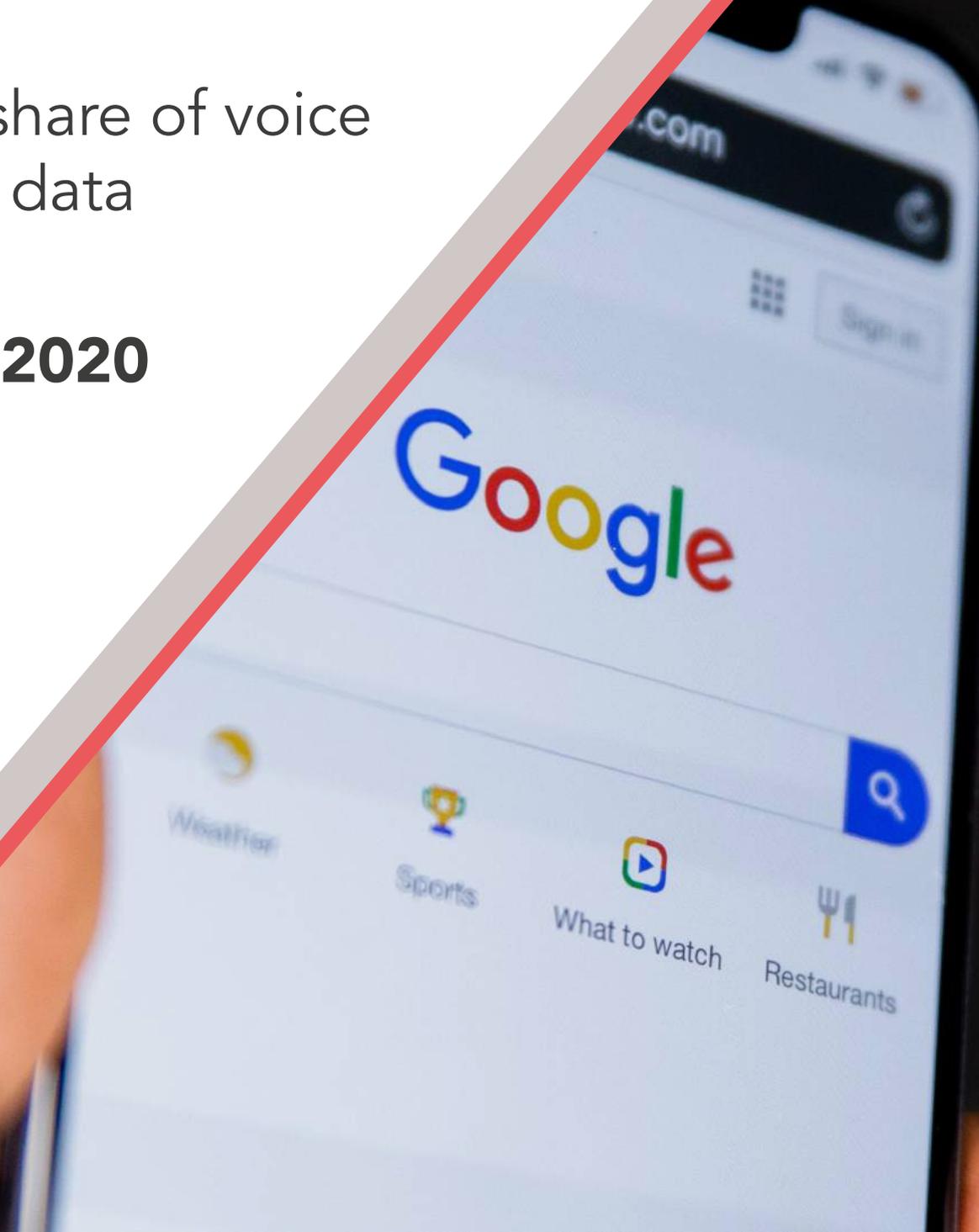


BABEL

SOS IS NOT A DISTRESS CALL

Building share of voice
with hard data

October 2020



BACKGROUND

Share of search (SoS), dividing the number of searches made for a given brand by the total searches for all brands in a particular category, has been gaining some significant ground recently as a much more reliable proxy in the advertising world for share of voice (SoV). Getting a handle on SoV is critical for budget setting, predicting growth and forward planning but it can be devilishly difficult to accurately measure.

