writer will be called on to create copy for the web that is longer than 800 or 1000 words per page, although, there are exceptions to this.

Long copy needs to be structured and formatted so that it's easy for attention-starved web readers to digest. Web users tend to scan pages quickly to determine whether or not they will read further. Specifically in longer copy, you need to take this into consideration.

There are many types of long online copy – including website copy! Here, we will focus on a few that are useful for marketing, such as news releases, articles for online syndication, emails, blog posts, advertorials, and websites.

Bear in mind that this is by no means an exhaustive list.

News releases

News releases are a staple of public relations. As the internet grows, so does the overlap between PR and marketing. Therefore, many content writers are called upon to write news releases for online distribution as this is a standardised format for releasing information. Originally intended to provide information for journalists, news releases are increasingly being read by users bypassing the journalists. This means that they should be written in the brand tone, be accessible to the general public, and be optimised and formatted according to the principles of good online writing (more on those later). Also remember to focus on a compelling headline to win over your reader.

Figure 11.9 An online press release from Apple

Emails

Email as a channel is an integral part of many online marketing strategies. Of course, content is a huge part of this; it comprises the words in an email with which a user engages.

> **NOTE**
> Read more about this in **Chapter 16: Direct marketing: Email and mobile.**

Emails are the ideal medium for communicating and building relationships with your consumers. This customer relationship marketing helps to increase retention. Successful email campaigns provide value to their readers. This value may vary from campaign to campaign. Newsletters can offer humour and entertainment, research and insight, information and advice, as well as promotions and special offers.
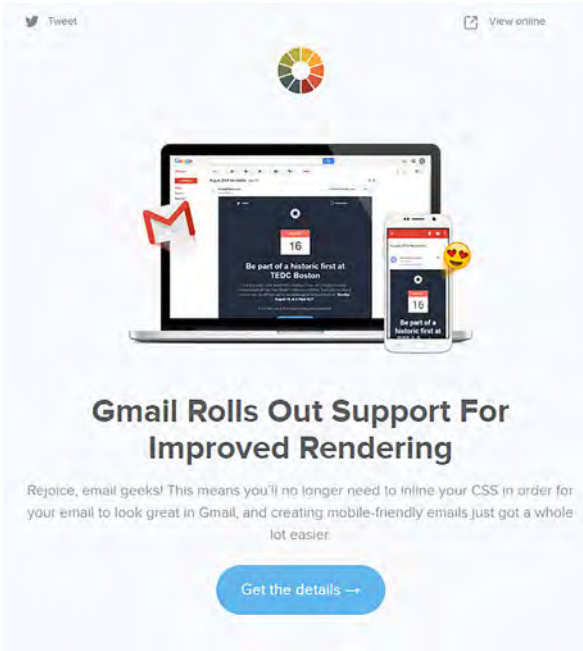
Figure 11.10 The Litmus updates newsletter

Figure 11.11 A blog post on the Fast Company blog

Blogging

Blogs can be very successful marketing tools. They're an excellent way to communicate with staff, investors, industry members, journalists, and prospective customers. Blogging also

helps to foster a community around a brand and provides an opportunity to garner immediate feedback. This is an audience made up of players vital to the success of a company, which is why it is important to get blogging right. The quality of your headlines is a key consideration. You have to convince your reader to grant you their attention.

There is plenty to be gained from the process of blogging and obviously, the value, as with email marketing, lies in the content. This communication channel provides an opportunity for you to foster an online identity for your brand and gives your company a voice and a personality. This happens through the content you distribute, as well as the tone you use to converse with your readers. There is more information on blogging in **Chapter 17: Social media advertising**.

11.3.5 Website copy

Website copy is a type of long copy. Therefore, the principles that apply to long copy in general also hold true for websites. Digital copywriters need to structure content effectively so that users want to engage with the site and read on. This is especially important when people access a site from their mobile phone, where the small screen size drastically reduces the content users will see before they scroll. Some ways to create digital copy that is usable and appropriate for an online audience include:

- Writing text that can be easily scanned
- Using meaningful headings and sub-headings
- Highlighting or bolding key phrases and words
- Using bulleted lists
- Maintaining a well-organised site.

It is important to take these other considerations into account:

- **Limiting each paragraph to one main idea or topic:** The leading sentence should give a clear indication of what the paragraph is about. Readers can scan each paragraph without missing any essential information.
- **Cutting the fluff:** Get rid of meaningless turns of phrase and words that unnecessarily bulk up copy.
- **Removing redundancies:** These often creep into writing by accident, but you should work to eliminate them in order to get to the point.
- **Including multimedia wherever relevant:** Some readers may be more partial to video than reading, for example, see nytimes.com/projects/2012/snow-fall/#/?part=tunnel-creek.

11.3.6 Writing in the mobile age

Content is usually written for mobile first these days. More than 4 billion people access the internet using smart phones or mobile devices, according to a statistic released by Statista

> **NOTE**
> Read more about this in **Chapter 19: Online and display advertising.**

(Ceci, 2022). Understanding how the user experiences a product, system, or service, as well

as their perceptions of utility, ease of use, and efficiency is important when writing for mobile. Here are some points on creating digital copy for all screen sizes that encourages interaction and achieves marketing and business goals:

- **Get to the point:** With limited screen space, there really is no room for wordy text. You need to determine exactly what your message is and get to the point quickly! This is particularly true for content above the fold.
- **Put the important bits upfront:** This includes contact information and navigation links. Word these clearly so that people know what action to take.
- **Condense information to its simplest form:** Ensure that it still makes sense and is grammatically sound.
- **Use a call to action upfront:** Mobile web users are goal-oriented. Therefore, provide them with the next step early on.
- **Make use of headings and subheadings:** Breaking up the copy with headings and sub-headings allows the reader to scan before committing to the full read of the text.

> **NOTE**
> Once users have decided to navigate further into your mobile website, you can increase the amount of copy on the pages.

11.4. IMPLEMENTING WRITING FOR DIGITAL

Apart from the information already covered, writing good copy involves a number of points and best practices that you should keep in mind.

11.4.1 HTML for formatting

HTML stands for HyperText Markup Language, and it's the foundation of documents on the web. HTML formatting is a process of formatting text for better look and feel. They allow you the ability to format text without using CSS. They tell browsers how to present content. HTML tags are written in brackets that look like arrows < >.

Basic HTML is not difficult to use, and will help you format your content. Here are some basic HTML tags:

To bold: phrase you want to bold
To italicise: <i>phrase you want to italicise</i>
To underline: <u>phrase you want to underline</u>
To list: lines you want to list
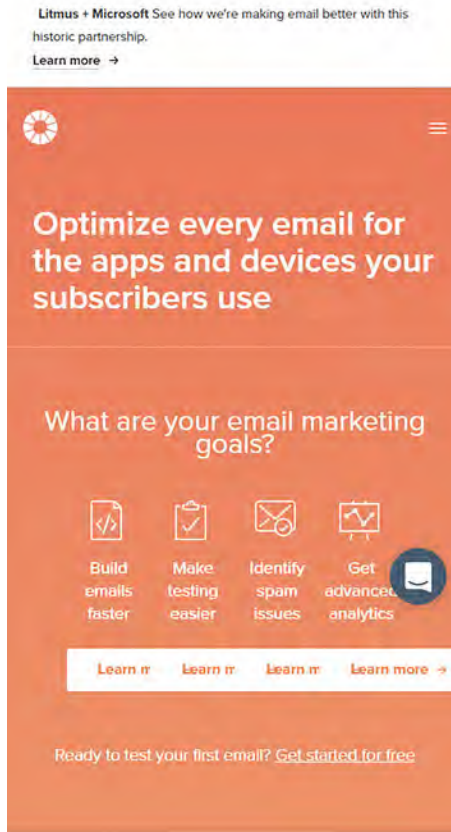**To create a paragraph:** <p>paragraph text</p>
To insert a line break:
To insert a link: phrase you want to link
To insert a heading: <h1>Level one heading</h1>
To insert a subheading: <h2>Level two heading</h2>

Figure 11.12 Mobile-optimised copy

A good digital content writer will also be able to use basic HTML to lay out copy knowing that the appearance of the page will get their words read. It should be easy for users to skip and skim the copy, and it should be easy for them to find the parts that are most relevant to them.

When writing online copy, you can use an HTML editor where you insert the tags yourself or a 'What You See Is What You Get' (WYSIWYG) editor, which works in a similar way to a word processor.

