



Social Insights on the Telecommunications Industry



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1.0 A Foreword on the Telecommunications Industry

Telecommunication businesses, having both improved the quality of care and lowered costs through social customer service programs, recognize the potential of social media.

Still, while some have proceeded to implement robust social intelligence programs, too often they've remained narrow-minded, neglecting the ways that social data can support their business beyond customer service. That trend is changing.

Firstly, telecommunication businesses are quickly developing a strong framework to support data-driven decisions. According to KPMG surveys, 58% of these businesses claim to either have high data analytics literacy or be rapidly moving towards it.¹

Secondly, they are beginning to recognize the broad range of endeavors that social data can inform. In the same survey, respondents reported acquiring customers, product positioning, operational excellence and competitive intelligence among the most effective applications of data and analytics.

Together, these developments have set the table for telecommunications businesses to transition from effective social customer service providers to socially intelligent businesses.

But as social intelligence is less public-facing than social customer service, the transition will occur behind the scenes, with each business adopting at different times and to various degrees. As always, the early adopters, benefitting from better-informed decisions, will gain a unique edge on their competitors.

The success of social customer service programs have opened up the telecommunication industry's decision-makers to the opportunities that social media offers. Those leaders would be remiss to not explore how social conversations can further support their businesses.



Alberto Ares

Telecommunications Sector Lead at Brandwatch

¹ KPMG. 2013 Media and Telecommunications Industry Outlook Survey. 2013.

2.0 Aim and Methodology

The following report aims to provide telecommunication brands with an understanding of the current online landscape, actionable competitive benchmarks, and several specific guidelines for improving social intelligence. The analysis is divided into five main sections:

- 1. Telecommunications Social Index:** Provides a comprehensive ranking for 25 brands across five key factors: Social Visibility, General Visibility, Net Sentiment, Reach Growth, and Social Engagement and Content.
- 2. The Brand-Audience Relationship:** Explores the way brands communicate with their audiences and how audiences receive that content.
- 3. A Look at Telecommunication Audiences:** Examines the gender, interests and professions of telecommunication audiences at the industry and brand level.
- 4. Customer Service Analysis:** Analyzes key customer service issues directed at nine major social customer service accounts.
- 5. An Intent to Switch Services:** Analyzes key customer service issues directed at nine major social customer service accounts.

The data and insights are derived through enterprise social intelligence software Brandwatch Analytics. The analysis examines 25 telecommunication businesses across the globe. Data is collected through three formats:

Queries: Collects general mentions of a brand online. Brandwatch Queries, based on boolean operators, are completely customizable to filter out spam or irrelevant conversations.

Twitter Channels: Collects Twitter data based on specific brands' accounts. Twitter Channels tracks @mentions, replies, retweets, and followers directed at selected Twitter accounts.

Facebook Channels: Collects Facebook data based on specific brands' accounts. Facebook Channels tracks likes, posts, comments, shares, and pages likes on selected brands' Facebook pages.

For further questions on the aim, methodology or analysis in this report, please contact Brandwatch directly.

3.0 The Telecommunications Social Index

The Telecommunications Social Index offers a context from which brands can benchmark specific factors of their online presence against competitors.

The index evaluates 25 brands across five specific attributes:

- Social Visibility: measures the volume of conversation a brand generates across key social channels.
- General Visibility: measures the volume of conversation a brand generates on blogs, news outlets and forums.
- Net Sentiment: evaluates the composition of negative and positive mentions of a brand in the context of that brand's entire conversation.
- Reach Growth: measures the growth of a brand's following over the course of a month, appropriately weighted according to the brand's current following.
- Social Engagement and Content: evaluates how effective brands are at communicating or responding to their audiences and how well their social content is received across social channels.

The Composite Score reflects a brand's performance across the five categories. For all five categories, brands are normalized against a single leader, which receives a score of 100. As such, the maximum potential score is 500.

THE TELECOMMUNICATIONS SOCIAL INDEX

	BRAND	SOCIAL VISIBILITY	GENERAL VISIBILITY	NET SENTIMENT	REACH GROWTH	SOCIAL ENGAGEMENT & CONTENT	OVERALL SCORE
1	AT&T	100	100	58	95	60	412
2	Globe Telecoms	96	33	87	94	84	394
3	Verizon Wireless	82	95	61	100	51	388
4	Sprint	92	57	60	88	70	368
5	Telstra	78	59	53	76	97	363
6	Comcast	89	92	39	83	56	359
7	Virgin Media	79	51	51	71	100	352
8	Dish Network	48	98	68	78	57	348
9	StarHub	65	33	100	53	92	343
10	Time Warner Cable	61	83	48	75	69	335
11	EE	67	45	47	78	96	333
12	O2	77	41	52	80	74	324
13	Optus	67	45	58	64	88	323
14	DirecTV	82	62	53	82	35	314
15	Sky	62	67	66	75	43	313
16	Movistar	61	49	60	74	59	303
17	Vodafone	67	79	30	74	51	301
18	BT	46	56	56	61	80	298
19	Orange	38	53	60	87	53	292
20	KPN	54	40	71	60	54	280
21	SingTel	57	40	46	57	71	272
22	Bell	51	53	49	59	60	272
23	Centurylink	41	58	47	49	68	264
24	Swisscom	31	33	69	59	66	258
25	TeliaSonera	15	36	76	23	37	186

Figure 1: Analyzes 3,270,660 conversations from Twitter, Facebook, blogs, forums and news sites. Data collected from September 9th – November 9th, 2015. See monthly updates of these scores on [Brandwatch's Social Indices](#).

4.0 The Brand-Audience Relationship

Social media empowers consumers with the ability to discuss, complain and share ideas with brands at an unprecedented level. While this development has brought brands closer to their consumers, it has also led to an onslaught of conversation from consumers – conversation that may house serious business threats, useful ideas or opportunities to build valuable relationships.

While consumers produce more conversation than telecommunications brands, the industry actually maintains a much stronger voice against its followers than most.^{2,3}

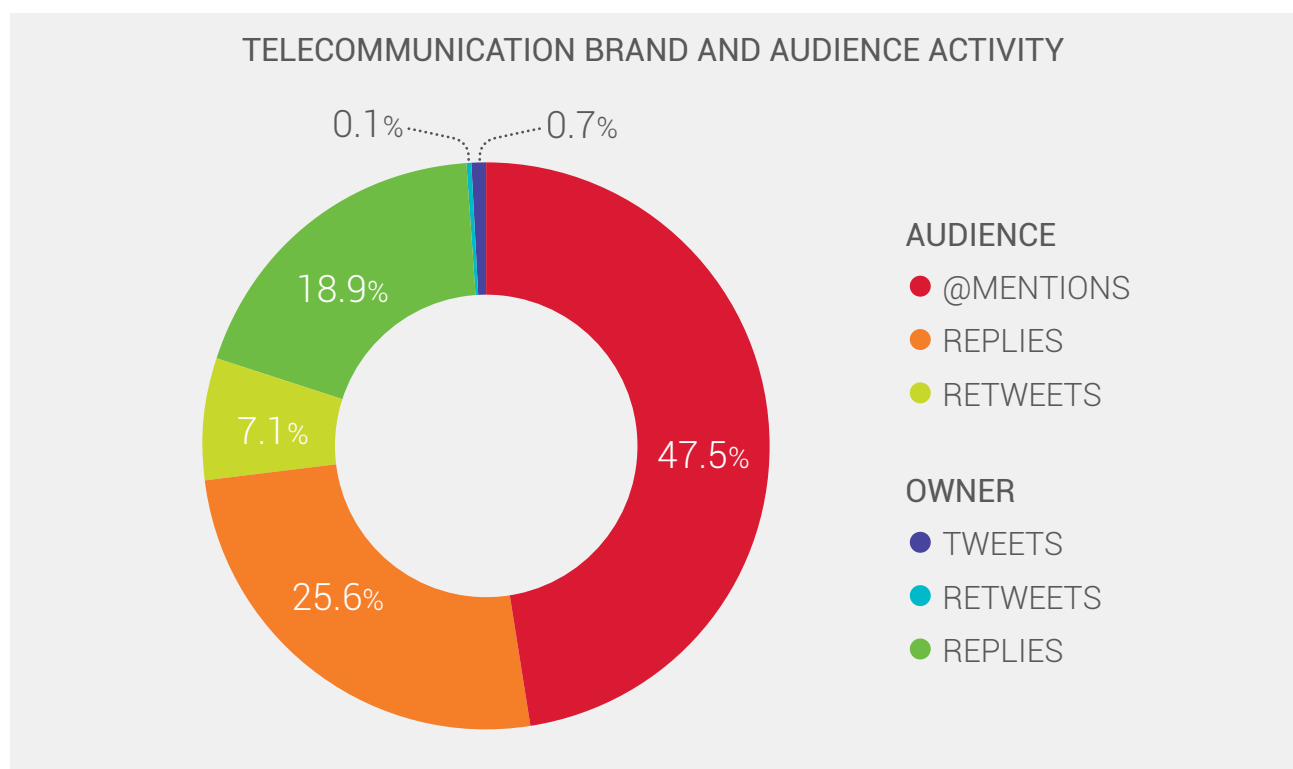


Figure 2: Analyzes 1,525,198 tweets from September 9th – October 30th, 2015.