That's where SoS comes in - Les Binet, Group Head of Effectiveness at adam&eveDDB, has been looking at SoS as a key measurement factor for some time and recently presented his research in detail. You

can see his presentation at <https://vimeo.com/465319431> but his key findings are that SoS correlates with market share and that SoS is a leading indicator and predictor of Share of Market.

This is something that many of us knew instinctively, and it's nice to see some solid research applied to validate it. But what does that mean for PR and communications professionals, and specifically, those us working in the B2B technology world where the relative shortage of available data, compared to the FMCG sector, can lead to significant errors and anomalies in the analysis?





When SoS goes up,
share of market tends
to go up

APPLYING THE CONCEPT

There's little doubt that we should all be looking at ways to assess SoS. Although increasing SoV isn't all that we hope to achieve with our PR toolkit, it is high on the list precisely because, as Binet notes, when SoS goes up, share of market tends to go up (and the converse is also true).

If any industry has struggled with viable measurement methodologies over the years, it's PR. Advertising value equivalent (AVE) has largely been discredited but it's still hanging on, primarily because it's easy for those outside of PR to get their heads around. We do have viable alternative methodologies to measure SoV but, in the main, they are much harder to understand, they are open to interpretation and unfortunately, they are also open to manipulation. SoS, on the other hand, is based on hard data and measuring it is something Babel has been doing for a number of years in one form or another.

Measuring SoS has become an essential tool for us, both to design campaign strategy and tactics and then to understand the impact of our work. If you really understand which companies are involved in the market, technology or issue of interest, what their relative share of search is and what factors are contributing to that share, you are a long way down the road to designing and delivering successful campaign strategy and tactics.

Of course, PR activity isn't the only

contributor to SoS – a wide variety of factors are in play – so we first need to consider how we isolate the contribution we make. The first step in that process is to look at the available data, and that's easier to explain with an example.