The tags also help search engines to identify how the content has been laid out on the page.

The best way to get to grips with HTML is to start using it online, where you can see first-hand how the tags work.

> **NOTE**
> Right click on any web page and click 'view source'. Can you find the paragraph tab <p>?

11.4.2 SEO copywriting

A good online copywriter will have a thorough understanding of SEO and how this can be integrated into their writing. Key phrases can be used in long and short copy alike, to great effect.

Optimising for human and machine users

One of the most notable differences between writing for print and writing for digital is that when it comes to the latter, you are writing not only for an audience, but also for the search

> **NOTE**
> Read more about this in **Chapter 21: Conversion optimisation.**

engines. While your human audience should always be your first priority, your copy also needs to speak to the search engines in a language they can understand. This digital tactic is covered in greater depth in **Chapter 21: Conversion optimisation**.

Optimising your copy for search engines is important because your target audience is most likely to be using a search engine to find the products or services you are offering.

If the search engine is not aware that your content can give users the answers they are looking for on a particular subject, it won't send traffic to your website.

Optimising your content for search is the process of telling search engines what content you are publishing. Keywords, key phrases, and themed pages are an integral part of this. Google is becoming increasingly semantically aware and can recognise synonyms, so repeatedly using specific keywords is no longer important; instead, good SEO copy focuses a page around particular themes, using keywords relevant to those themes.

SEO copywriters need to know how to blend keywords into their content and how to use them in conjunction with text formatting and metadata. In addition to assisting you with structuring your content, these tags indicate relevance and context to search engines. Some of the tags are used by screen readers, and so they assist visitors with technical limitations to access your content. The meta description can also be used by search engines on the search engine results pages (SERPs).

Key phrases

A keyword refers to a single word used in a search query, while a key phrase refers to more than one word used in the search query.

> **NOTE**
> Read more about this in **Chapter 21: Conversion optimisation.**

Key phrase research is an important element of digital copywriting. It is covered in detail in the discussion on SEO in Chapter 21. Having identified the themes of your web pages, keyword research should be used to identify what phrases your target audience use when searching for you. It is important to know what people are searching for, so that you can provide what they need.

Once you have a good idea of the words people are using to find information online (online tools exist and can guide you), you can create pages themed around the use of these phrases and their synonyms. A good copywriter is able to develop these themed pages and use keywords/synonyms seamlessly, so that the reader cannot detect that they have been included.

Key phrases can be integrated into nearly every type of content that you write for the web. Below are a few places where Red & Yellow tends to include key phrases and synonyms on our website.

Page title

The page title appears at the top of a user's browser and should be able to tell the user (and the search engine spiders, of course) what the main theme of the page is. The page title is usually limited to under 60 characters, including spaces. The key phrase should be used as close to the beginning of the title as possible, followed by the name of the company or website.

Page URL

The main key phrase for the page should be used whenever possible in the URL for the page. If you are using a blogging tool or content management system (CMS), the URL is generated from the page title, so using the key phrase in the page title should ensure that it is in the URL as well.
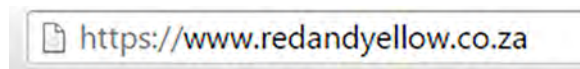
Figure 11.13 The Red & Yellow School homepage URL

Meta description

The meta description is a short paragraph describing the page content. This summary is usually shown on the SERPs if it contains the search term, which means that it needs to entice users to click through with a strong

> NOTE
>
> Every page on a website must have a unique URL, page title, and meta description.

CTA. The spiders use the meta description to deduce the topic of the page, so using targeted key phrases is important here. Copy should generally be between 150 and 160 characters, including spaces.

Figure 11.14 Example of a meta description

Meta titles

Meta titles should be less than 60 characters and need to include a keyword. Adding spacers that are low in character use help to keep titles short. Example: Freshly Baked Goods & Custom Cakes | Primrose Bakery.

Meta keywords

Meta keywords are the list of the words and phrases that are important on a web page. Using targeted key phrases is important, but remember, no keyword stuffing! The meta keywords are limited to 200 characters, including spaces. This is, however, no longer a major source of information used by search engines, though it certainly doesn't hurt to include these.

Headings and subheadings

Spiders assign more relevance to the text used in headings, so it is important to use your key phrases in the headings on your page. It also helps you to structure your content. Headings are created with HTML tags.

Heading structures are set out like this:

- **<h1> Main page headings**
  - **<h2> Sub-headings**
  - **<h3> Information under the sub-headings**

Figure 11.15 Heading structures

Having a good heading hierarchy is important as spiders use it to move through your page and understand its relevance to the search query; it also helps human readers to scan your page.

On-page copy

For on-page copy, remember that you will be optimising for a theme rather than for a set key phrase. This means you want to use relevant synonyms, as well as your keywords, without being overt about it – they should not stand out too much.

For SEO effectiveness, a page of web copy should be at least 250 words long. On this page, use keywords and synonyms that fit the theme as and when required.

The page should not be so long that the user needs to scroll continuously to get to the end of it. If you find the page is getting exceptionally long, consider breaking it into different web pages

for different sections. In this way, you could add several pages of optimised copy focused on one theme instead of one very long page. This will benefit your reader if they are looking for something that is particular to the shorter page.

Links to your optimised page

The text used to link from one page to another is considered important by search engine spiders, so try to ensure that your key phrase is used when linking to the optimised page. The anchor text of links should include the key phrase of the page being linked to, and not the page being linked from.

> **NOTE**
>
> When submitting promotional copy to other sites that includes links back to your own website, which phrases would be most important to include in this link text?
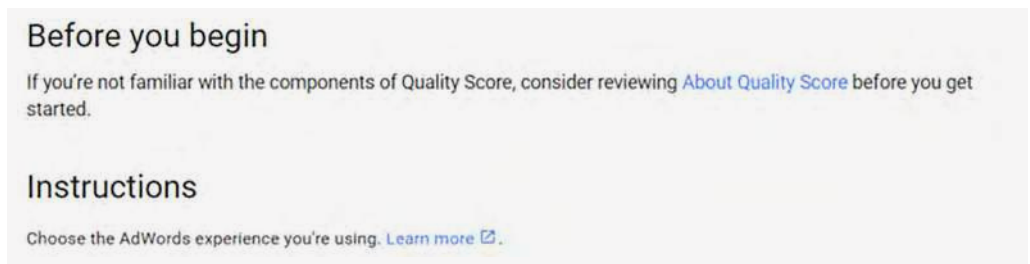

Before you begin

If you're not familiar with the components of Quality Score, consider reviewing About Quality Score before you get started.

Instructions

Choose the AdWords experience you're using. Learn more ☑.

Figure 11.16 Links on a Google Support page dealing with Google Quality Score

Images: Alt text and title tags

Alt text refers to the 'alt' attribute for the <img> HTML tag: this is the text that appears in the caption. It is used in HTML to attribute text to an image on a web page, normally to describe what an image is about and display text in instances where the image is unable to load. While this is handy for humans and aids accessibility, it is also used for another reason; namely, search engine spiders can't read images, but they can read the alt text. The image title tag shows when you hover with your mouse over an image, depending on your browser, and can be read by the search engine spider. This will help users find your images on Google's Image Search, which can be helpful in driving traffic to your page.

11.4.3 Best practices for online copywriting

Now that we have covered the basic theoretical principles of writing for digital, we need to look at the best practices to apply whenever you are writing copy for publication on the web. There are several things that you need to consider:

1. Does your copy convey a creative idea?
2. Does the layout of your copy make it easier to read?
3. Is your meaning clear and direct?
4. Does the copy convey the features and benefits necessary to make your point (if applicable)?

5. Will your readers clearly understand the content of your writing?
6. Is the content of your message structured in a logical manner for desktop and/or mobile reading?

The rest of this chapter will be dedicated to ensuring that you have the knowledge and tools to answer these questions.

Conceptual copywriting

Most of the points in this chapter have focused on the practicalities of writing online copy, such as getting information across and encouraging user actions and engagement.

Copy should also be creative, beautiful, and thought provoking.

Your copy should express an idea that grips readers. Conceptual copywriting is about making an idea memorable merely by using words to express it. The idea is central, and the words are the vehicles that convey it. Clever wording, smart ideas, and thoughtful copy should make the reader pause, think, and want to engage more deeply with your idea.

While images are often used to express powerful ideas, words can be just as effective. Consider this famous example, which demonstrates how a small change in the copy can radically affect one's perception of an idea:

A woman without her man is nothing.

