



Social Advertising Best Practice Guidelines

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Introduction

The rapid take up of social networking has changed the way people communicate and how brands engage with their target audience.

Over 65% of Australian internet users have a presence on social media sites*. Although the uptake for business has been slower with currently 50%* of large corporations being involved in social media, it is one of the main areas of digital industry growth with 71%* of marketers saying they will increase their participation in social media over the coming years.

Social media is now an integral part of the overall marketing communications mix: as a powerful tool to engage and converse directly with customers, it is becoming a central part of many organisations' toolkits.

*Source: Forrester/ Nielsen Netview - March 2012

Purpose

For many organisations, the pace of change in social media and specifically in social advertising products has made it challenging to set clear campaign objectives and achieve measurable outcomes.

In publishing this best practice paper IAB Australia, via its standards and guidelines council, seeks to provide information, structure and clarity on social media as a marketing vehicle.

A useful way to plan and execute a campaign that includes social media is a widely adopted marketing framework called the Paid, Owned and Earned (POE) media framework. It provides clear categorisations for the wide range of marketing initiatives that can make up a marketing campaign. It is defined in more detail in the next section.

This best practice paper will explain how the entire POE framework works but given IAB Australia's primary focus on interactive advertising, the focus will be on social media in the Paid environment i.e. social advertising.

This document is intended for agencies, marketers and service providers delivering social advertising who already have a basic knowledge of digital media.

POE Media Framework

The Paid, Owned and Earned (POE) media framework enables marketers to strategically analyse their marketing communications mix and to make decisions on how to best allocate their resources, by taking into account the social context.

It comprises of:

- **Paid (or Bought) Media** – Media where a financial investment is made to place a marketing message. Examples include paid search, social ads, display ads, TVC's, print and outdoor.
- **Owned Media** – Media that is owned and controlled by a brand. Examples include social pages, mobile apps, websites, retail outlets, brochures and products.
- **Earned Media** – Media that is driven by consumers sharing, conversations and engagement. It is usually a result of a brand's owned and paid media efforts, however it should not be considered as part of an advertisement. Earned media has always existed in the form of traditional word of mouth but today, online tools such as social networks and blogs have amplified the scale and enhanced the measurability of earned media.

The key to the POE media framework is to understand the way all the elements work together and how an integrated plan is the best way to ensure marketing effectiveness. The table on the next page illustrates the POE media framework.

Media Type	Paid	Owned	Earned
Definition	Media the brand pays for	Media the brand controls	Media the brand can't control but is delivered by customers and influencers as a result of the brand's efforts in Paid and Owned
General examples	Display ads Paid search Sponsorships TVC's Print Radio Outdoor	Websites Mobile apps Retail outlets Products	Word Of Mouth Conversations Viral Shares Recommendations Reviews
Socially enabled examples	Sponsored blog posts Social network ads Socially enabled display ads Sponsored social media updates In game ads Video seeding	Social pages Blogs	
Role	To deliver brand messages that can feed Owned and create Earned Media	To build brand assets to grow relationships with existing and potential customers and to create Earned Media	To increase brand awareness and to build credibility, consideration or recognition to ultimately drive sales conversion

Examples of Paid Social Advertising

Sponsored Blog Posts



Source: My Poppet <http://mypoppet.blogspot.com.au/>

Definition: When a company pays a blogger (cash or in kind) to blog about their product or service. This is different to an advertorial since the blogger is paid to write the content as opposed to the sponsor creating the message.

Best Practice:

- Sponsored blog posts should be identified as a sponsored feature
- The client should brief the bloggers about the product being covered in the post, but the blogger should maintain independence over the final content and positive or negative feedback
- The client should set clear expectations with the blogger about whether they need to review reactions and/or comments on the sponsored post

Social Network Ads (Facebook Ads, LinkedIn Ads, Sponsored Tweets)

The image shows two social media interfaces. On the left is a Facebook page with a 'Sponsored' section. The ad features a video thumbnail for 'The Dictator Australia' and text stating 'Mark Cowan, Olly Wilton and Andrew Knowles like The Dictator Australia.' Below the video is a 'Like this Page' button. On the right is a LinkedIn profile page. It includes a 'People You May Know' section with three suggestions, a 'LinkedIn Groups' section featuring the 'msdn' group (highlighted with a red box), and a 'Who's Viewed Your Profile?' section showing 9 views in the last 15 days and 10 views in search results in the last 3 days.