For the businesses analyzed, audiences controlled 80% of the conversation. Of the 20% of the conversation coming from branded accounts, the vast majority is replies to the audience's concerns. Clearly, audiences are driving the discussion.

Yet brands have both a responsibility to respond to their audience's concerns and an opportunity to direct the discussion. After all, 33% of the conversation consists of the audience's replies and retweets of brand content.

While brands cannot control what their consumers say, they can use social intelligence to inform their business decisions upon the negative and positive feedback from their audiences.

² Brandwatch. Social Insights on the Luxury Fashion Industry. 2015.

³ Brandwatch. Social Insights on the Television Network Industry. 2015.

An analysis of brands' Twitter and Facebook channels reveals just how much feedback and input brands receive on a daily basis.

AN AVERAGE DAY ON TWITTER			
TELECOMMUNICATION BRANDS		TELECOMMUNICATION AUDIENCES	
AVERAGE FOLLOWERS: 232,568			
TOTAL TWEETS	156.98	TOTAL @MENTIONS	649
REPLIES	149.82	REPLIES	204
RETWEETS	0.90	RETWEETS	59

Figure 3: Analyzes 2,042,309 tweets from September 9th – November 9th, 2015.

AN AVERAGE DAY ON FACEBOOK			
TELECOMMUNICATION BRANDS		TELECOMMUNICATION AUDIENCES	
AVERAGE FOLLOWERS: 2,056,981			
POSTS	2.44	LIKES	1,762
COMMENTS	99.13	COMMENTS	236
		SHARES	113

Figure 4: Analyzes 622,047 Facebook conversations from September 9th – November 9th, 2015.

On average, these brands tweet 156.98 and post 2.44 times per day – they are significantly more active on Twitter than other industries analyzed. For reference, leading brands in Food and Beverage (26.32 tweets, 1.55 posts), Nonprofit (11.30 tweets, 2.74 posts), and Television (26.32 tweets, 8.55 posts) are all considerably less active on Twitter. ^{4,5,6}

⁴Brandwatch. Social Listening in the Restaurant, Food and Beverage Industry. 2015.

⁵Brandwatch. Social Listening in the Nonprofit Sector. 2015.

⁶Brandwatch. Social Insights on the Television Network Industry. 2015.

4.1 Brand-Audience Timing

Timing can be an essential part of a brand's social presence. Providing consistent social content ensures that audiences have more opportunities to notice and engage with brands. Handling consumers' questions and comments in a timely manner translates to happier customers and higher brand loyalty.

While the telecommunication industry's communication is fairly well aligned with their audience's, an analysis of the volume of brand posts and audience conversations directed at telecommunication brands reveals some disparities in the times they're active online.

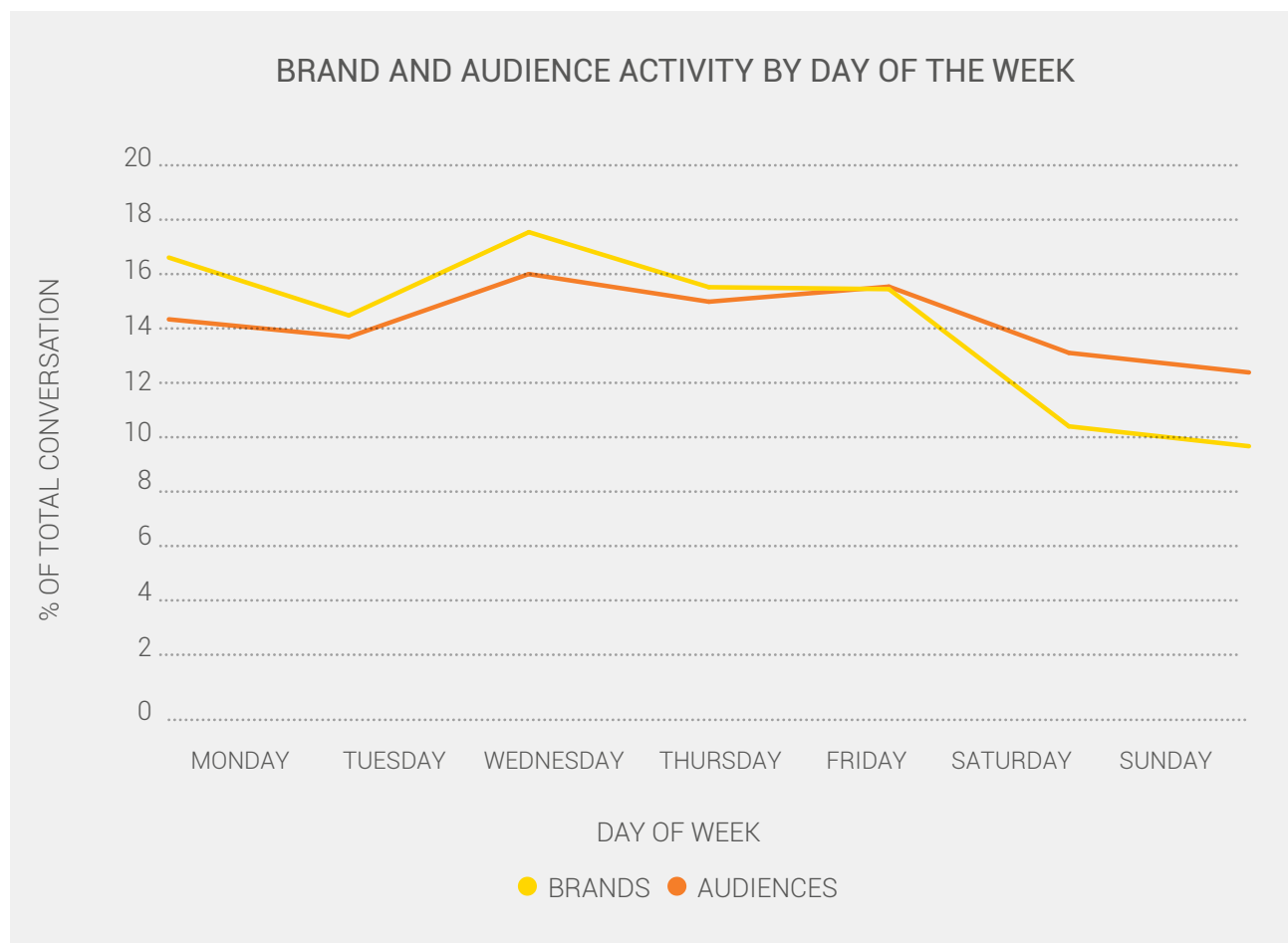


Figure 5: Analyzes 1,103,067 tweets from September 14th – October 27th, 2015.

While their audiences are consistently active throughout the week, telecommunication brands' activity drops slightly on weekends.