A woman: without her, man is nothing.

Writing conceptually means conveying a brand message in a creative way to make an emotive connection with a specific audience. It's all about bringing a big idea or concept to life.

Layout and legibility

As we have mentioned already, readers process content differently online from the way that they read offline. On the web, readers tend to scan text rather than read every word.

As a result, online copy is judged at a glance by its layout, not just on content. It needs to look as if it's easy to read before a user will choose to read it.

Digital copy should be easy to scan. This means using clear and concise headings, bulleted and numbered lists, short paragraphs, bold and italics, and descriptive links.

It's easy to see this in practice.

Before	After
Tea has been drunk for thousands of years, and as people are growing more health conscious, tea sales are increasing.	Worldwide, **tea sales are increasing** as people are becoming more health conscious. Here are some tips for making the **perfect sup of tea**:

Personal preference plays an important role in making the perfect cup of tea. However, using fresh water ensures maximum oxygen in the tea, and warming the teapot first is standard practice. Tradition dictates one teabag per person, and one for the pot. Tea is served with milk, lemon, honey, or sugar, according to taste.	▪ **Use fresh water (for maximum oxygen)** ▪ **Warm the teapot first** ▪ **Use one bag per person, and one for the pot.** The perfect cup of tea is based on **personal preference and taste**. Tea can be served with: ▪ **Milk or lemon** ▪ **Honey or sugar**

Figure 11.17 Before and after layout editing

Language

The basic principles of good writing apply online, but because your audience's attention is limited and often divided, it is best to keep it simple and tailor your language to your audience.

Tone: The tone of your content should be consistent with the brand for which you are writing. Brands will often have full tone-of-voice documentation. If they don't, read some of the brand material to get a feel for the company's style of communication. Compare the difference in tone in the examples below.

Example of Tone A: Investec

Whether you are an individual, a business, or an intermediary acting for clients, our aim is to create and manage your wealth. Investec provides Private Banking and Wealth & Investment services for every stage of your journey.

Investec's strategic goals and objectives are based on the aspiration to be recognised as a distinctive bank and wealth manager. This distinction is embodied in their entrepreneurial culture, which is balanced by a strong risk management discipline, client-centric approach, and an ability to be nimble, flexible, and innovative (Investec, 2022).

Example of Tone B: Nando's

The story of Nando's starts hundreds of years ago with the first Portuguese explorers who set sail for the East in search of the legendary spice route.

Lured by the promises of our beautiful continent, they came ashore and there, under our famous sun, they discovered the African Bird's Eye Chilli or as we know it (and love it), PERi-PERi. Unique in its properties, they used it to create a one-of-a-kind sauce that ignited the fires of passion inside them.

A few centuries later, in 1987, it was the same PERi-PERi sauce that inspired Fernando Duarte to invite his buddy Robbie Brozin to a small Portuguese eatery in Rosettenville, South Africa, to try some PERi-PERi marinated chicken. In his own words, "I knew nothing about the food business. I just knew that it was the best chicken I had ever tasted" (Nando's, 2016).

Active voice: Grammatically speaking, people expect characters to execute actions that have an impact on objects or other characters.

For example: The girl ate a chocolate.

* The girl is the subject.
* Eating is the action.
* The chocolate is the object that is affected by the action.

This is known as the active voice. Unfortunately, writers often use the passive voice. This turns the object into the subject, forcing the reader to think more carefully about the sentence. For example: The chocolate was eaten by the girl. The human brain automatically translates this into the format that it expects. When writing for the web, it is better to use the active voice.

Neologisms and buzzwords: Sometimes the World Wide Web is referred to as the Wild Wild Web, as it is an environment where anything goes. The ever-growing numbers of social media participants, for example, habitually play fast and loose with grammar.

With new services and products being developed daily, it can feel as if the list of new words, and their uses, is growing faster than you can keep up with. Dictionaries and reference guides celebrate this regularly with a 'word of the year', usually one that has been in heavy use on the internet for the three years preceding its entry into a dictionary.

For example, in 2021 the Oxford English Dictionary voted 'vax' the word of the year to reflect the global COVID-19 pandemic which 'injected itself into the bloodstream of the English language in 2021' (Oxford Dictionaries, 2021).

Online services can quickly become verbs in everyday language, so we say 'Googling something' instead of 'searching on Google', and 'Facebooking someone' instead of connecting on Facebook'. Bing is still trying desperately to work its way into everyday conversation in this way.

Always remember you are writing for your users so talk in the same way that they talk. If your content is aimed at cutting-edge early adopters, then pepper it with the latest buzzwords. If your audience does not know the difference between Chrome, Microsoft Edge, and Safari, then be cautious when using a word that did not exist the day before.

Features and benefits: Writing compelling copy means conveying to readers why they should perform an action. While features may seem all-important, you need to communicate the benefits of the features to the user.

Communicate the benefits in a way that makes the user think about the product's role in their life. Write so that they imagine actually owning the product.

* **Feature:** A prominent aspect of a product or service that can provide benefit to users. It describes what the product does.
* **Benefit:** The positive outcome for a user that a feature provides. It can be the emotional component of what the user gets out of the product.

Why would your audience want to buy your product or service? Put aside the features for a moment; what will compel your audience to buy on an emotional level? How does it address their wants and needs?

For example, consider a home entertainment system. Features could include surround sound and a large, flat-screen television. The benefit is a cinema-quality experience in your own home.

Features and benefits are very different. Features are important to the company that provides the product or service. Benefits are important to those who decide to use the product or service.

Persuasive writing makes use of features, benefits, and active verbs to create appealing messages for your personas:

Enjoy cinema-quality movie nights in your own home with a surround-sound home entertainment system.

Logic

The structure of online copy can be compared closely to the structure of a newspaper article. The headline, usually containing the most important bit of information in a story, comes first. Online, visitors decide quickly whether or not to read a page. As a result, the most important information needs to be at the top.

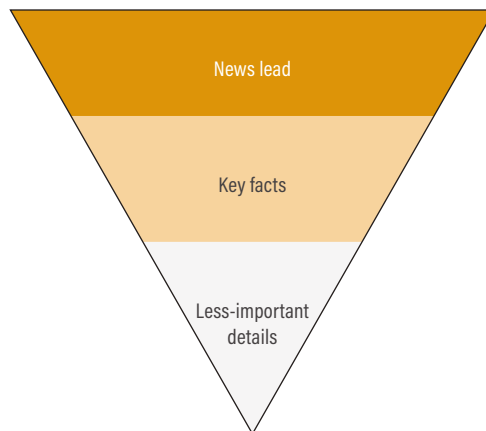Start with the news lead which is the main idea of the article.

Figure 11.18 Information hierarchy

While clever word play in headings can attract some attention, these need to be written in line with the objective you want to achieve. The copy is multitasking; not only is it informing visitors of what to expect, it is also telling search engine spiders what the page is about.

11.5 ADVANTAGES AND CHALLENGES

The advantages of good digital copywriting are simple, your content will work better, your SEO will benefit, and your customers will find it easier to absorb your material. Clear calls to actions can also help to increase response rates.

However, some challenges do exist. The primary challenge is learning what, exactly, good copy is. This is important because bad content can really turn off your customer. Meeting SEO requirements without being spammy can be tricky, and you need a clear set of writing guidelines for your organisation to follow.

11.6 MEASURING SUCCESS

Measuring copywriting performance is important. How else will you know what is and is not working?

Brands often use conversions as the primary way to measure success. If your copy doesn't convert, what's the point? The goals that you measure will depend on the goals of your copy. If you want to boost subscribers to your newsletter or blog, then the number of subscribers will be your measure of success. If you want to increase sales, then the number of sales will be your measure. Because digital copywriting applies to almost every aspect of digital marketing, you can only measure its success if you have a clear idea of your goals.

However, copy isn't always just about converting. You can also use impressions, time on page, and bounce rate to see whether your copy is keeping people interested and on-site.

11.7 TOOLS OF THE TRADE

The Simple Measure of Gobbledygook (SMOG) formula from Harry McLaughlin can be used to calculate the reading level of copy that you have written. A SMOG calculator, and instructions for use, can be found on here: readabilityformulas.com/free-readability-formula-tests.php.

Sprout Social has also published a social media character counter to test the length of your posts before posting. Take a look at their guidelines here: sproutsocial.com/insights/social-media-character-counter/.