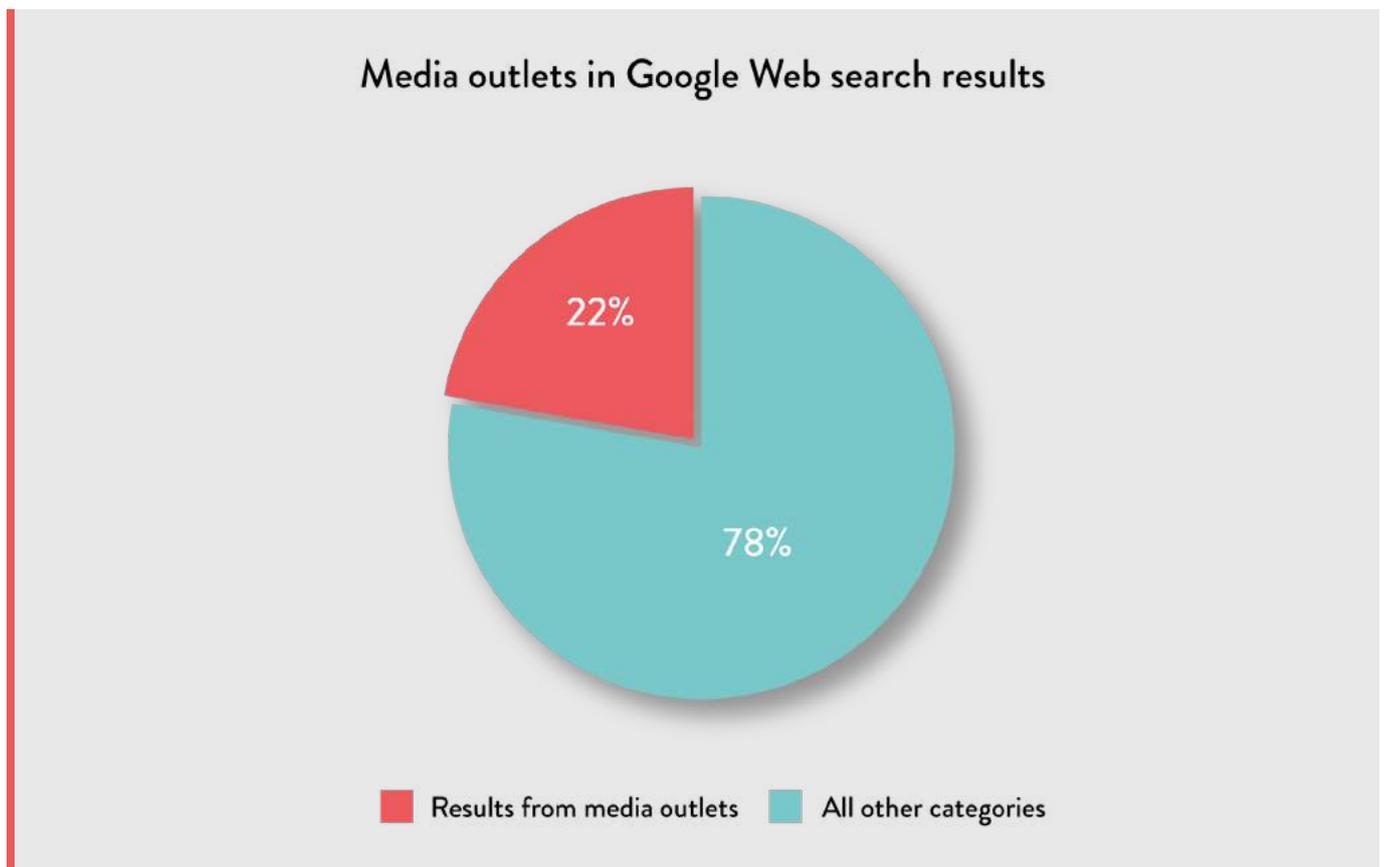
In the B2B technology world we are normally looking at relatively small data sets. Large data sets help to negate the impact of false positives and negatives and since that luxury isn't available to us, the analysis needs to be more granular. In the example below, we've looked at SoS around a particular technology (Open RAN) that is attracting attention in the mobile telecoms industry.

For anyone not in the telecoms sector reading this paper, Open RAN refers to cellular radio networks that are comprised of hardware and software components from multiple vendors operating over network interfaces that are open and interoperable. It is getting a lot of attention because it is giving operators more choice in how they build their networks, and also promises to help them reduce costs by putting software at the heart of their infrastructure. OpenRAN may be new but the concept will be familiar to most people working in the technology sector. It's the sort of change that has been seen in many technology sectors, presenting challenges to incumbents and opportunities to new entrants. Unsurprisingly, it's become a significant talking point with a wide range of companies involved in the conversation.

THE EXAMPLE ANALYSIS

It's easy enough to look through web search results to see which companies are leading in terms of SoS. You can do it manually or automate at least some of the process. We won't go into that here, but whatever method you use, you will soon come to a view on which companies are leading for any given search topic. Unfortunately, it doesn't tell us what we can influence without digging deeper.

Our next step is to take a look at the categories of content those search results point to, and in PR and communications, that could be paid, earned, shared, owned content (the so-called PESO categories). We're interested in them all but to simplify matters in this analysis, we're only going to look at earned media coverage.



A simple Google web search (undertaken on 15th September 2020 using "Open RAN" OR "OpenRAN") produced 119 results and when we look at those results, nearly a quarter are pieces from traditional media titles. The first conclusion we draw from this is that solid media coverage, despite the growth of social platforms and the heavy promotion of paid and owned content, has a very significant impact in this particular topic of interest.