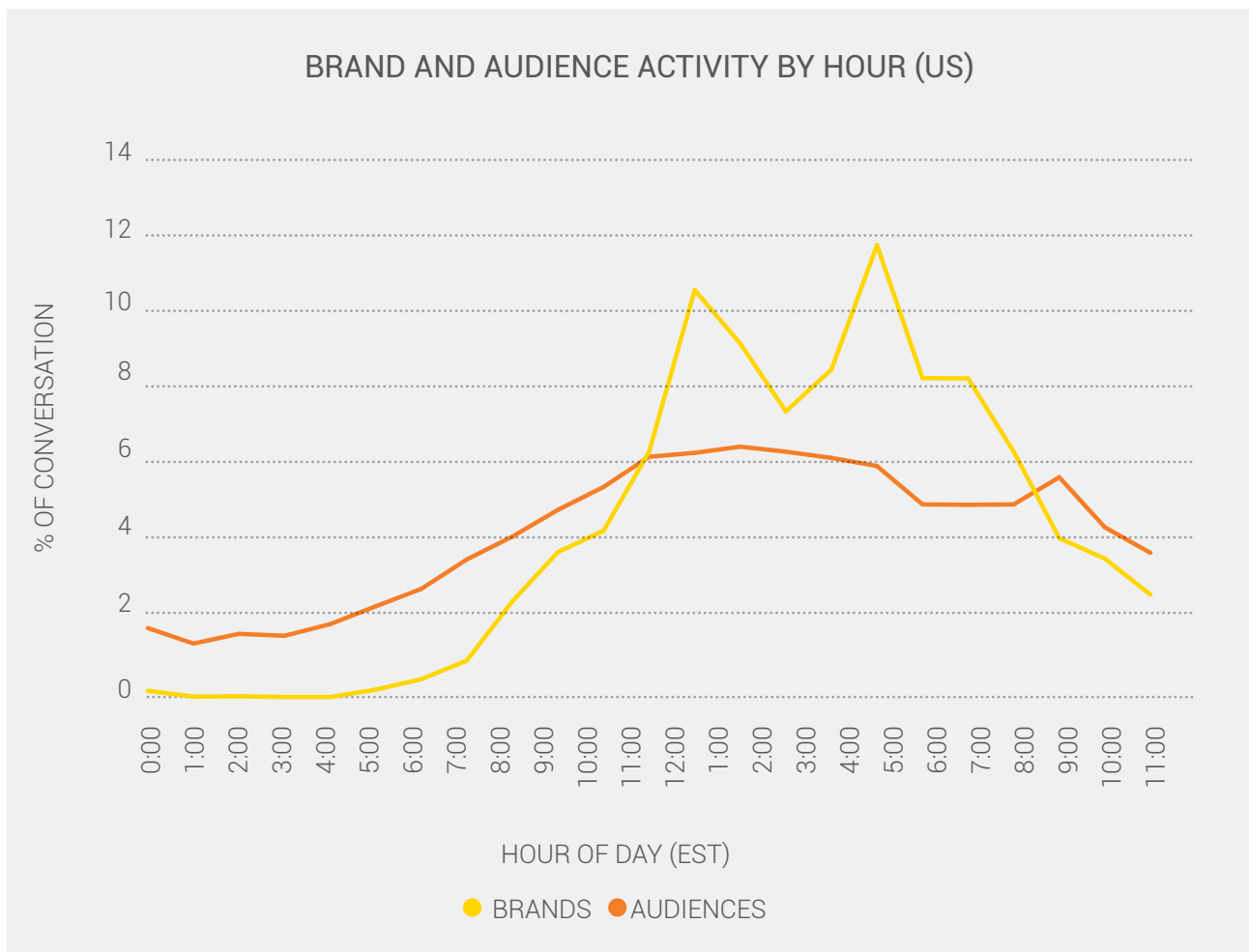


Figure 6: Analyzes 582,417 tweets from September 9th – October 30th, 2015. Conversations restricted to United States.

American brands experience spikes in activity at 12:00pm and 4:00pm and a dramatic silence from 12:00am - 6:00am. Meanwhile, their audience's activity is more consistent throughout the day, with a less distinct trough around 1:00am and peak around 1:00pm.

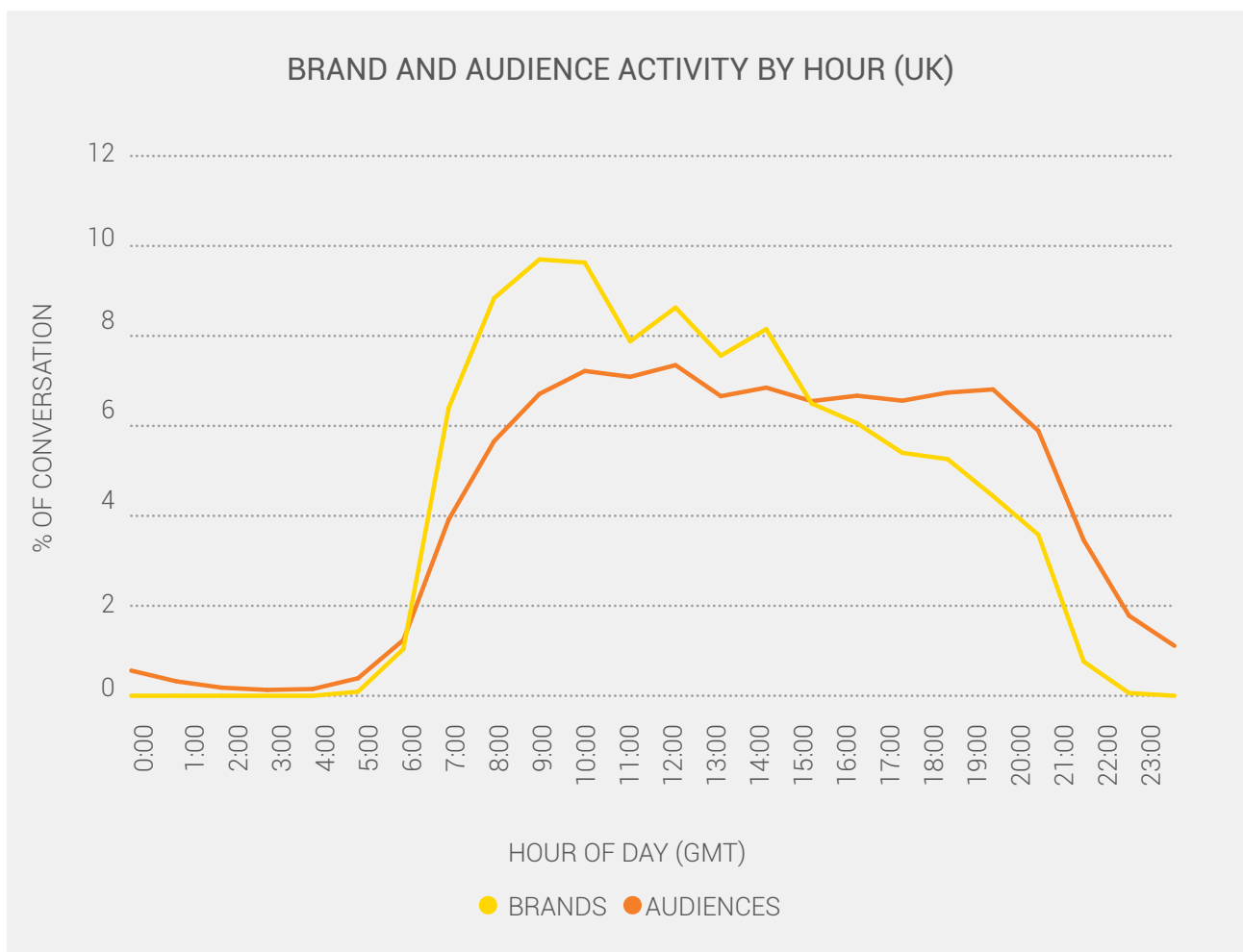


Figure 7: Analyzes 386,636 from September 9th – October 30th, 2015. Conversations restricted to the United Kingdom.

UK brands are most active in the morning, with a sharp rise around 7:00am and a peak from 8:00am – 9:00am. On the other hand, their audiences are consistently active during regular waking hours.