For an online dictionary and an online thesaurus, you can visit dictionary.com and thesaurus.com.

When it comes to keyword research, there are a host of tools available. Have a look at the tools suggested in the chapter on SEO. Grammarly is a good one. Visit grammarly.com.

> **NOTE**
> Read more about this in **Chapter 5: Search engine optimisation**.

11.8 CASE STUDY: YELP

Yelp is an American company that publish crowd-sourced reviews about businesses.

One-line summary

A Yelp salesperson tripled her B2B email marketing response rate by personalising and humanising email copy.

The problem

Yelp's sales email templates were dry and unengaging. They failed to consider the audience to whom they were writing, as well as features and benefits. This caused a disconnect between the brand and its audience. The emails made the salesforce sound, "Like a bunch of robots ... with no personality" (Medhora, 2015).

The solution

One Yelp salesperson tested a number of more personalised emails and came up with a formula that increased response rates considerably. She focused on showing that she was a real person and on building a sense of urgency, and looked like this:

Feature + Benefit + Value + Human Factor = Email more likely to earn a response

For example, for the feature, she would link to a business's Yelp pages. The benefit would be a description of how the business could grow through Yelp. The value would be indicating how many leads the business had found through Yelp, and the human factor involved casual subject lines and the use of emojis. The subject line for the email below was "Re: Yelp Email Per Your Request – A Response Would Be Appreciated ☺."

Figure 11.19 A personalised Yelp email and its response

The salesperson ran a few experiments to measure the success rates of personalised emails against Yelp template emails, added some important factors to consider – how the copy attracted attention, ignited interest and desire, and encouraged action – and then made sure that the email was interesting as well. She also tested a number of headlines, or subject lines, to see which had the best response rates.

The results

- Her response rate rose from 3.33% to 11.43% (even if some were negative)
- She learned some important lessons about how personalising your copy, thinking about features vs. benefits, and writing for an audience of one can improve responses.

11.9 CASE STUDY QUESTIONS

1. Why would bad copy in emails prevent users from signing up with Yelp, which aims to help businesses grow?
2. Why do you think the more targeted copy performed better than the more generic copy?
3. Identify the writing for digital principles (including audience considerations) that improved the response rate for the Yelp emails.

11.10 THE BIGGER PICTURE

It should be clear by now that online content touches every other digital marketing tactic. After all, they all need to communicate messages in text format, whether that's a CTA button on a website, a video description, or a long-form press release written for digital PR purposes. While content marketing strategy may tell you what content to create, knowing how to create it comes down to great online writing skills.

Writing for digital overlaps strongly with SEO, since copy is the basis of all web optimisation as search engines can't read images, videos, or other rich media content. It also overlaps with UX, since making a website easy to navigate involves ensuring that your copy matches user needs.

11.11 CHAPTER SUMMARY

Online copy is the foundation of a website. It is constantly in view and is usually the focal point of a page. Good online copy can also make the difference between a site attracting regular traffic and becoming stagnant.

First and foremost, your writing needs to have the reader in mind. The copy should be strong, clear, and easily readable (remember the principles of scannability, including bullet points, bolding, short paragraphs, and headings), while still making maximum use of key phrases.

11.12 CHAPTER QUESTIONS

1. Why is it important to write for an 'audience of one'?
2. Why should users dictate your content? List some ways that users' needs determine content.
3. What are some ways to make web copy easy to read, and why is it important to do so?
4. For some real, online copywriting practice, choose an article in a magazine or newspaper and rewrite it for an ínternet audience.

11.13 FURTHER READING

medium.com/the-book-mechanic/how-to-write-digital-copy-332bc8b4e980 – To get started on writing for digital, read an article published on Medium.com by Dan Brotzel, How to Write Digital Copy: A Complete Guide

www.copyblogger.com – It has regular articles and case studies on writing online copy that converts.

www.palgrave.com/gp/book/9780230613881 – Another excellent resource is The Idea Writers: Copywriting in a New Media and Marketing Era

11.14 REFERENCES

Ceci, L., 2022. Mobile internet usage worldwide - statistics & facts. [Online]
Available at: www.statista.com/topics/779/mobile-internet/
[Accessed 26 May 2022]

Investec, 2022. [Online]
Available at: www.investec.com/en_za/welcome-to-investec/about-us.html
Accessed 4 March 2022]

Medhora, N., 2015. How I tripled Yelp's email response rates with just 3 changes. [Online]
Available at: kopywritingkourse.com/b2b-email-marketing-tips-from-yelp
[Accessed 4 March 2022]

Mesibov, M., 2015. How Copywriting Can Benefit from User Research. [Online]
Available at: www.smashingmagazine.com/2015/07/how-copywriting-can-benefit-from-user-research
[Accessed 4 March 2022]

Nando's, n.d. Where the Fire Began. [Online]
Available at: www.nandos.co.za/explore/the-story-of-peri-peri
[Accessed 4 March 2022]

Oxford Dictionaries, 2022. Word of the Year 2021. [Online]
Available at: languages.oup.com/word-of-the-year/2021/
[Accessed 4 March 2022]

Smashing Magazine, 2015. A Field Guide To User Research (Smashing eBooks).

Wikipedia, 2022. History of Blogging. [Online]
Available at: en.wikipedia.org/wiki/History_of_blogging
[Accessed 4 March 2022]

11.15 FIGURE ACKNOWLEDGEMENTS

Figure 11.1: Screenshot, personas

Figure 11.2: Screenshot, MTN's Facebook social ad, 2022

Figure 11.3: Screenshot, Lynda.com, 2016

Figure 11.4: Screenshot, Coursera, 2016

Figure 11.5: Screenshot, email

Figure 11.6: Screenshot, Google Ad extension

Figure 11.7: Screenshot, DiGiorno's Twitter page, n.d.

Figure 11.8: Claire's digital marketing blog, 2016

Figure 11.9: Apple, 2016

Figure 11.10: Screenshot, Litmus newsletter, n.d.

Figure 11.11: Screenshot, Fast company Blog, 2016

Figure 11.12: Screenshot, mobile-optimised copy from Litmus

Figure 11.14: Screenshot, Google search, 2017

Figure 11.16: Screenshot, Google support for Adwords, 2017

Figure 11.18: Stokes, 2013

Figure 11.19: Kopywriting Kourse, 2015

Yelp logo: yelp.com

12

CONTENT CREATION: VIDEO

In this chapter, you will learn:

- Why video marketing is such a powerful, versatile, and effective marketing channel online
- How successful online videos are produced, step-by-step
- About paid, earned and owned methods of promoting your online video.

12.1 INTRODUCTION

Video is considered the 'go-to' form of communication. It offers a rich, engaging, and stimulating experience for viewers. With the increased availability of bandwidth and improvements in video technology, people have started watching and sharing videos on a scale never seen before, and it is increasing every year. From music videos to funny clips of animals to reviews, how-tos, video streaming, and movie trailers, users are turning to video for entertainment, information, and education.

As a result of the global Covid-19 pandemic, people are watching more videos online than ever before, and the amount of online video that people watch has almost doubled since 2018.

According to Statista (2022), the most popular forms of online video content are:

- Music videos (51.4% of users)
- Comedy, meme, or viral videos (37.1%)
- Tutorial or how-to videos (31.3%)
- Video live stream (30.4%).

Google remains the world's largest desktop search engine, with a 92% global market share (Statcounter, 2022). The second most popular website by total visits is YouTube, the online video-sharing and social media platform. YouTube boasts over 2.1 billion unique users (Statista, 2022). This indicates that users are turning to YouTube with precise, intent-driven behaviour; they're not just browsing randomly or waiting for a link to land in their inbox.

Understanding how to create and optimise videos for search is an important part of any digital strategy since more and more people are using search engines to find video content.

Every day, about 1 billion hours of video are watched on YouTube, more than half of which come from mobile devices. Every minute, 500 hours of video are uploaded (Statista, 2020). Other social media sites are getting in on the video action as well. More than 4 billion video views happen on Facebook every day (Hootsuite, 2022).

The introduction of live video streaming websites, applications, and software that allows users to broadcast live videos, such as YouTube Live, Twitter Live, Facebook Live and Instagram Live have changed the video game. Users spend 10 to 20 times longer watching live video than they do pre-recorded video. The element of real time viewing and engagement offers exciting interaction for audiences.

Videos can come from anyone and from anywhere. Small videos can experience massive global reach, as was the case with the popular 'Charlie Bit My Finger' video, which had accumulated 886 million views by July 2021.