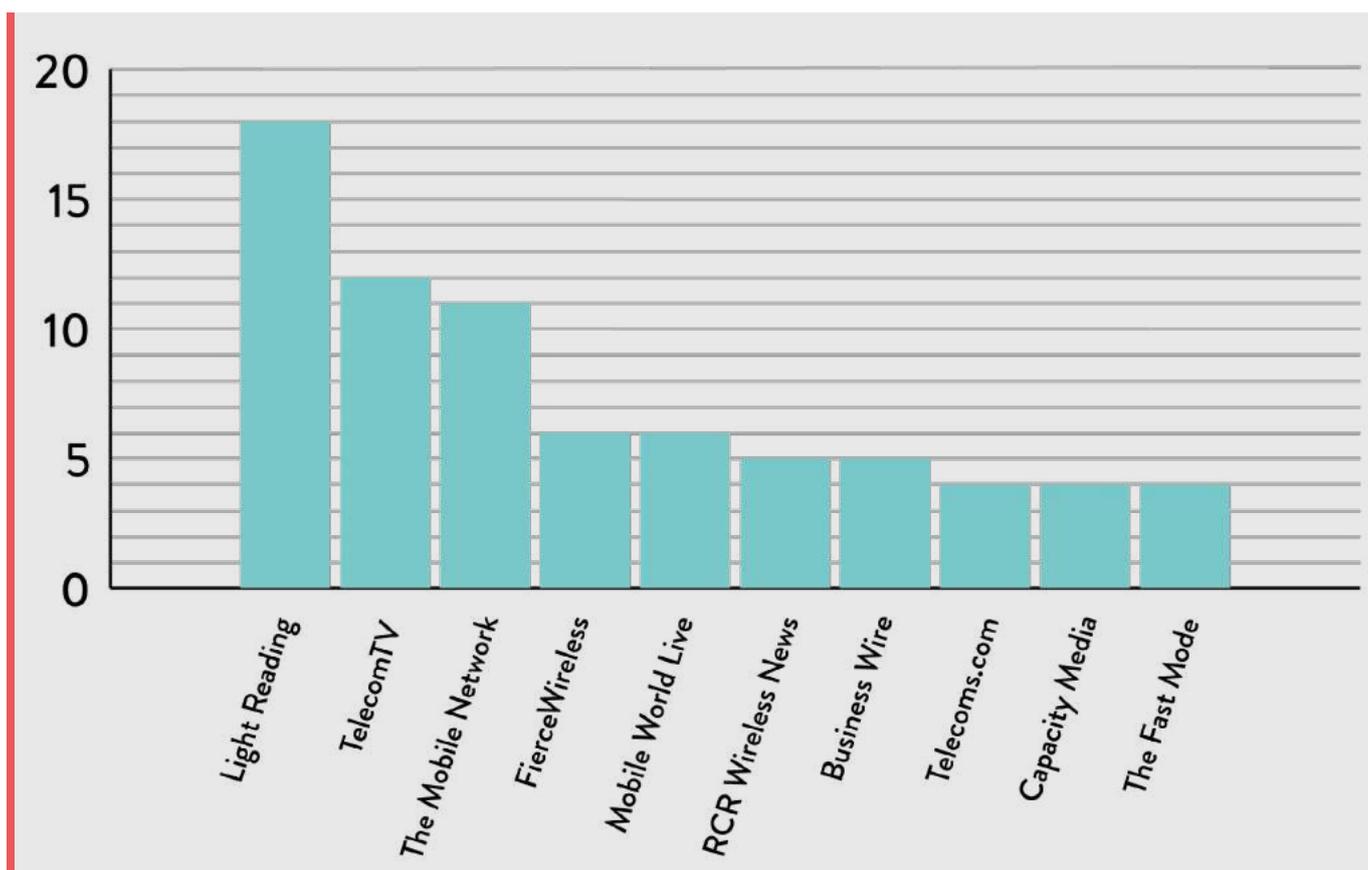
The percentages will vary, but in B2B technology, that's a pattern we see repeated often.