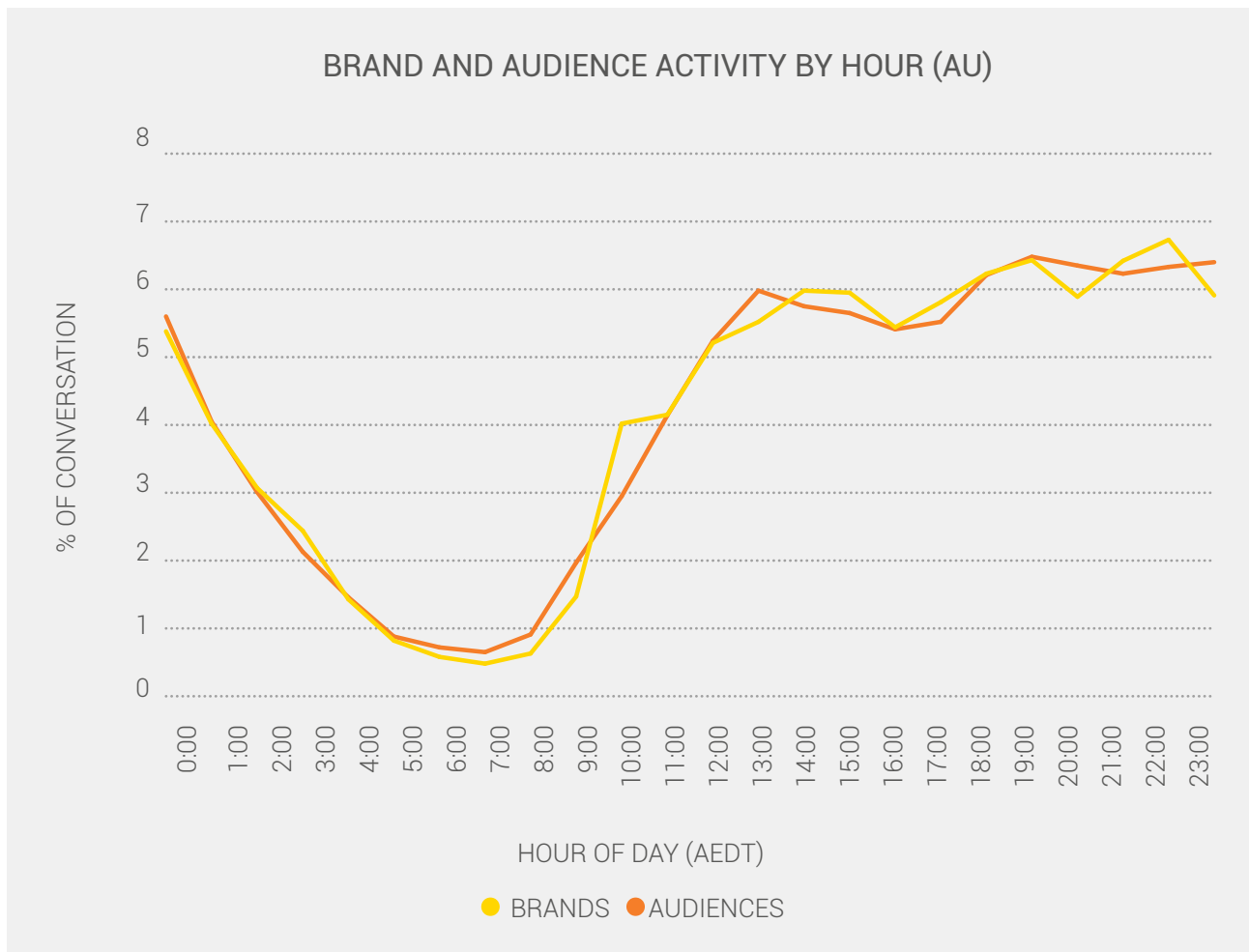


Figure 8: Analyzes 51,349 tweets from September 9th – October 30th, 2015. Conversations Restricted to Australia.

Australian brands are impressively aligned with their audience's hourly activity. Both are most active from 10:00am – 12:00am, with activity hitting its lowest from 5:00am – 8:00am.

Interestingly, the markets with more mature social media audiences have a greater deviance between the timing of audience and brand activity. That may be explained by the fact that US and UK brands receive significantly more mentions than Australian brands do.

4.2 Brand Content

For an industry where customers depend upon an unflinching service or product, effectively delivering the right messaging to customers can be crucial. On social channels, the format of posts often has a dramatic effect on how audiences interact with a brand's content.

Indicative of the various roles that a telecommunication brand's social channels may play, different Facebook post formats earn unique types of responses from followers.

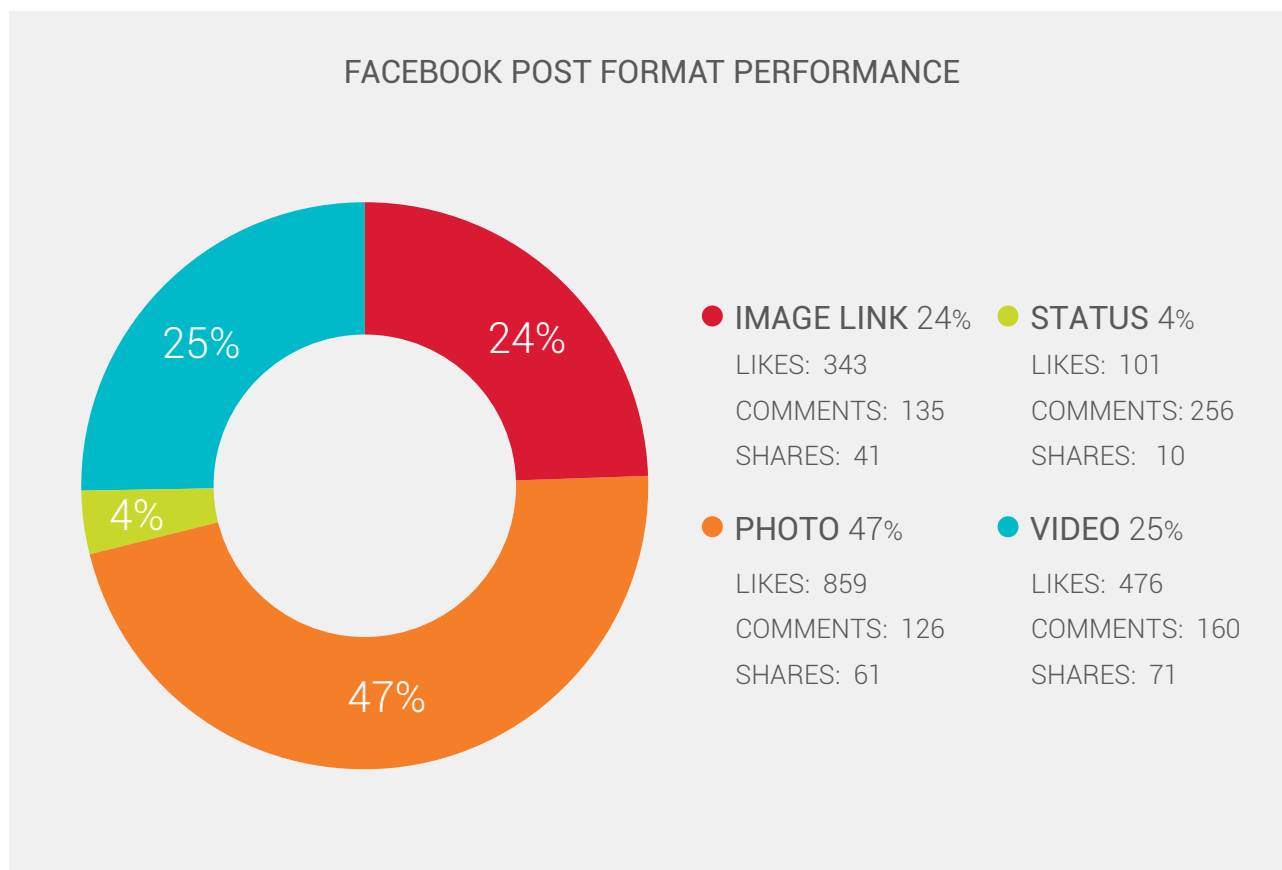


Figure 9: Analyzes 1,031 Facebook posts from telecommunications brands from September 9th – November 9th, 2015.

As is the case for most industries, visual content performs well for telecommunication brands. Photos (48%) earn the most likes on average while Videos (24%) are the most shared form of content.

Statuses (4%), which are generally the lowest performing format for most industries, draw the highest volume of comments for two reasons.

Firstly, many brands use statuses to report malfunctions, which generally draws questions, complaints and other responses from audiences. Secondly, DirecTV frequently uses statuses as a poll, which drove an average of 324.9 comments per status.

5.0 A Look at Telecommunication Audiences

While telecommunication businesses' consumers and online audiences are relatively uniform across brands, there are occasionally events, products or campaigns that drive activity among certain demographic groups.

Social intelligence allows brands to identify the demographic composition surrounding any online topic. That information can help brands in campaign product development, creation and monitoring, crisis management, competitive intelligence and more.

5.1 Gender Analysis

On average, 60% of the conversations directed at telecommunication brands on Twitter come from males. Yet many brands deviate from the industry norm.

Of the 25 brands analyzed, BT (65%), Comcast (58%) and Globe (56%) had the highest percentage of female interest while conversations surrounding Swisscom (77%), TeliaSonera (75%) and Singtel (74%) were predominantly male.