Brands use video-sharing platforms to connect with their customers, who are increasingly interacting with their brands by creating opinion videos, parodies, and responses. Individuals

have the power to market themselves, their ideas, who they are, and what they do. Video content helps you connect with your audience, creating an experience and encouraging engagement.

12.2 KEY TERMS AND CONCEPTS

Table 12.1

Term	Description
Annotation	A comment or instruction, usually added as text, on a YouTube video. A YouTube annotation may contain links directing users to other pages within YouTube or, if a brand is willing to pay, to outside websites. These have been phased out as of 2017 and replaced with video cards.
Captions	Text that appears over a video that labels a scene, identifies a location or person, or narrates dialogue on screen. Captions can be either open or closed.
Embedding	Taking video from an online video provider and posting it elsewhere on the web.
Google AdWords	Google's search advertising program, which allows advertisers to display their ads on relevant search results and across Google's content network.
Metadata	Information that can be entered about a web page and the elements on it to provide context and relevant information to search engines.
Search engine results page (SERP)	The actual results returned to the user based on a search query.
Thumbnail	The small, still image that is shown at the start of the video. This can be selected and can make a video more enticing.
Video cards	Calls to action that pop up during a video and entice certain actions from viewers. Replaced annotations in 2017.
Video search engine optimisation (VSEO)	Optimising videos for search engines, similar to the way in which one would optimise a website to rank higher on the SERPs.
Video syndication	The process of distributing and getting search coverage for videos.
Views	The number of times a video has been seen. Multiple views can come from one user.

| Viral video | A video that becomes immensely popular, leading to its spread through word of mouth on the internet via email, sharing on social networks, and other hosting websites. |
| Vlogger | Video blogger. A person who produces regular web videos about a chosen topic on a video-enabled blog. |

12.3 VIDEO CONTENT STRATEGY

Videos are powerful because they can have a strong emotional effect on viewers. It's no secret that funny, shocking, amazing, and inspirational videos do particularly well online. Video is the ideal tool for experiential marketing, giving viewers the chance to experience something alongside the onscreen actors and to consider how they would feel or act in that situation. It also helps to show off a brand's personality, tone, and communication style.

Video content is a necessary part of the digital marketing mix. Dr James McQuivey (2014) famously exaggerated that, "Video is worth 1.8 million words." Exaggeration or not, video is more engaging than any other form of content. Consider these statistics:

- Video on social media generates 1 200% more shares than text and images combined (WordStream, 2021).
- Companies using video have 41% more web traffic from search, and video can cause a 157% increase in organic traffic from search engines (Small Business Trends, 2021).
- Video on a landing page can increase conversions by 80% or more (Wordstream, 2021).
- Businesses using video grow revenue 49% faster year-on-year than those that don't use it (WordStream, 2021).
- 59% of company decision makers prefer to watch a video than read an article about a product (Forbes, 2017).

Many people are still under the misconception that online videos are expensive and difficult to produce, which is not necessarily true. While the most popular videos are professionally produced, for example, the Despacito music video has accrued around 7.7 billion views, the many millions of successful home video bloggers – vloggers – and marketers prove that low-cost videos can still make an impact.

Unlike content made for TV, web video content can be filmed at a much lower cost and quality, using readily available home video equipment. Affordable high-quality cameras have made quality content production a reality for everyone. Viewers don't necessarily expect a super-slick offering (though even this is possible with some basic video editing software). To get started with making video marketing content, you will need:

A camera: Depending on what you can afford, this can range from a simple webcam or your mobile phone's camera to a (top-of-the-line) professional camera, though there are many excellent mid-range options available at a low price.

A microphone: While some cameras have a built-in microphone, it is worthwhile investing in a proper mic to ensure that you capture better sound quality as built-in microphones tend to catch a lot of background noise at the expense of the main audio.

Video editing software: You will need a software package to cut, edit, and finish your video; there are a wide range of options, including free built-in software (Movie Maker for Windows and iMovie for Mac) and professional video editing suites (Final Cut Pro and Adobe

> **NOTE**
> There are many useful, free resources and tutorials on creating videos online. www.wikihow.com is a good place to start looking.

After Effects), which can be more costly. YouTube also offers an online video editing tool, and you can take a look at some of the available apps like Filmmaker Pro, ProMovie Recorder, and Adobe Premiere Clip.

12.3.1 Video content versus video ads

Video marketing covers two approaches.

1. **Video content:** These are videos made to entertain, inform, share updates, enlighten, or delight the viewer. Much like syndicated articles or blog posts, these are usually not directly promotional, but instead provide shareable content that gives value to the viewer. Some examples of video content include:
    *   How-to guides, tutorials, and explainer videos
    *   Conference talks
    *   Video presentations where video should be used to:
        *   Inspire, emotionally connect people
        *   Educate in a fun, informative, and entertaining way
        *   Reveal the unexpected
    *   Valuable industry updates
    *   Educational lectures
    *   Product reviews and advice
    *   Entertainment.

> **NOTE**
> If your company or brand wanted to create content videos, what format and approach would you use?

2. **Video ads:** These are simply adverts that are filmed and formatted for online use. These can be existing TV commercials that are shared online or custom ads made specifically for the web. Statistics about video consumption make a compelling argument for the latter over the former. We'll cover a range of options for posting your video ads below, in **Section 12.5.2 Paid video promotion**.

12.3.2 Is it possible to go viral?

The Holy Grail of video marketing and, in fact, any marketing on the web, is word of mouth – having a piece of content 'go viral'. This means that the content spreads from person to person through the web at a very high rate, attracting an exponentially growing audience as it gains

popularity. The key to this viral effect is social media, where each user is connected to a wide network of others and can easily share content with their friends. Because this is a trusted social referral, it's more likely that they will view and share it themselves, if it's good enough.

Figure 12.1 A screenshot of the most popular Will It Blend video on YouTube, indicating the number of times it has been viewed since it was uploaded in April 2010

Nobody quite knows the secret recipe for getting content to go viral, and quite possibly there isn't one; the sheer variety and scope of viral videos shows that almost anything might catch the interest of the internet on the right day. This means that it's very difficult to craft a video in order to make it go viral. Instead, focus on making great content that you and your audience will love and that speaks to their wants and needs and then, if you're lucky and your stars align just right, your video might go viral. Consider the following:

- **Address a currently trending topic:** Find something that users are already excited about or interested in, and see how you can contribute meaningfully to the conversation. For example, make your own edited version of a viral video.
- **Make it enticing:** Craft the video's description, title, and thumbnail so that they draw attention.
- **Make it remarkable:** Whether it's funny, astonishing, scary, shocking, or informational, your content has to have value for your viewers, and it has to give them social capital for spreading it.
- **Make it unique:** The internet loves new, fresh, crazy ideas, so don't rehash somebody else's success or stick to a formula. Be truly creative and inventive.

- **Make it shareable:** Include the tools and incentives to make your video easy to share; consider social media chiclets, video cards, and encouraging comments.
- **Make it short:** With very few exceptions, successful viral videos tend to be short, impactful clips. Users have short attention spans. You lose around 30% of your audience in the first two minutes, with a sharp drop off between 2 and 6 minutes, so make sure you get the message across quickly (Wistia, 2016).

12.4 VIDEO PRODUCTION STEP-BY-STEP

Creating video content for the web can be easy and cost effective, but it will always involve a lot of research, thought, and planning before you even get started with filming. Remember, you are not making a video series/podcast for a brand you work on or a brand you know. The content you are creating *is* the brand.

12.4.1 Know your audience

As always, you first need to identify the audience for whom you are creating this video content. What are their wants and needs? What video content are they already consuming? Where are they consuming it? How can you engage their attention, provide something valuable that fits the platform, and promote your brand at the same time? Some solid market research will reveal the answers to these questions.

12.4.2 Planning and conceptualising

Planning is your priority for successful video production. Brainstorm some ideas. You will need to come up with the core concept for the video, which will be determined by what your target audience wants. If you don't yet know what that is, go back to your target audience and ask what they need. A few questions you may ask yourself here are:

- Why would they watch/listen to your product?
- What do they need from it?
- Would they be likely to share it with others?

Decide on the best style and tone in which to convey this and then get into what each of your episodes is going to be about. It should be a logical narrative, each one closely related to your specific angle. Your episodes can be part of a continuous story, like in a podcast that's about one story, or different aspects under your topic umbrella.