The image shows a Twitter timeline. At the top is a search bar with the text 'What's happening?'. Below the search bar are navigation tabs for 'Timeline', '@SMN_Australia', 'Activity', 'Searches', and 'Lists'. The main content is a tweet from 'VirginAustralia' (Virgin Australia) with 11 retweets. The tweet text reads: 'Happy Summer! Ready for your next holiday? We have fares ex Sydney from \$79. Click here for details: budurl.com/94d3'. The tweet is marked as 'Promoted by Virgin Australia' and has a 'Dismiss' button.

Definition: Advertising bought within a social network that is displayed within the network. A sponsored ad can also have an interactive component (e.g. poll, RSVP to attend an event, hashtag) and some of these ads can be integrated within newsfeed content.

Best Practice:

- The ads within social networks should be clearly identified as advertising
- The ads should display a call to action
- Ads on social networks can include friends' interactions with the message which supports the call to action.
- Testing multiple creative messages and optimising regularly is recommended

Socially Enabled Display Ads/Image Gallery



Van Huesen social pre roll on the smh.com.au

Definition: Advertising bought on any website, which includes bookmarks and that enables interaction with an advertiser's social pages or the ability to share or react to the content from the ad itself. These ads include IAB standard formats (see iabaaustralia.com.au/standards) as well as non-standard shapes. These types of ads can also be executed in an off line context such as outdoor or print, with downloadable links or calls to action to engage on a social network.

Best Practice:

- Advertisers should ensure that their social pages are updated with content relating to the ads for the duration of the campaign
- Pre-formatted messages (Facebook shares, tweets including hashtags) should be pre-loaded within the social bookmarking features in the ads
- Advertisers should also consider the extent to which they want to actively moderate and community manage the campaign to minimise any reputational risks

Sponsored Social Media Updates

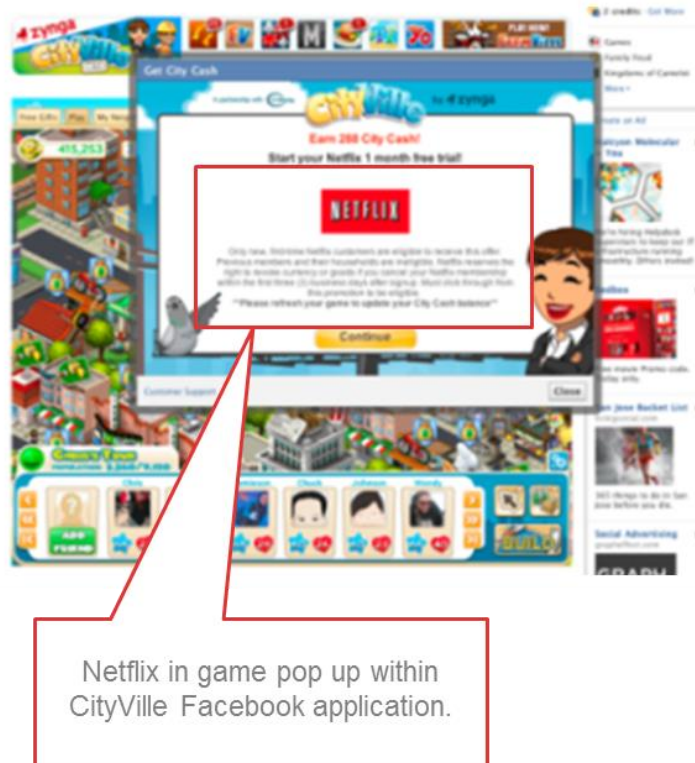


Definition: An update on a social media network which has been paid for by a separate company in order to leverage the audience of that page. For example, a soft drink brand might pay a sports team to do an update on their Facebook page promoting their product.

Best Practice:

- This should be identified as a sponsored update on social media, with the word “sponsored”, “paid” or “client” added at the end of the post e.g. sponsored post, sponsored story