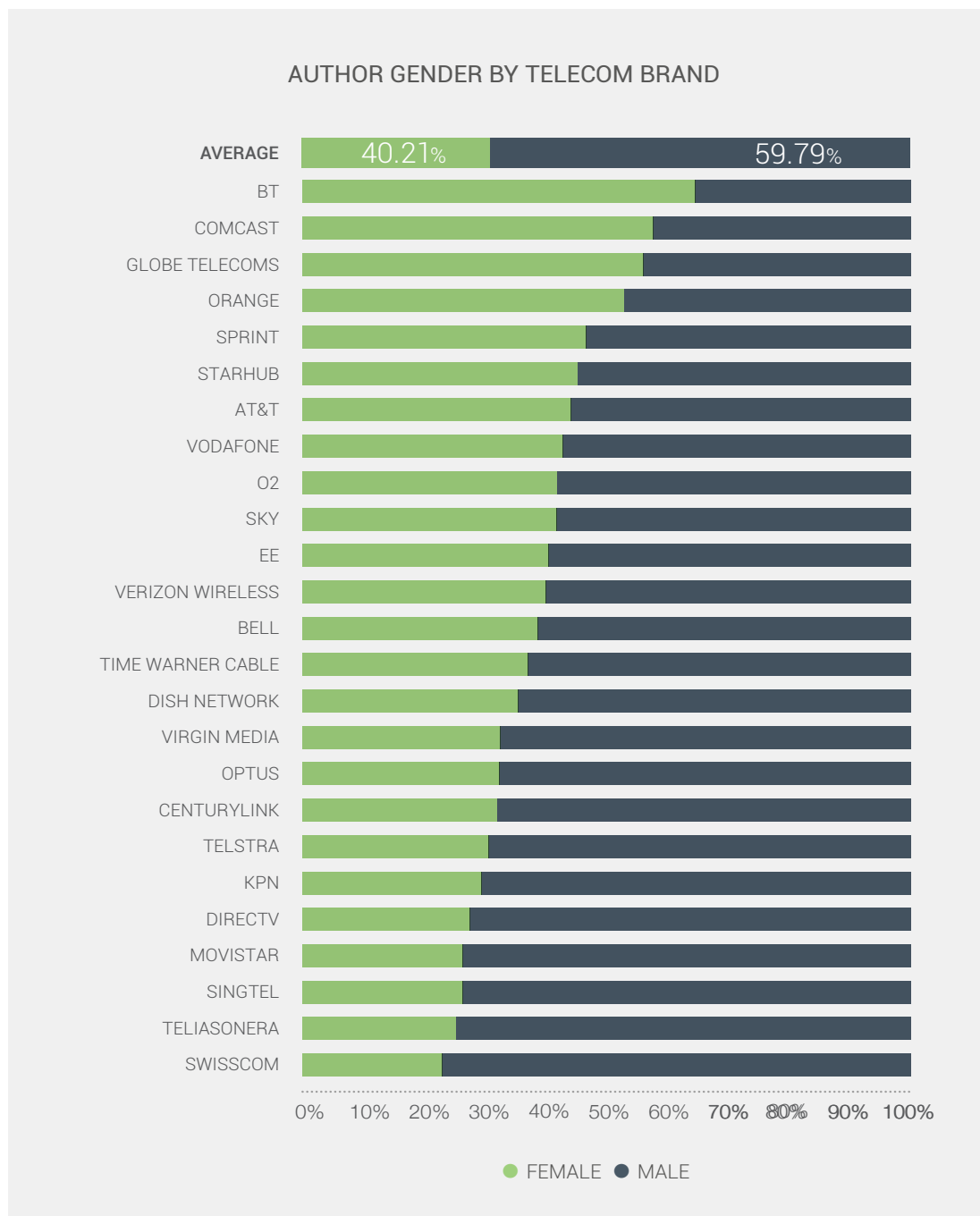


Figure 10: Analyzes the gender of 303,689 Twitter conversations from September 9th – November 5th, 2015. Gender is identified through online profiles and advanced machine learning techniques.

5.2 Interest Analysis

The most prevalent interests among those discussing telecommunication brands is Sports (16%), Family and Parenting (11%) and Music (9%).

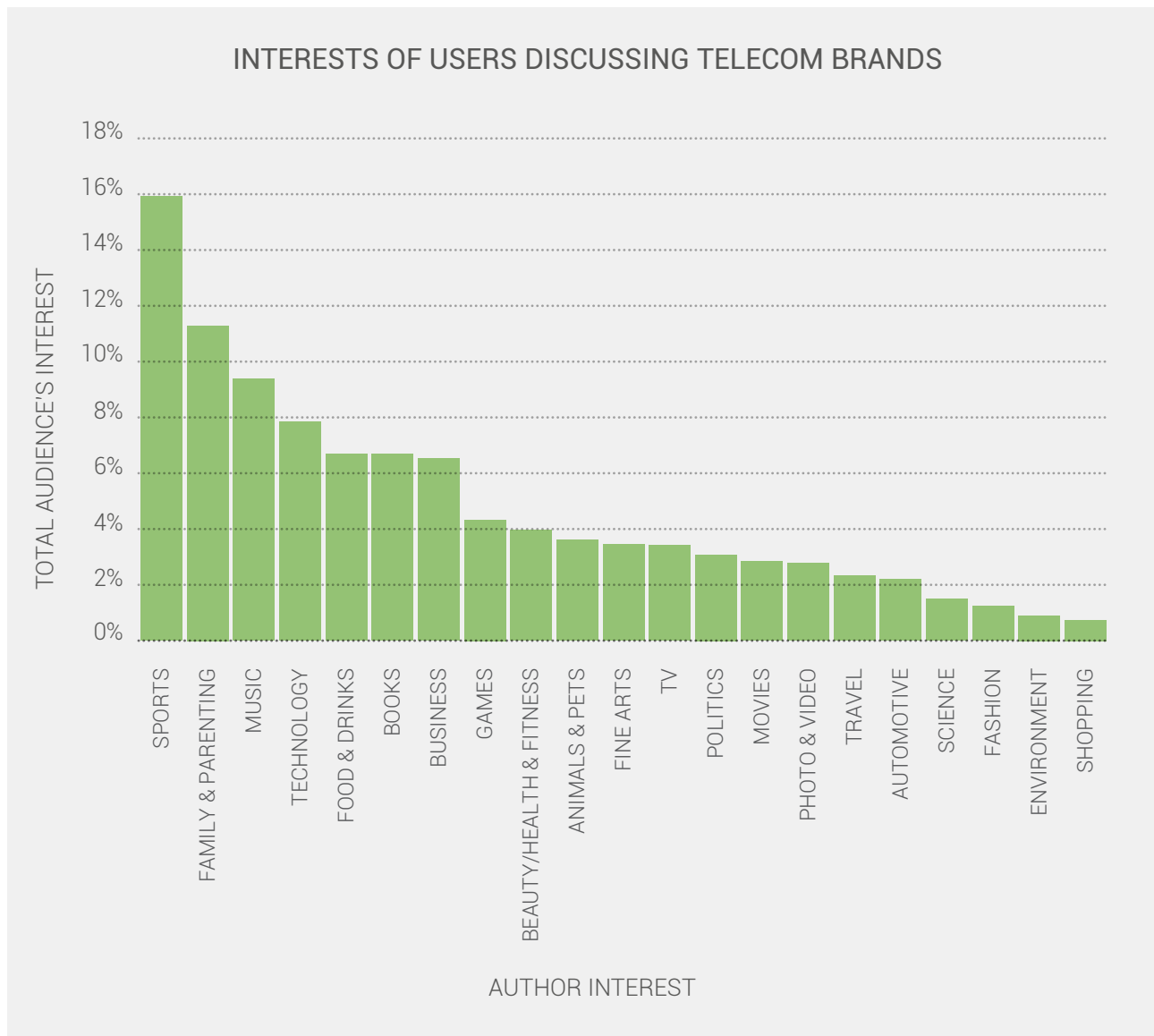


Figure 11: Analyzes the interests of 789,822 Twitter conversations from September 9th – November 9th, 2015. Interests are identified through online profiles and advanced machine learning techniques.

It's unsurprising that Sports is the leading interest, as the start of the NFL season and the MLB World Series drove a significant amount of conversation directed at Comcast, DirecTV, Dish Network and Time Warner Cable. Still, the overview of interests provides some insight on the telecommunication industry's audience.

The following figure analyzes the interests of those tweeting at three telecommunication businesses: AT&T, Comcast and Verizon. Each roughly follow the industry norm except for a few deviations.