Once you have decided these aspects, you have what you need to start planning your actual video shoot. Write a script, or at least prepare a breakdown of what the video should include, and schedule the shoot. Consider the venue, crew required, actors, and any other props or elements you will need. How long this takes will depend on the complexity of the video you're planning and your budget.

Give your product an identity

Make sure you have a logo for your title. Try not to make it too complicated; a good, strong font may be all you need. Just make sure that it's legible. It should look as polished and clear as possible.

For a video series, it's a good idea to have an introductory screen/animation to introduce your video. Simply make use of a title screen, but remember to include it in front of every episode to give your series consistency.

If you're making a podcast, add music in the same way you would for a video title screen. Choose a signature piece of music for your podcast so that it becomes part of the identity.

> **Important**: Use music from royalty-free sites. You can't use a popular song unless you've actually purchased the rights to it. You can choose from loads of royalty-free music online. Check out freemusicarchive.org and filmstro.com. With a little research, you will find there are many others to choose from.

For either video series or podcasts, you can also design cover art. This is the thumbnail that comes up in search and as the 'profile picture' of your videos and podcasts.

Watch your sound

Whether you're making a video series or a podcast, always prioritise your sound.

Hot tips for getting the sound right:

- Avoid recording voices in a noisy area. Unless you're a master of audio editing and you know how to change the volume on every track, you will struggle to drop the noise behind your speaking parts. Resist the urge to record or film interviews in coffee shops or anywhere in public where there may be a lot of background noise.
- If you don't have access to a 'dead' sound area (and most people don't), you can record on a mobile phone microphone under a duvet in a quiet room for a pretty pro-sounding effect. Alternatively, a decent quality of sound can be created in a car parked in a quiet area with all the windows and doors closed.
- Don't run music throughout your podcast. Listeners get very irritated by a constant low thrum of music underneath speech. By all means, drop in bits of music for atmosphere, but avoid a music 'bed' running in the background.
- If you do use music in your video/podcast, make sure that it doesn't overpower the speech. You don't want anyone to strain to hear what is being said.

It's not just interviews

Interviews can be great but they seldom make very compelling content. If your video series/podcast is merely a series of interviews about your topic, give it some more thought. Unless

it is exactly what your target audience wants, there's nothing very engaging about listening to people being asked questions over multiple episodes, unless every episode stimulates thought, interest, or entertainment.

To improve how it will be consumed, consider using one or two interviews, interspersed with some scripting and interesting narrative. Have you really chosen the most original angle you could have, or is it a bit of a seen-before?

If you are going to use an interview, think about how you could present it. A lot of times, the part where you ask the question is cut out and the answers given by the interviewee are edited together into one piece. This helps to make the format a little more compelling.

Remember to tell a story

Share a story or a series of stories but avoid a dry statement of facts. Make sure that you've done your research for your audience. For instance, few people need to know how to eat a strict keto diet again. There are a million other video series just like it. Maybe they want to know how to eat a strict keto diet with practically no money – your research will give you the cues you need to direct the story.

Be brutally honest with yourself

When it comes to creating digital content, being honest with yourself is very important. After you've watched/listened to what you've created, and you ask yourself "Would somebody really download this?", answer honestly. There is no point in creating average content when it's your product. We're in the business of making content that sells. If it's just okay, go back and see how you could make it good. If it's good, go back and see how you could make it great. Don't be content with the ordinary.

Spend a lot of time watching and listening

Watching how other people create successful content is an excellent way to pick up tips and follow best practice. Look at what they do well, what they don't do so well, and what they could do better. Then, bring your own production up to speed.

12.4.3 Producing and editing may take some time

It's time to get filming. Once you have all your footage and audio together, editing can begin. Save the majority of your project time for editing. Adding any special effects and other elements to your production can take

> **NOTE**
> For some helpful pointers and advice on producing your video, take a look at the Vimeo School: vimeo.com/videoschool.

time, especially if you want the end product to look and sound professional. Be pedantic and fussy with your editing process, because you want smooth editing with no jumps, skips, or disconnects. It may take a few tries to get it right, which is perfectly normal.

12.4.4 Choosing and uploading to platform

Once you have the video, you need to decide where you will have it uploaded. There are two options for making your video content available online. These are not mutually exclusive and there are techniques for both to ensure the best distribution and search coverage for your video. For example, you could be embedding videos posted elsewhere on your site or on social media, which is where a massive amount of video is being consumed.

Online video can be hosted on your own site, or it can be posted to one or many video distribution channels. If you post your video somewhere such as YouTube or Vimeo, it is then easy to embed it into your website as well.

The main advantage of posting a video to a third-party site is the opportunity to quickly exploit an already existing audience. These websites also usually have a built-in social and viral media aspect to their user experience. Video-sharing sites tend to have simplified algorithms which are easier to take advantage of, leading to more rapid universal search exposure.

Many third-party video hosting options exist. Short-form video platforms like TikTok, Instagram Reels and Snapchat have emerged to challenge existing industry giants like YouTube and, increasingly, Facebook.

To gain the most views for your videos, you need to find out where your audience is consuming video. Once you discover the platform of their choice, create videos for those specific platforms and post them accordingly.

As mentioned in the planning and conceptualising bullet, you should brand your channel. Many platforms encourage adding a logo, branded elements, a brand description, and links to your other web properties. You can customise your page as you see fit. Some platforms also have a range of analytical features for you to measure engagement and, as an added bonus, they work well on mobile devices, too. Using YouTube can help you gain many benefits in ranking well on the world's most popular search engine, Google.

A few more good options for free video hosting include:

- Facebook: facebook.com
- Vimeo: vimeo.com
- Dailymotion: dailymotion.com/us.

If your video is hosted on your own website, the obvious advantage is that you have control over the whole website and the environment in which it is hosted, from the look and feel to on-page text, metadata and user experience.

When it comes to advertising and related content, you control both, and you decide how to monetise it.
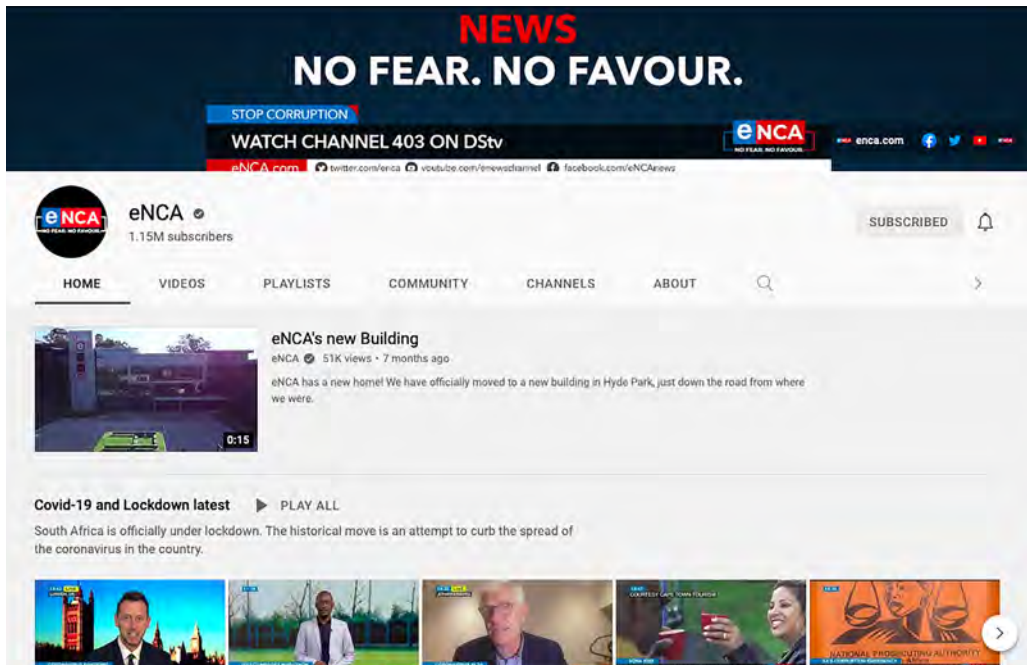
Figure 12.2 The eNCA channel on YouTube shows strong branding

Traffic and links go directly to your website and can therefore be integral to a longer-term search strategy. However, consider embedding your videos from your account on your chosen video-sharing site. Not only does this allow you to cross-pollinate content, but you will also gain more views via more points of entry.

> **NOTE**
> YouTube Analytics allow you to see who is watching your videos and insights on their demographics. It also shows your returning and new viewers, unique viewers, subscribers, and total members.