Now it's time to examine those media titles and how often each appears in the search results. That gives us a good indication of the relative weight we should be giving them in any campaign thinking and implementation.

To do that we will normally carry out another search, using the same search terms, but this

time, since we are looking specifically at the media titles that have an influence, we'll search using Google's 'News' tab and we'll also look back over a defined period. What we are trying to do is to smooth out any anomalies that may be present. For instance, one company's flurry of activity in the period immediately prior to the original search may result in significantly more results that may not reflect the overall position.

In this case we asked Google (from the UK) to deliver results for the search term in the 12 months to 30th September 2020 i.e. to exclude the last couple of week's activity. We also restricted ourselves to examining the top 100 results. The chart below shows which titles were most often represented.



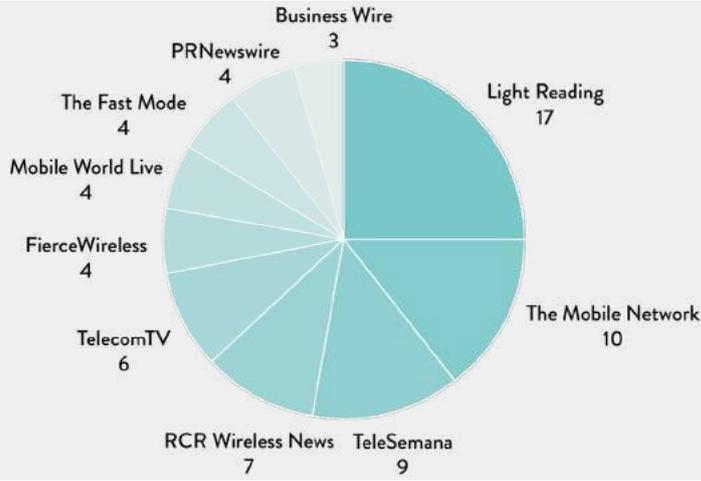
We now have an even better handle on which titles we ought to be targeting, but this doesn't mean you ignore the others. They may be major international business titles with good ranking potential, but that top 10 represents 75% of the 100 results and so they are clearly influential on the topic.

GEOGRAPHIC PERSPECTIVES

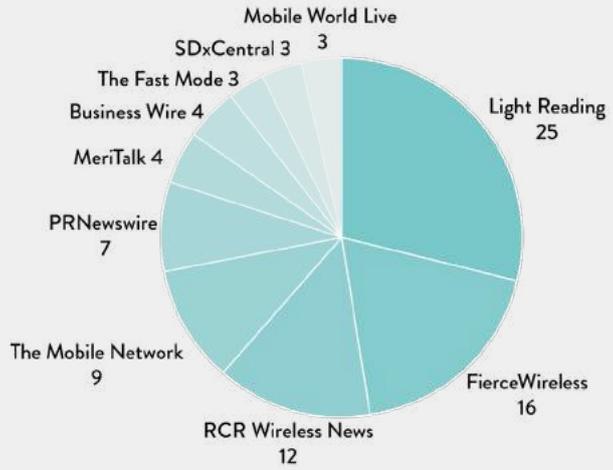
It's also worth mentioning that a Google search from the UK is of limited use if you are actually interested in what's happening in other markets. The results change depending on search location. In this case, as shown below, the changes are not dramatic but that isn't always the case.

Here we can see that there are differences, but an awful lot of commonality, and that information can help to define the approach, particularly if budgets are limited. In this instance, English language titles dominate and so an English language-based outreach campaign may achieve significant results without having to go the expense of translations and outreach in every individual market.