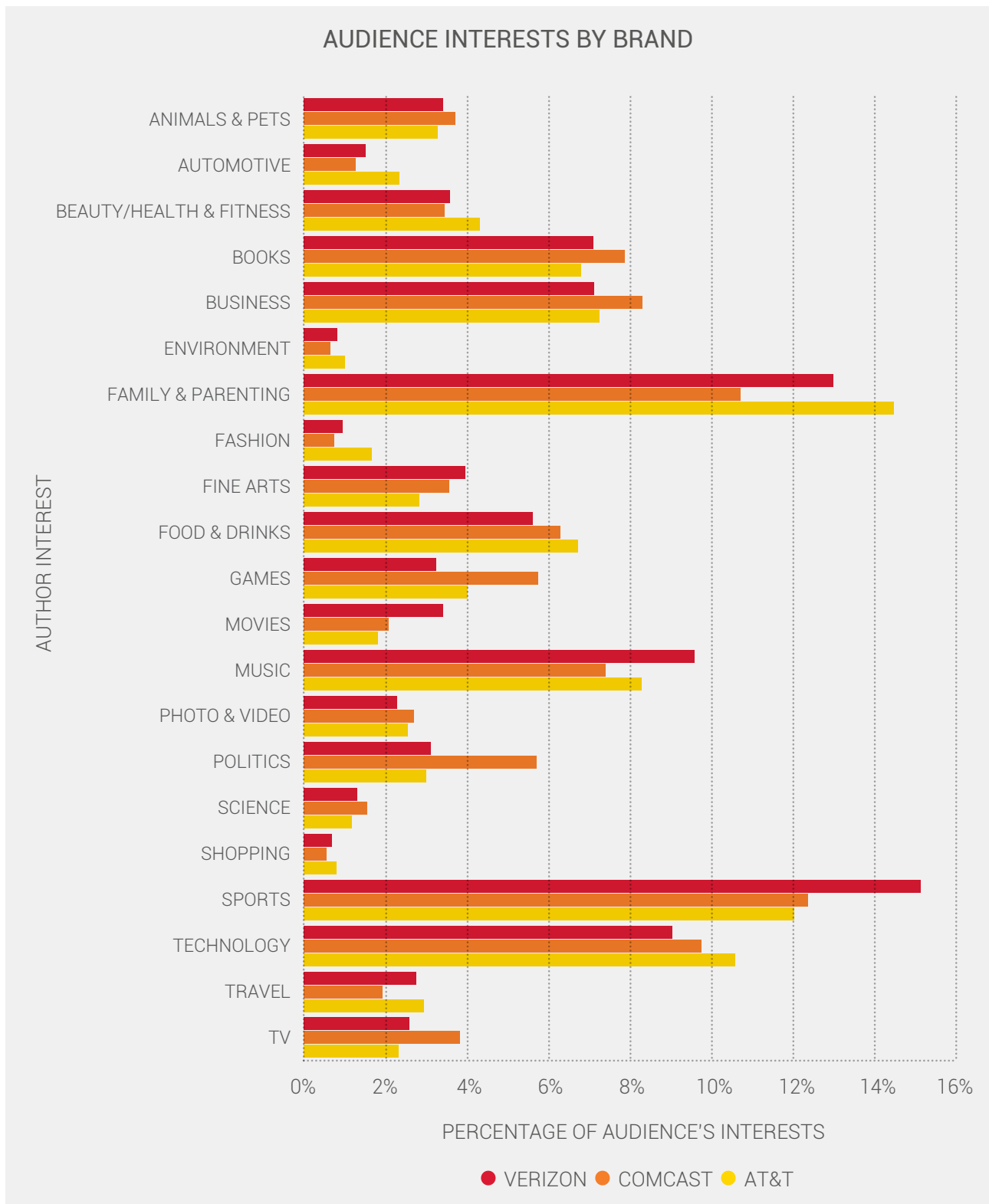


Figure 12: Analyzes the interests of 171,286 Twitter conversations from September 9th – November 9th, 2015. Interests are identified through online profiles and advanced machine learning techniques

Across all three brands, Sports is a less common interest than the industry average (16%) while

Technology is a more common interest than the industry average (8%). For AT&T and Verizon specifically, Family and Parenting is a pronounced interest while Politics and Games is of a relatively high interest within conversations directed at Comcast.

5.3 Profession Analysis

While Artists represented around 25% of the professions contributing to conversations surrounding telecommunication brands, Executives (16%), Students (10%) and Journalists (10%) were also well represented.

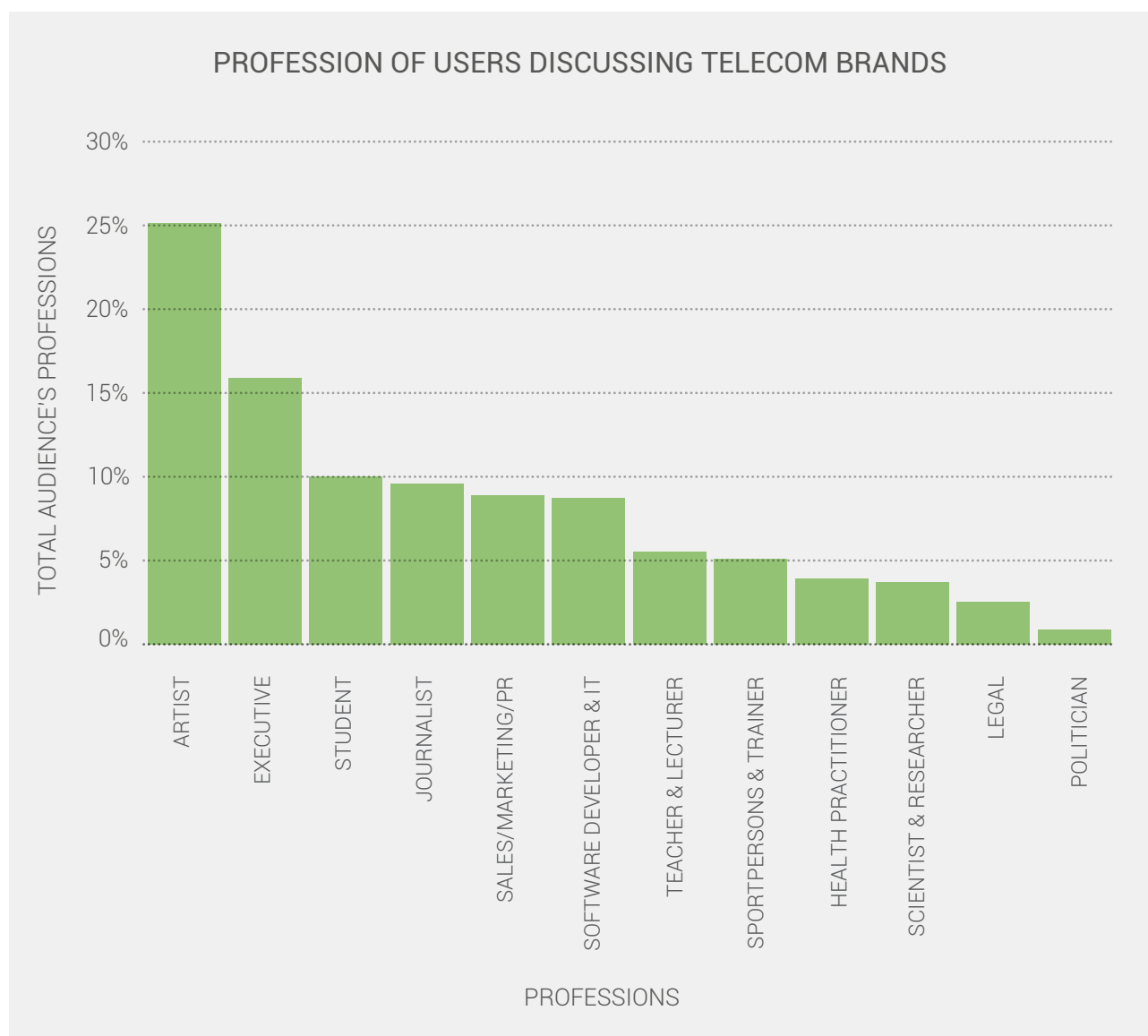


Figure 13: Analyzes the professions of the authors of 170,746 Twitter conversations from September 9th – November 9th, 2015. Profession is identified through online profiles and advanced machine learning techniques.

While an overview of the industry's professions helps brands understand what the average consumer looks like, businesses should acknowledge how the industry average differs from their own audience.

An analysis of the professions driving conversations surrounding AT&T, Comcast and Verizon reveals several discrepancies between the brands and the industry average.