12.4.5 Optimising

To make it easy to discover on the web, it is important to optimise your video. Searching on the web is keyword based. Users type keywords relevant to their query into a search box, and the results of the search should list content that matches the keywords.

The search engine tries to match your keywords to the content it has indexed. It is also trying to determine how to rank the results so that you get the most relevant content at the top of your search results page.

> **NOTE**
> Video marketing needs to be timely, relevant, memorable, and optimised if you want to see any return on investment. Read about the Content Marketing Institute's Simple 5-step process here: contentmarketinginstitute. com/2014/02/optimize-video-content-simple-process/.

You would have learned more about this in **Chapter 5: Search engine optimisation**. Optimising video for search involves understanding the basics of SEO, as well as the particular challenges and tactics of optimising video content.

Search engines rely on being able to use text in the content to determine what it is about, and other indicators to determine how relevant that content is. When it comes to web pages, search engines can 'read' the text on the page to determine what the page is about. Moreover, they can measure the links coming in to determine how relevant the page is.

When it comes to video, although the search engine cannot 'watch' or 'read' the video in the same way that a human can, there are technological solutions that are starting to make this possible. For instance, Google Search tries to automatically detect the segments in your video and show key moments to users, without any effort on your part. Alternatively, you can manually tell Google about the important points of your video by visiting this site: developers. google.com/search/docs/advanced/guidelines/video.

To do so manually, it is good practice to include metadata to determine what the video is about. The search engine also needs to look for ways to measure relevance.

Marketers and website owners now need to optimise all forms of content, whether it be for text pages, images, or videos, in order to achieve better rankings. Video search engine optimisation (VSEO) involves the use of basic SEO foundations and additional creative optimisation methods to ensure that online video content appears higher up on the SERPs.

Optimising video for video-sharing sites such as YouTube means that your video will appear in search results on the video-sharing site and also on SERPs such as Google. While each video-sharing site will use its own algorithm, the guidelines below can be considered best practice across most of the video-sharing sites.

Video titles are very important

A video title is one of the first things a user sees when clicking through to a video. It is used, first and foremost, by the video search engines to determine the relevance of your video to the search query. Your most important keywords

> **NOTE**
> If you are creating a video series, use a standard naming structure for the title to make all videos easier to find.

should appear in the first three words of the title. Longer, descriptive titles are better than short, concise, and obscure, ones.

If you have a great title, it will grab the attention of the audience and you will get a lot of views. Promise value to the user with the title, and sparkle interest. A power word or two will grab the attention, but make sure it is not sensational or misleading. Steer clear of clickbait, such as 'How to get fit without exercise.'
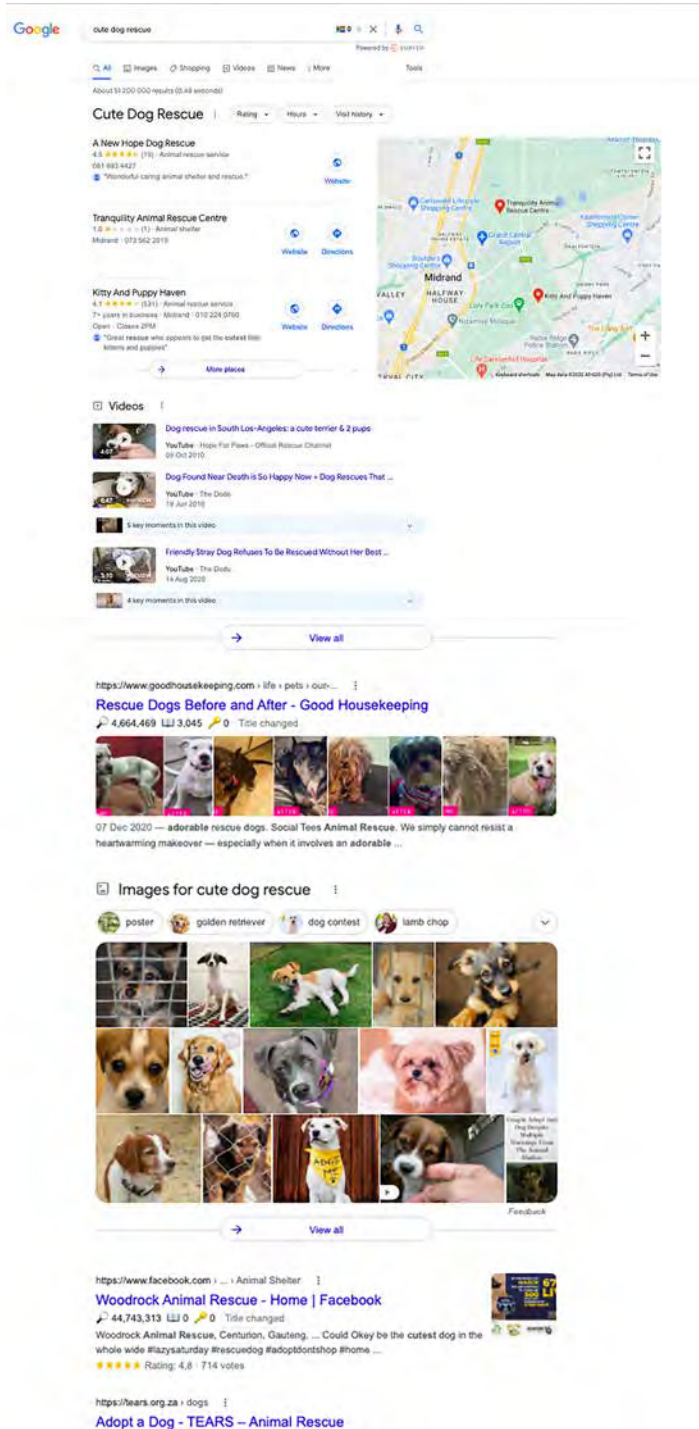
Figure 12.3 A search result for the words 'cute dog rescue' brings up location, videos, images as well as high ranking org sites
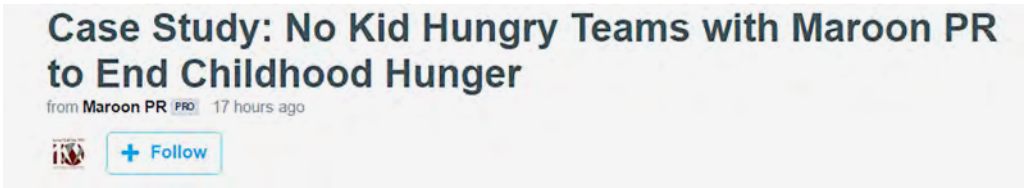
Figure 12.4 Video title on Vimeo

Use informative, long descriptions

Descriptions will contain key terms that search engines should be looking for to determine what the video is about. Use your most important keywords here. Include as much information as possible but use the most important information in the first 25 characters. Also include a link in your description to direct users to other content that you have.
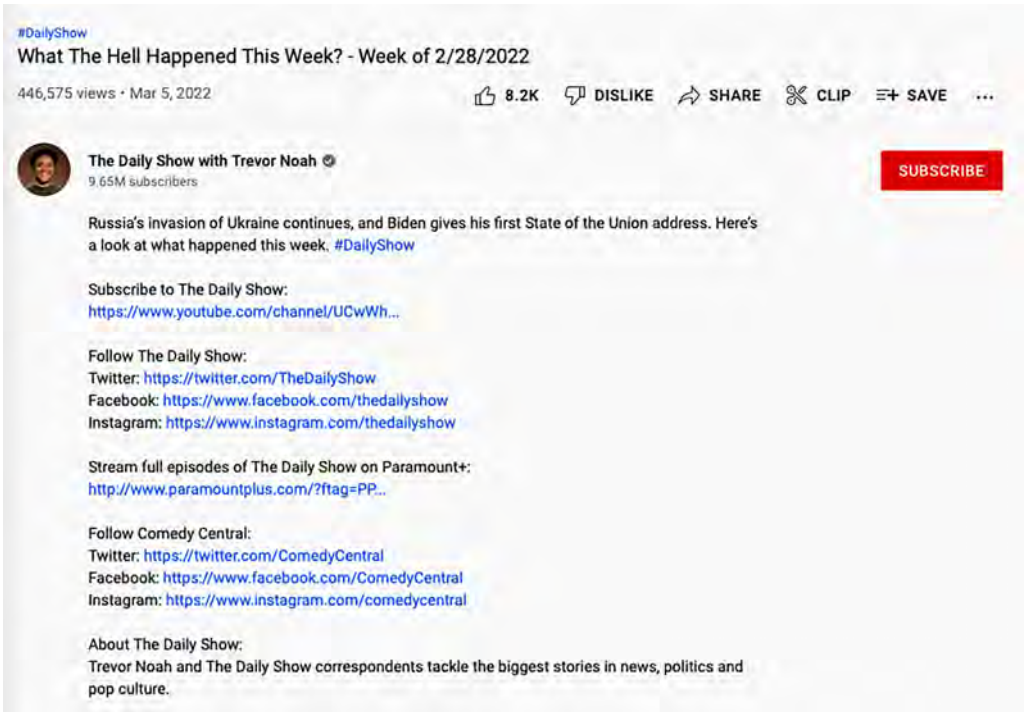

Figure 12.5 The Daily Show with Trevor Noah's video description on YouTube

Use the tags to input several keywords

Put your most important keywords first. You can also capitalise on popular search terms and piggyback on popular or topical phrases. The video hosting site will use your tags to help categorise your video. YouTube has also introduced hashtags to make searching easier; some other platforms already use these. Ensure that tags and hashtags are relevant to your video and utilise terms from the same category.