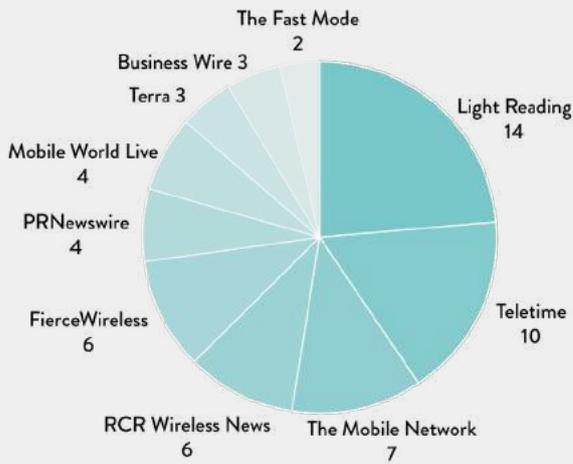
SPAIN



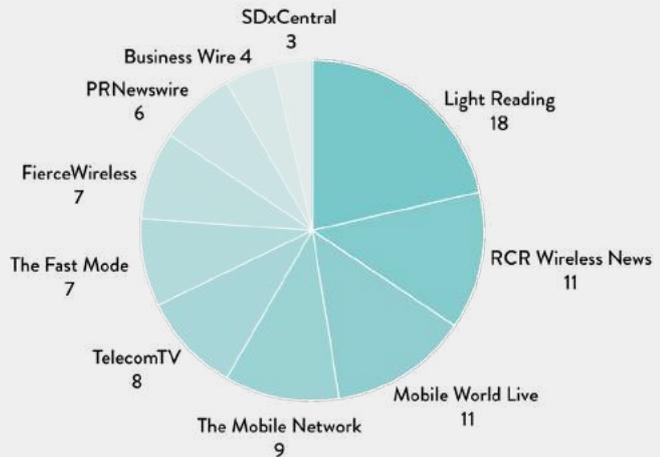
USA



BRAZIL

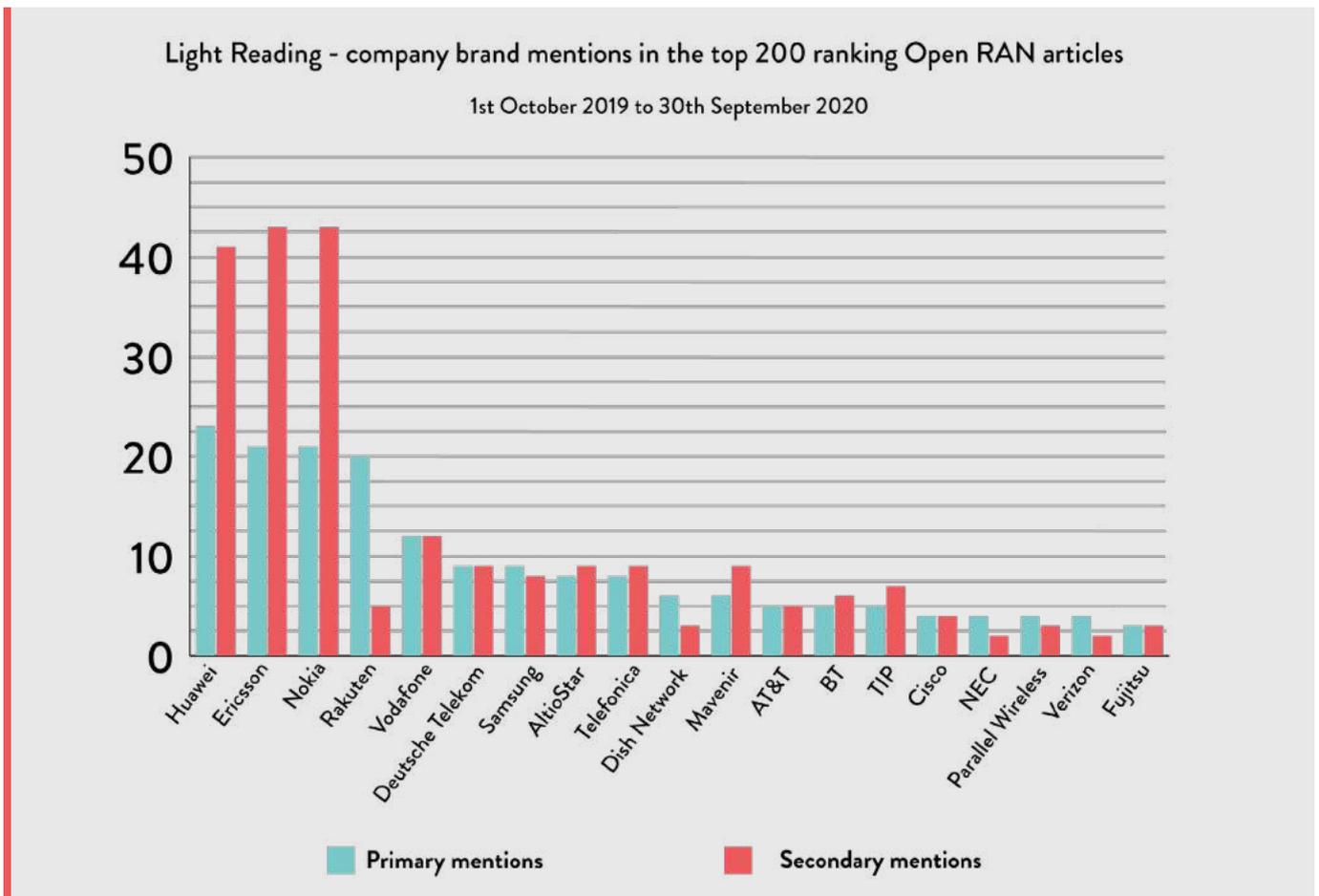


SINGAPORE



UNDER THE HOOD OF SPECIFIC MEDIA TITLES AND THEIR CONTENT

The next stage of the analysis is to take a closer look at each of the titles to find out how much prominence they might be giving to particular companies, and the categories of that coverage. To do that we search individual titles, using Google's domain search functionality, on the topic in question, typically over a six- or 12-month period. Shown below is a summary of the incidence of company brand mentions (either a primary or secondary mention), for the top 200 ranking articles in Light Reading in the period 1st October 2019 to 30th September 2020 (Open RAN related).