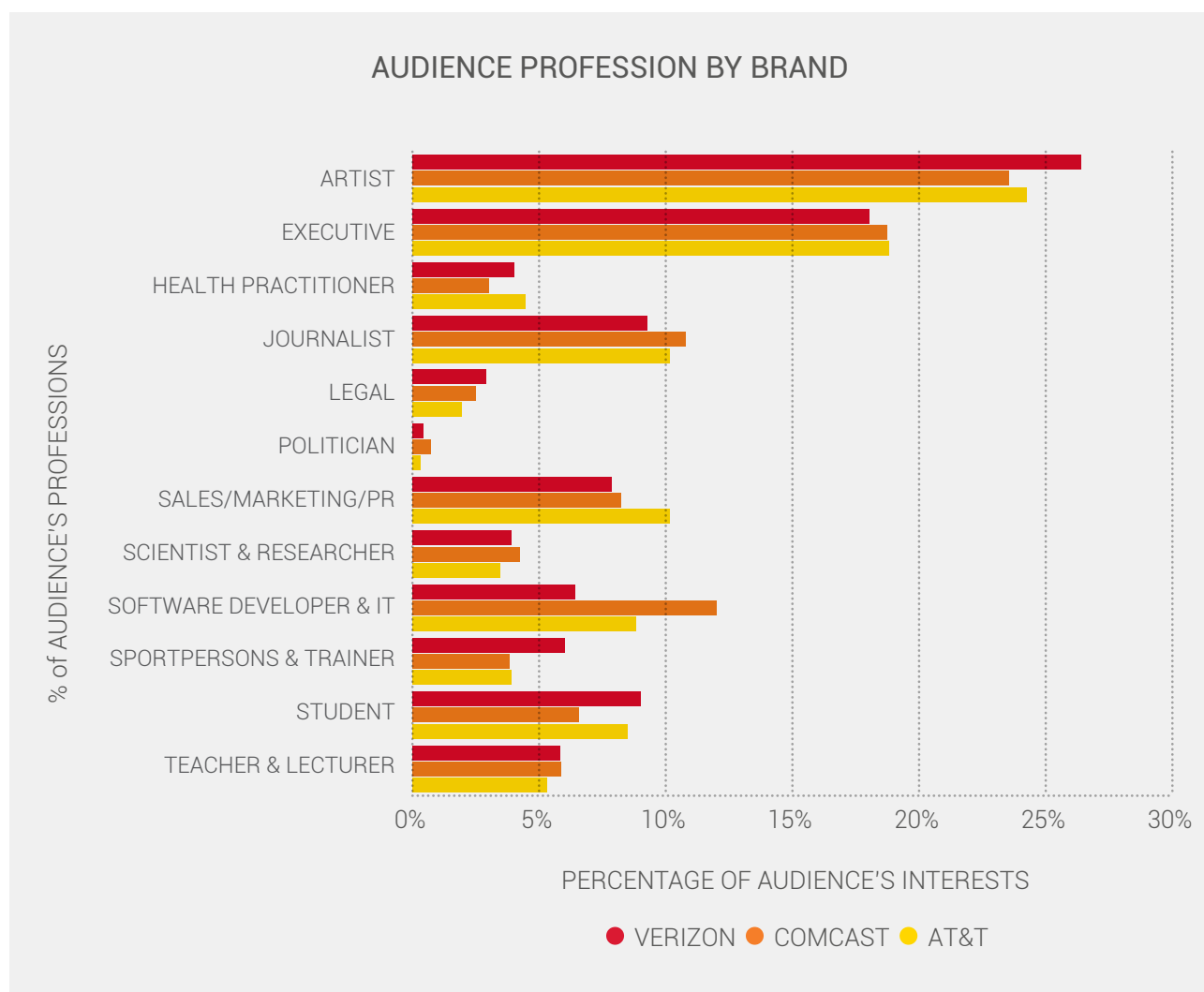


Figure 14: Analyzes the professions of the authors of 38,306 Twitter conversations from September 9th – November 9th, 2015. Profession is identified through online profiles and advanced machine learning techniques.

Notably, the professions of those discussing these three brands leans less toward Students and more toward Executives. For AT&T, Artists are more common contributors while Software Developer and IT professionals are less frequent. Meanwhile, Comcast draws a higher percentage of conversation from those in Software Development and IT than the industry average.

6.0 Customer Service Analysis

For telecommunication businesses, providing superior customer service while minimizing costs is paramount. Social customer service has done both for telecommunications brands.⁷

As such, social care has quickly become the most important application of social media for businesses in the telecommunications industry. An overview of 17 social customer service channels reveals just how effective these channels are.

AN AVERAGE DAY ON TWITTER			
TELECOMMUNICATION BRANDS AVERAGE FOLLOWERS: 100,514		TELECOMMUNICATION AUDIENCES	
TOTAL TWEETS	343.20	TOTAL @MENTIONS	432
REPLIES	336.05	REPLIES	230
RETWEETS	0.05	RETWEETS	8

Figure 15: Analyzes 344,361 tweets from October 26th – November 10th, 2015.

On an average day, these social care channels receive 432 @mentions, of which brands reply 336 times. For @BTCare, an average day consists of 691 replies to 1,223 @mentions.

However, while social customer service is a cost-effective way to handle incoming complaints, it generally functions at an individual level and may not solve the underlying issue. By segmenting incoming complaints into categories or regions, brands are not only better equipped to evaluate the quality of their customer service but also more capable of identifying trends in complaints and proactively resolving systemic issues.

Complaints, while negative reflections of a brand, offer the single most effective feedback for product development and improvement.

⁷McKinsey & Company. Higher satisfaction at lower costs: digitizing customer care. 2014.

The following figure segments tweets directed at social customer service accounts into key topics.

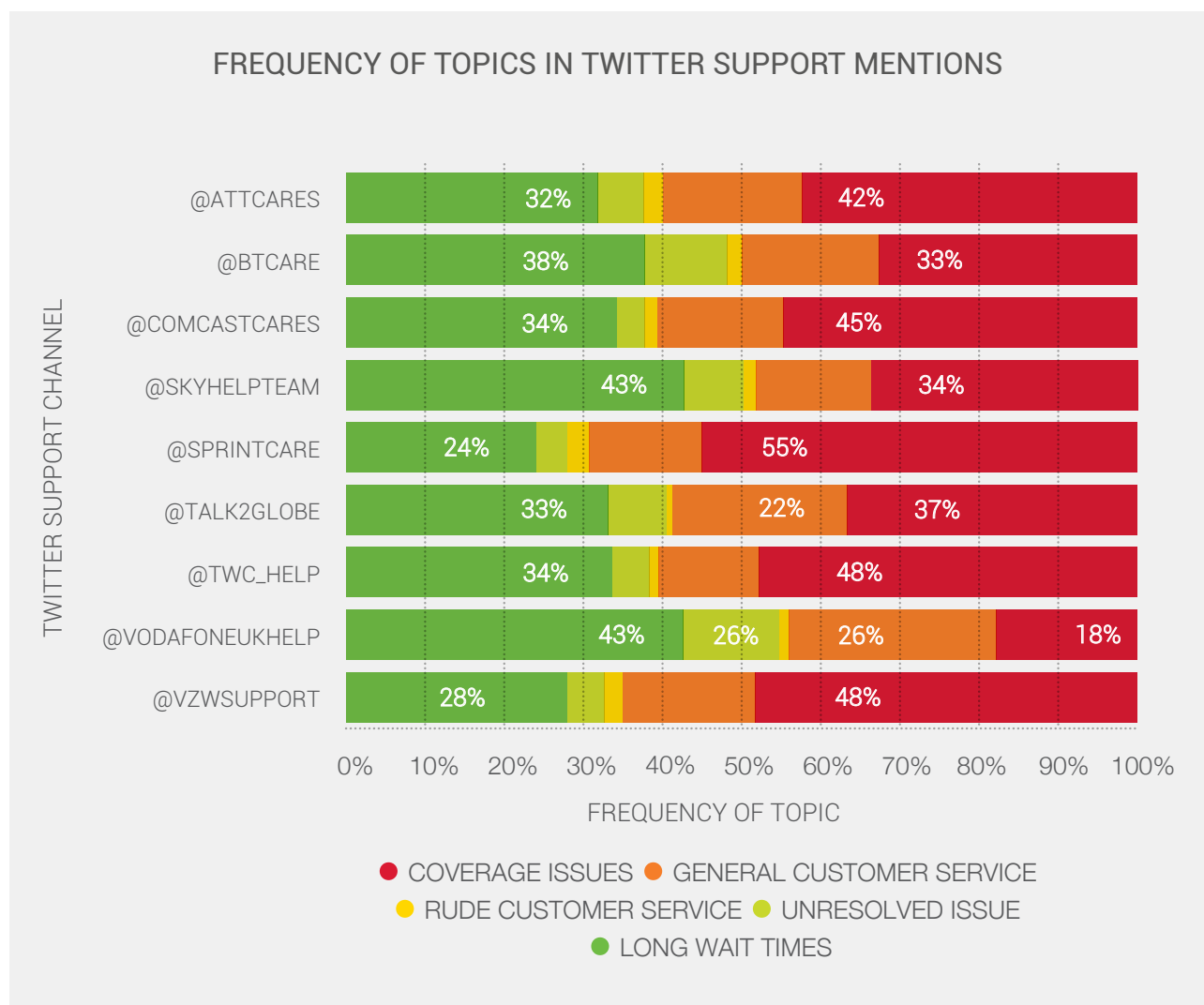


Figure 16: Analyzes 17,443 tweets from October 26th – November 10th, 2015. Customer Service Topics are identified through Brandwatch Rules, which use boolean language to identify terms in a specific context. The analysis excludes conversations from brand-owned accounts. General Customer Service refers to mentions of customer service representatives, phone care and other general mentions of the brand's customer service.

The analysis reveals the types of issues that are mentioned most frequently. While 55% of Sprint's categorized complaints are around the quality of their coverage, Vodafone UK and Sky struggle with customer service wait times.

By segmenting mentions into categories, brands can easily route specific types of complaints to relevant teams and track recurring issues over time.