Game Ads



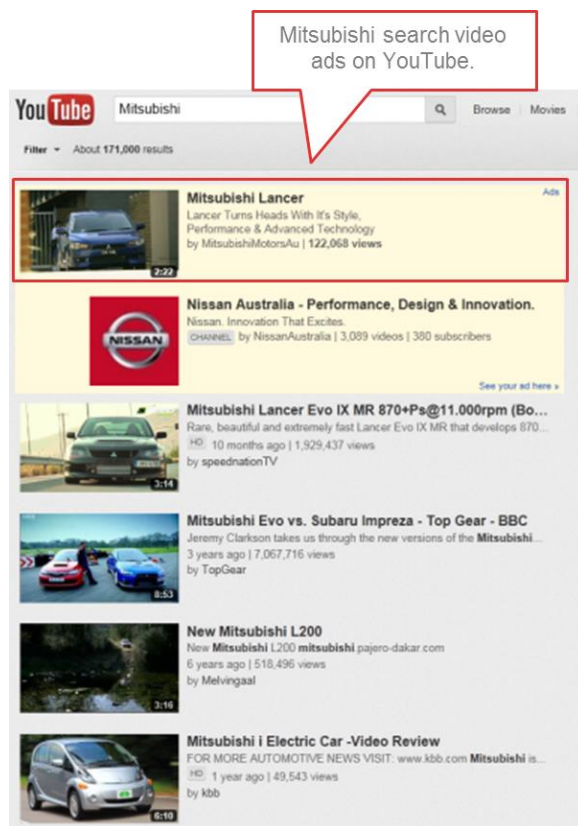
Netflix in game pop up within CityVille Facebook application.

Definition: Paid advertising within a social game (e.g. Farmville). Users have to interact with an online ad (click, enter a competition, register, watch a video) in order to earn more credits within that particular game. Usually once an action has been completed, the user returns to their game with the additional credits.

Best Practice:

- The buying model is often Cost Per Action, where the client only pays once a user completes a particular action
- This type of ad is recommended for acquisition and lead generation campaigns
- The product should be closely aligned to the game and the reward should be great enough that the users do not mind the interruption to their game

Video Seeding



Definition: Paid advertising, where a video is seeded across the internet in order to drive the number of overall views of that content. It is usually bought on a cost per view basis and advertisers often use this at the start of a campaign when it has a small number of views. It differs from organic viral (earned) views and video pre-rolls.

Best Practice:

- Video content can be seeded in a number of ways with examples including but not limited to sponsored YouTube videos, sponsored blog posts, Google sponsored video links or keyword tagging
- Video seeding is now a common way to launch a new piece of content, gain momentum and increase the possibility of the content spreading organically
- Make sure the ads are well branded (branding and messaging should be readily apparent)
- Keep the brand constant when using companion ads
- Make your ads enjoyable and entertaining

- Online video allows consumers to have an interactive experience with their brand, make the most of it
- Make sure that content is synergistic with offline marketing efforts
- Engage and establish relevance quickly throughout the video
- Make sure that what is being advertised in the video is clear
- Keep in mind that many viewers may not have the audio turned on — do not rely on a catchy jingle or song to solely communicate your brand message

Social Media Planning Process

Overview

Through this Best Practice guide, IAB Australia seeks to provide guidance on the social media planning process to enable organisations undertaking a social media initiative to optimise results and achieve their objectives. When commencing a social media initiative, adequate time and attention should be planned out for briefing, planning, buying and monitoring.

Detailed guidance is provided for the following key stages of a social media project:

- Briefing (applies to paid, owned and earned media)
- Strategic planning (applies to paid, owned and earned media)
- Planning and buying (only applies to paid media)
- Campaign set up and optimization (only applies to paid media)

Briefing (applies to paid, owned and earned media)

Social media should be briefed as part of the wider media strategy. The social media team should be involved from the beginning and all areas of the campaign should be considered in a social context. Advertisers need to consider what the objective of the social media activity are.

For example:

- Build a community
- Generate conversation
- Increase positive sentiment / decrease negative sentiment
- Shift conversation topic
- Drive engagement
- Thought leadership
- Develop a follower ecosystem

Advertisers should also ask themselves:

- Why social?
- What do we want people to do?
- Why should people care?
- Why would people share?

Strategic Planning (applies to paid, owned and earned media)

The following should be considered when developing a social advertising strategic plan and when planning its execution:

- How does this deliver on the wider campaign objectives?
- Audience insights: what social networks are being used and why?
- What KPIs should be used? How should the success be measured? For example, should Fans / Engagement / Leads / Competition Entries / Conversation / Brand metrics / No followers all be measured?
- What data is to be collected? Who will own and house the data? How will it be used in the future?
- What else is required? For example: Profile set up / Community Management / Custom Applications / Media support / Listening tools / Crisis Management Plan / Follower Ecosystem
- How long will the campaign run for? For social media campaigns, the recommendation is for them to be “Always on”
- Who are the admins / who will be posting content, moderating?
- What is the process of escalation / who and what should be sent to client?
- Who is responsible for managing the community if / when the campaign ends?