YouTube Suggest and Google Suggest are useful tools for generating ideas. You can view the tags other users use on YouTube to get some ideas by choosing 'view page source' from your browser's menu and doing a search for 'keywords'.

<meta name="keywords" content="Movies, film, foreign languages,

Figure 12.6 Video tags in HTML source code

Encourage comments, subscriptions, ratings, embedding, and sharing

Get users to engage with your video in any way you can, and don't forget to respond to relevant comments. It's critical that your budding audience community feels that they matter and that you are taking them seriously. This is a key point to remember if you want to create a thriving community. Engagement is a massive factor in search engine rankings, so it is very important to focus on content; strong optimisation is no substitute for weak content.

To incite discussion, consider posting a comment as soon as you have uploaded a video, or adding a video card to encourage feedback. Pose a provocative question to spark discussion and lead the conversation. Engagement is the absolute key to success in the social media space.
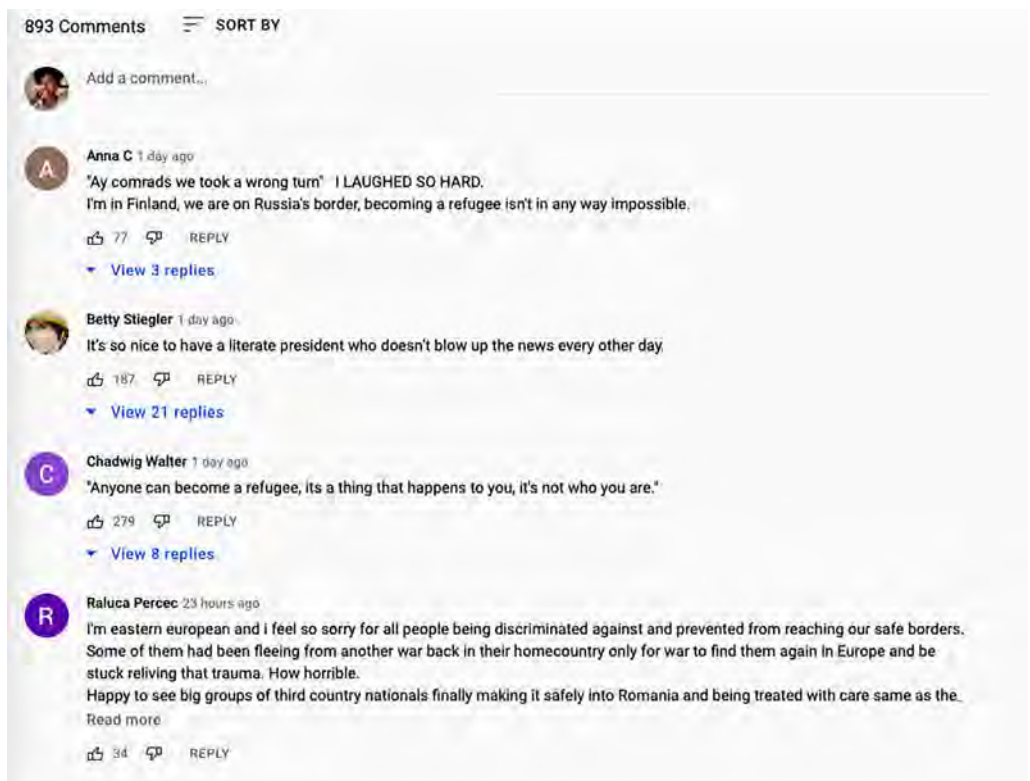

Figure 12.7 YouTube comments showing engagement with the brand

Optimise the thumbnail

Figure 12.8 Three thumbnail choices for YouTube videos – note the
clear branding and/or use of people to draw attention

Video thumbnails let viewers see a quick snapshot of your video as they're browsing YouTube. After your video is finished uploading, you can choose a thumbnail from the three options YouTube automatically generates or upload your own if your account is verified. You can look at it here: support.google.com/youtube/answer/72431?hl=en.

Consider adding an enticing thumbnail frame. YouTube allows you to choose any moment in the video to be the thumbnail. Many other video platforms also give you this opportunity. Simply optimising the thumbnail image can encourage increased clickthroughs and views, which help to increase search visibility.

Use video cards and end screens

Use video cards to link to and from other video properties. Cards allow you to add text boxes with clickable URLs, which are crawled by the search engine spiders as well, at points of your choosing in your video. Cards in already popular and current videos can be used to drive traffic to new videos, although it should be standard practice to include them in a video as soon as it has been uploaded. It's also a great way to encourage viewers to subscribe to your YouTube channel.

> **NOTE**
>
> A great way to use end screens is to link to some of your other videos at the end. This works similarly to 'articles you may like' at the end of a blog post. You can also use video cards to do this during the video.

The nature of YouTube is such that the number of views for pages on which videos are watched is always higher than channel views. However, if there is a paid search campaign running, the option to play clicked videos on the channel page exists. This is optimal to boost interactions with the branded channel header image, increase engagement with the playlist, and raise the channel view stats.

Upload videos regularly

Upload videos regularly to ensure continuous channel activity and topical interest. Consider the nature of the brand and what you are trying to communicate to your viewers. Decide how often videos are uploaded but remember, the more videos you upload, the higher your channel

will rank as a result of Google picking up on your fresh content. Think of it like a TV schedule that lets users know when your 'show' is on so they know when to come back.

It also helps to delete videos that are not successful. The amount of content you upload is also dependent on the service or product your brand offers and your video budget. It's a careful balance of not overloading your channel with useless media and keeping content fresh and engaging.

12.4.6 Engaging the community

It's always essential to engage with your community. Respond to any comments or questions in a timely manner, and take feedback on your content into account when planning new videos. There are millions of new videos being added every day, and your audience will not necessarily stay hooked for very long. That is why it is important to ensure that you engage with them to create a sense of community, to relate to them, and to show genuine interest.

12.4.7 Reporting

As with all digital marketing tactics, in video marketing it's essential to track and analyse data about your activities, and then to optimise your strategy accordingly. When creating video content, use the various measurement options available to determine what you can do better going forward.

YouTube Analytics is a free tool that enables anyone with a YouTube account to view detailed statistics about the videos they upload to the site. You can see how often videos are viewed as well as how popular they are relative to all videos in that market over a given period of time.

You can also delve deeper into the lifecycle of videos, such as how long it takes for a video to become popular and what happens to video views as popularity peaks. YouTube even breaks down the specific second when users stop watching the video.

Using these metrics, you can increase your videos' view counts and improve popularity on the site. For example, you might learn that your videos are most popular on Wednesdays, that they have a huge following in Spain, or that new videos that play off previous content become more popular more quickly. If you see users dropping off halfway into the video, add a video card to mix things up. There are many creative ways to approach this.

With this information, you can concentrate on posting compelling, fresh content that appeals to selected target audiences, and post these videos on days when you know these viewers are on the site. You could even go a step further and customise the video, dubbing it in Spanish, closed captions also support SEO efforts. The range of possibilities to customise and optimise your content is limited only by the brand's level of willingness.

Furthermore, you can access a breakdown of how viewers discovered a specific video, which can then be used to optimise the keywords, tags, and descriptions of videos.