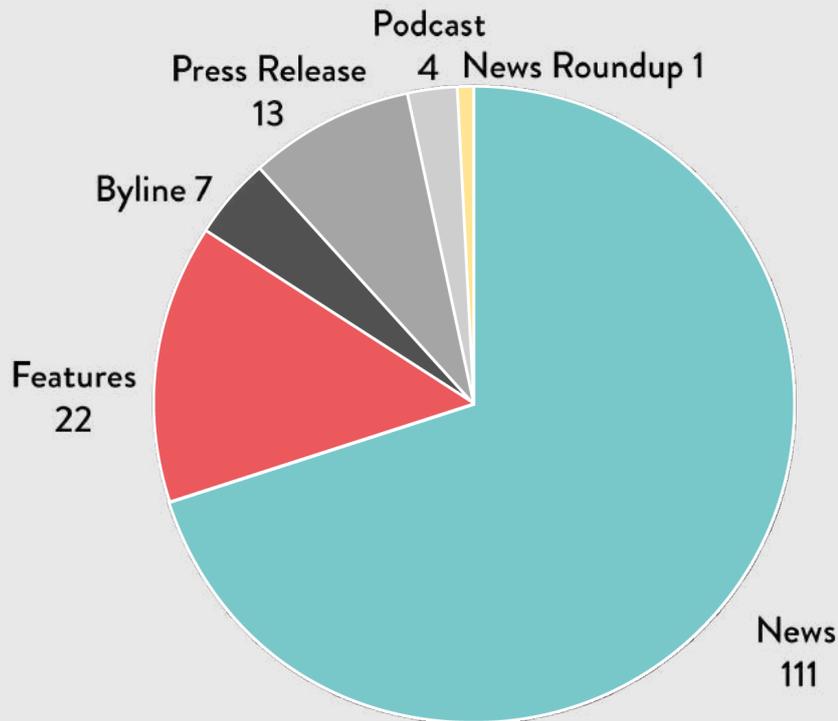


It's important to understand that the bar chart doesn't give you the full volume of articles that Light Reading is publishing about each of the companies shown and it doesn't necessarily reflect what ranks well in the more generic 'OpenRAN or 'Open RAN' search. It is simply showing those ranking highest in that specific media title search.

It is useful though to do an analysis of any common factors in the articles that are ranking and, as per the pie chart on the left, it's hard news that dominates in Light Reading's ranking news. For other titles there may be a higher percentage of features or bylines that rank highest, but you'll only find that out by doing the individual analysis.

Much more intelligence can be gained with human analysis of the articles in question and particularly if you look at what might have made a story rank for one of the lesser known brands. What made that story stand out and rise up the ranks?

Article categories in Light Reading ranking news for Open RAN



DIGGING INTO YOUR EFFORTS

Typically, the final stage of our analysis is to look in detail at the traction a company we are working with is getting in each of the titles that has been established as a top tier target. Once again, Google is our friend and provides the tools we need to do the analysis and, more often than not, much more accurately than any of the dedicated media tracking and monitoring tools we have available. We want to answer a range of fundamental questions:

- What's working already and what isn't?
- Are there any titles that aren't currently being targeted?
- Is effort being expended on activity that isn't going to shift the needle?
- What relationships do we need to build on behalf of our client?
- What categories of content do we have to create and what messages need to be delivered within that content?

- Do we need to make subtle alterations or is a radical change in direction required?

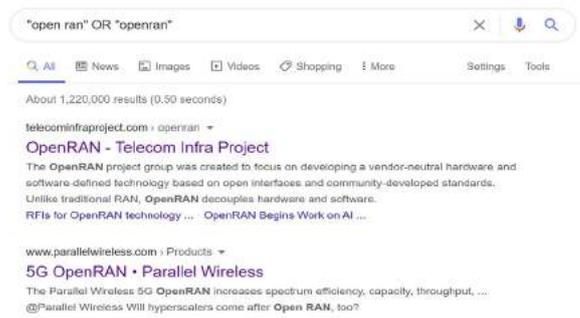
There's little point in carrying out that analysis as part of this paper, however: this is where human intelligence becomes a large part of the equation. There may well come a time when AI technologies can provide a useful analysis (and recommendation) on even small data sets, but we aren't there yet. Until that time, we rely on a careful human assessment of the data we have available.

In this instance, that analysis would very quickly reveal that some companies feature prominently only because a good proportion of the coverage focusses on the potential threat to their established businesses.

CONCLUSIONS

There's no doubt that SoS can be a good proxy for SoV and SoV is an indicator of market success. Additionally, it's also clear that in the B2B technology world, traditional media titles can have a lot of value - strong editorial coverage features prominently in search results.

The data available provides the overall volume of articles related to individual companies within a web, news or domain search, where and when those articles are published, and which are ranking well. When coupled with a human analysis of the highest-ranking articles, what emerges is valuable intelligence that can be used to design and optimise campaigns. It's at least part of the reason why a company like Parallel Wireless, a Babel Client, ranks highly at the time of writing in the results of a search on "OpenRAN" or "Open RAN".



This same sort of approach to analysing search data can be applied to paid, owned and shared content – it's important to establish what contribution that content makes (or can make) to search visibility and allocate resources accordingly.

There are rarely any guarantees in public relations but the data is available to make achieving the objective easier. If it's harnessed and interrogated carefully, you don't have to shoot in the dark.

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