Planning and Buying (only applies to paid media)

Social advertising should be planned alongside the broader media campaigns. When planning and buying social advertising, advertisers should consider:

What type of paid media?

- Ads on social networks / socially enabled display ads / social game ads...

How will it be bought?

- Buying type can be either CPM (cost per thousand), CPC (cost per click), CPA (cost per action) or fixed price
- Will it be bought through an IO (insertion order) or self-serve?
- Will a Cost per follower be incurred?

What are the creative requirements?

- What are the formats / versions, delivery deadlines and testing?

Campaign Set Up and Optimisation (only applies to paid media)

The campaign should be trafficked alongside the digital media campaign.

Adservering and tracking

- Is it possible to adserve?
- Should the advertiser be working with creative agency to ensure ads working and are loaded into the adserver?
- Will the ads be driving to an online community or site?
- Is tracking possible?

Reporting

- Regular reports should be pulled from social platforms and combined with digital and social community reports
- Information shown in reports should include media metrics such as reach, Click Through Rates and also social media metrics such as Likes, Shares and Sentiment tracking

Optimisation

- Several creative formats are recommended to allow for optimization. For ads on Facebook, the copy and image can be easily tested and changed.

Measurement Framework

Measuring social media efforts often requires a different approach to the one used for other online channels. Due to its softer nature and viral spread, specific campaign KPIs and a tracking toolkit might need to be employed.

The measurement metrics chosen will depend on the specific goals and stage of the activity. Below is a proposed framework giving a broad overview of how to measure the success of your social advertising efforts.

	KPI	Metrics	How?
REACH	Unique Audience	Initial unique audience reach and second level connections “friends of fans”	Web analytics / third party vendors (e.g.: Facebook Insights / Google Analytics for G+ / Twitter: Bitly)
	Social Page Followers or “likes”		Web analytics / third party vendors (e.g.: Facebook insights / Google Analytics for G+ / Twitter: Bitly)
ENGAUGMENT	Clicks		Ad Sharing / Social Analytics
	Shares	“Recommendations”, “Shares”, “Re Tweets”, “Embed”	Ad Sharing / Social Analytics
	Post View Activity	Views or Page Visit	Ad Sharing / Social Analytics
AMPLIFICATION	Conversation	Comments, Topics, Sentiments (positive, negative, neutral)	Social Listening
	Influence	Thread of Conversation	Social Listening
ROI	Branding	Brand Recall	Brand Survey
	Sales	Sales Uplift	Client Sales Tracking
	Intention to Purchase	Intention to Purchase	Survey

Note: There is no central point of data. Information can be pulled and aggregated from social touch points. If you need more information speak to your experts.

Consumer Policies for Social Ads

The following section outlines recommendations around opt-in and opt-out policies when creating and delivering social ads.

Opt-in Recommendations

Profile Creation

From initial profile creation to ongoing usage of this data, it is important for consumers to have a complete understanding of what, how, when, and to whom their data or likeness will be used for delivering social ads.

Upon initial creation of a profile within a social media site, consumers should be given the option to share their information for social ads within the actual domain they are joining and potentially outside of that social network as well. Beyond this general opt-in for social ads, consumers should also have the ability to opt-in to sharing information with friends and different networks of friends they are connected with.

Ad Preview

When incorporating consumer profile data into social ads, advertisers will need to show consumers exactly how their likeness or information will be used within a preview of the ad itself. This preview should be available to the consumer prior to the ad's actual distribution within the social media site. Additionally, consumers should be able to select what groups of friends will see the ad or opt-in to having the ad served to their entire network. There must be an explicit approval of the ad by the consumer prior to its distribution. Optionally, a consumer may waive future notices with an auto opt-in function, where consent to share information is assumed on a go-forward basis unless otherwise stated through an opt-out action.

Benefit Statements

As privacy concerns regarding social advertising continue to dominate much of the press, it is important for publishers to also provide strong benefit statements to their consumers so that consumers understand why targeted relevant advertising will be beneficial to them. Some potential benefits to highlight are:

- The ability to receive offers and information about goods and services relevant to your interests, affinities, or friends
- The control to minimise the serving of irrelevant ads
- The ability to discover new products and services directly from your friends, networks, and credible authors
- The ability to access free content on the Web that is supported by paid advertising, including social advertising

Opt-out Recommendations:

When an online ad is delivered to consumers, they typically have no idea who is delivering the ad. It is therefore important that consumers are provided with a specific notice regarding how their information is being used to deliver the ad, including who is serving the ad, how the consumer's information is being used to deliver the ad, and providing the ability for the consumer to opt-out of having his / her information used in the delivery of ads from the identified vendor.