7.0 An Intent to Switch Services

In a KPMG survey, senior telecommunication executives cited acquiring customers as the best application of data and analytics.⁸

Social media offers the means to both connect with potential customers and track the pulse of consumers expressing an intent to use their service. That way, brands can identify what events or campaigns are actually creating an interest to switch services.

The following figure reveals the volume of Twitter conversations expressing an interest to switch to or start using AT&T, Sprint and Verizon services.

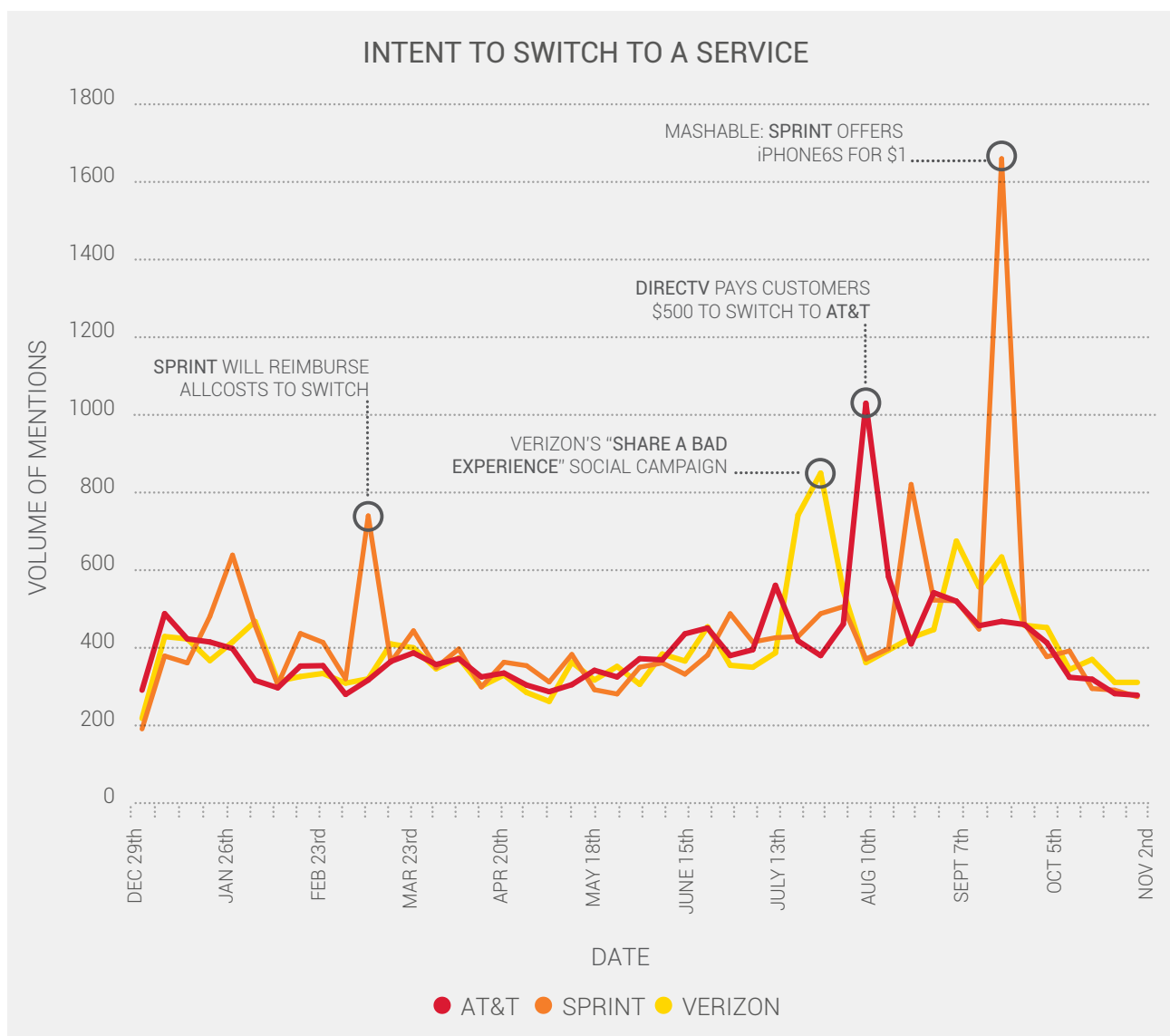


Figure 17: Analyzes 55,662 tweets from January 1st – November 9th, 2015. Intent to Switch is identified through Brandwatch Rules, which use boolean language to identify terms in a specific context. The analysis excludes brand-owned accounts and retweets of conversations expressing Intent to Switch.

⁸KPMG. 2013 Media and Telecommunications Industry Outlook Survey. 2013.

Unsurprisingly, conversations indicating an interest to switch services peak around major offers and campaigns.

Sprint, vying to carve out some of their larger competitors' business, have generated the most buzz around switching to their service through various sales offers. Interestingly, Verizon generated more organic intent to switch to their service than AT&T despite having fewer sales campaigns.

8.0 A Review of Telecommunications

The telecommunications industry has established its proficiency in harnessing social media to provide personable and effective customer service at a low cost. But to really become socially intelligent businesses, they will need to expand their applications of social data to more teams.

Every day, telecommunications brands witness an average of 649 tweets at their branded accounts and 432 tweets directed to their social care accounts. Those conversations present the opportunity to better inform product development, competitive intelligence, campaign planning and measurement, and consumer insights.

Telecommunication businesses have both the need and ability to implement robust social intelligence programs.

Operating in a relatively data literate industry, they are well equipped to understand and capitalize on the wealth of organic feedback that social offers. Additionally, many industry leaders recognize that data analytics can support numerous departments across the business.

The next few years will likely mark a defining transition as telecommunication business evolve from capable social care providers to socially intelligent businesses.

Key Insights

- Despite receiving an average of 649 @mentions per day, telecommunications businesses maintain 20% of the conversation around their brand.
- Businesses' activity aligns with their audience's except during weekends and, for American brands, during non-work hours.
- On Facebook, photos are the most successful form of content in terms of likes and shares, while statuses drive the highest volume of comments.
- Of telecommunication brands' online audiences, 60% are Male, 25% are Artists and 16% are interested in Sports.
- The majority of complaints directed at social care Twitter channels are regarding Coverage Issues and Long Wait Times.
- Sprint has driven more campaigns and intent around switching to their service than AT&T or Verizon have.

9.0 Glossary

Terms

@Mention: A Twitter mention directed at an account using the "@" symbol.

Audience: Refers to the general group that brand's target or interact with. An audience member may not be a follower but a follower will be an audience member.

Earned Conversation: Conversation from the general public that is directed at a brand.

Facebook Channels: A data stream that collects conversations directed at a specific Facebook account.

Followers: Refers to those that follow a brand's social channels.

Mention: Refers to any online conversation retrieved by a Query or Channel.

Owned Conversation: Conversation coming from a brand's owned accounts.

Queries: A data stream that collects general mentions of a brand from various online websites using Boolean language.

Share of Buzz: Indicates the amount of conversation one brand or topic has within the context of an industry or category.

Share of Voice: Indicates the amount of conversation one brand or topic has within the context of an industry or category.

Twitter Channels: Facebook Channels: A data stream that collects conversations directed at a specific Twitter account.

Calculations

Gender: Gender is calculated by matching the first name in someone's Twitter info to a dictionary of over 40,000 names, which are then used to assign a Gender. If an author has an ambiguous name (i.e. could be male or female) or one that does not match, we will not assign a Gender.

Interest: Interests are calculated by using a range of complex rules (similar to how Sentiment is calculated). These match specific keywords and phrases in the user's Twitter bio in order to assign Interest categories to an Author. If an Author has no Interests listed in their bio, they will not be assigned any. An Author can be assigned multiple Interests.

Profession: Profession is calculated by using a range of complex rules. These rules match specific keywords and phrases in the the Twitter bio in order to assign a Profession category to an Author. If no Profession can be found for an Author, a Profession will not be assigned. An Author can be assigned multiple Professions.

10.0 About Brandwatch

Brandwatch is the world's leading social intelligence company. Brandwatch Analytics and Vizia products fuel smarter decision making around the world.

The Brandwatch Analytics platform gathers millions of online conversations every day and provides users with the tools to analyze them, empowering the world's most admired brands and agencies to make insightful, data-driven business decisions. Vizia distributes visually-engaging insights to the physical places where the action happens.

The Brandwatch platform, ranked highest in customer satisfaction by G2Crowd in the Spring 2015 social media monitoring report, is used by over 1,200 brands and agencies, including Cisco, Whirlpool, British Airways, Sony Music, and Dell. Brandwatch continues on its impressive business trajectory, with more than 50 percent of revenues now from North America and strong tech industry backing from venture capitalists including Partech Ventures, Highland Europe, Nauta Capital, Gorkana and independent investors.

Brandwatch. Now You Know