Good examples of opt-in and opt-out languages are available here:

- Google Ad Preferences Manager: <http://tinyurl.com/dgmcek>
- Google Privacy Center: <https://www.google.com.au/intl/en/policies/privacy/ads/>
- Facebook Connect:
http://wiki.developers.facebook.com/index.php/Facebook_Connect_Policies
- Your Online Choices website – online behavioural advertising controls:
<http://www.youronlinechoices.com.au/opt-out>

Legal and Regulatory Considerations

When executing social media initiatives, it is important that all legal guidelines including relevant local legislation as well as specific guidelines within social media channels are followed.

Legislation – Privacy / Spam

Respect all laws and regulations in relation to privacy (Privacy Act 1988), spam (Spam Act 2003), and other applicable laws relevant to the industry or products/services.

Data Ownership

Social sites may have different policies around data ownership, check each site's terms of use and privacy policy to determine who owns consumer data and how it can / can't be used by the advertiser.

Potential Legal Liability

Current legal opinion is that publishers are not responsible for user generated comments on social platforms such as Facebook until such time as they are notified of abusive comments and have an opportunity to further investigate and take any appropriate action. Advertisers should consult with their legal advisor and consider which community management strategies they wish to use within their campaigns.

Privacy Guidelines

Social media offers a potentially rich data environment for marketers to better understand online consumers. The collection and use of data through social media sites may not be considered under traditional online privacy policies, creating a potential need for additional privacy policies to govern what and how social data may be used in the context of social advertising.

Privacy guidelines ensure that data collected from consumers is done with consumer consent, that consumers have appropriate notice and choice in what and how their data is used, and that data access and use are consistent with the privacy expectation set with the consumer. Given the profile, social graph, and interaction data that can be collected and used from social sites to deliver social ads, additional privacy policy content may need to be presented to consumers to govern the data capture, data disclosure, and data use.

Organisations should not knowingly collect social and profile data from children under 13 for social advertising or knowingly engage in social advertising directed to children under 13 without obtaining parental consent.

1. Data Capture

Data capture refers to information that is accessed and collected about consumers for use within social ads.

- a) **Opt-in Requirement:** Profile data submitted by consumers within a given social network may be accessed for use within a social ad. It is important that before this data is accessed for use within an ad, the consumer explicitly opts-in or consents to approving their data to be used in the delivery of social ads. This consent may be provided when consumers initially input their profile information when they join a social network, or as part of an option to enable access to their profile information once they have joined the social site.
- b) **Profile Data:** After consumers join a social site, they should be able to view and modify their profile information as well as adjust what data is accessed for use within a social ad. This includes being able to specify whether their picture and name can be accessed by a social ad.

- c) **Third Parties:** If a third party accesses the consumer's social data for the purposes of social advertising, the consumer should be notified of this access and these third parties should not be able to store consumers' profile data independent of the original consumer profile. This provision prevents third parties from accessing and aggregating profile data from consumers. The recommended maximum time a consumer's data should be cached is no longer than 24 hours, and this cache is only in memory, meaning the consumer's profile data should not be stored to disk by third parties.
- d) **Personally Identifiable Information:** If consumers have disclosed any personally identifiable information as part of their profile for the social ad, then the Privacy Act 1988 (Cth) applies. Additional protections such as encryption or hashing methods may be required depending on the sensitivity of the data.

2. Data Disclosure

Data disclosure policies communicate to consumers what data is accessed and how this data is being used. These policies are typically available within a publisher's Privacy Policy and can also be made available on other pages the consumer frequently visits.

- a) **Notice:** First and foremost, consumers should be notified of all data accessed about them and how this data is used. The language should clearly itemise the scope of data accessed about consumers, including any profile data, aggregated data about consumer's interaction with other consumers within their social graph, and / or general interactions with other consumers. Consumers should also be notified when their social data, including associated friends, may be used to target social ads to them and in advertising delivered to them and / or their friends.
- b) **Choice:** Prior to use of consumers' profile data for social ads, consumers should explicitly opt-in and be notified of what profile data will be used for the social ad.
- c) **Profile Data:** As part of the notification policy, consumers should be informed as to how long their profile data may be used for commercial purposes, and how often it may or may not be updated.
- d) **Third Parties:** Any data shared with third parties for social advertising, either in the form of just being accessed or if the third party stores consumer data, should be communicated to consumers.

3. Data Usage

Data usage policies govern the scope of how data should be used that is accessed from the consumer. Any social data about consumers should only be used for social ads targeted to consumers within the social network for which the data was collected, unless the consumer has explicitly opted-in to their data being shared within another domain for social ads.

Examples:

- As an example of content that provides consumers with notice of what and how their profile information is using used, specifically for commercial purposes, refer to Facebook's privacy policy: www.facebook.com/privacy. Note that Facebook's privacy controls also empower consumers to turn off and on what data can be accessed by whom.
- As an example of how to explain a consumer's profile information being used on partner sites, refer to LinkedIn's privacy policy: <https://www.linkedin.com/secure/settings?adv=&goback=%2Eaas>

Additional Guidelines

Many social media platforms have developed their own guidelines and it is advised that they should be adhered to:

Facebook

These two guidelines define what activities a Facebook Page or ad can undertake in relation to design and running promotions or competitions on their network.

Facebook Page Guidelines

https://www.facebook.com/page_guidelines.php

Facebook Advertising Guidelines

https://www.facebook.com/ad_guidelines.php

Twitter

This guideline outlines how to publish tweets externally and includes how to credit the original author of a tweet.

https://support.twitter.com/groups/33-report-a-violation/topics/121-guidelines-best-practices/articles/18311-the-twitter-rules#_about

Google

YouTube

<http://www.youtube.com/yt/advertise/advertiser-playbook.html>

Google+ content policy

<http://www.google.com/intl/en/+/policy/content.html>

Google's privacy policy

<http://www.google.com/intl/en/policies/>

LinkedIn

https://www.linkedin.com/static?key=pop%2Fpop_sas_guidelines

Future Updates

Social advertising is constantly evolving as new platforms and technologies become available and adopted.

This document serves to outline the current common local practices and will be updated on a regular basis as new forms of social advertising emerge.

This document will also include reference to the work of other industry bodies where relevant.

Glossary

This glossary can be used along or independently to the social advertising guidelines; it aims at providing simple definitions to key elements of social advertising. Broader digital advertising definitions can also be found in other IAB documentation: <http://iabaustralia.com.au/Compliance/Glossary>

Blog: An online journal hosted on a personal website for sharing ones thoughts or opinions on topics of interest

Bookmark: A specific destination on the web of particular interest to a user that has been 'marked' in order to return to it

Community Management: The process of fostering and developing a community online, including responding to questions and prompting conversation

Earned Advertising: Advertising that is earned as a result of social discussion around a product or brand, including PR and news coverage of content resulting in amplified awareness at no cost

Fan / Follower: Someone who has opted into receiving 'status updates' from a product or brand on a social network

Forum: An online discussion board where users can express their ideas and views on a particular topic of discussion

Owned Advertising: Advertising that a brand controls which can appear in their site or on their products

Paid Advertising: Digital Advertising that is paid for by an advertiser which can appear inside of a variety of ad units, commonly seen in MRECs and Leaderboards

Social Analytics: Data and information captured about a user on a social network which can measure time on site, the level of content engagement and the total number of friends

Social Gaming: Games or applications played within a social network such as Facebook

Social Graph: Coined by the founder of Facebook; Mark Zuckerberg, a Social Graph is global mapping device that illustrates the connections that a user has within a larger social network i.e. Facebook.

Social Listening: Sentiment tracking within social networks and site to ascertain the overall sentiment towards a brand or product

Social Networking: The process of developing an online network of friends and colleagues via use of social websites such as Facebook, Twitter and LinkedIn

Social Page: A page or presence within a social network managed by a brand for two way interaction

Sponsored Blog Post: A post on the blog of an individual that has been paid for by an advertiser or sponsor

Status Update: An update from a specific individual or brand within a social network, 'updating' their friends on their status

Tagging: The act of identifying someone by name in a post or image within a social network

Video Seeding: The process of posting videos to forums and online communities in order to generate awareness of content

Viral: The rapid social amplification of content amongst users generating mass awareness

Word Of Mouth: The passing of information from one person to another via spoken communication on a specific topic

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