

Can Social Listening Obsolete All Other Research Methodologies?

How we have been stretching social listening use cases

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Introduction

This report showcases how Haleon (formerly GSK Consumer Healthcare), in an effort to stay ahead of the game on deep human understanding, has harnessed the exponential growth of data coming from social media and e-commerce with Semantiweb, a company specialised in social listening. By analysing online conversations, we were able to get insights on consumers' needs, habits, personas and/or portraits, which are critical elements of our innovation framework. Also, by diligently analysing the online ratings and reviews of our products as well as our competitors, we were able to develop a paradigm-shifting approach that is quicker and more cost-efficient than traditional benchmarking studies (quantitative blind product placement), and understand what drives consumers' liking and purchase intent of specific products. The magic happened when Semantiweb's tools unveiled the Haleon consumers behind web-users; the cherry on the cake was that we were able to identify and follow the conversations of key opinion leaders.

The Haleon innovation framework

Haleon (formerly GSK Consumer Healthcare) is a world-leading consumer health company with a clear purpose to deliver better everyday health with humanity. Our leading brands like Sensodyne, Voltaren, Otrivin and Centrum are built on science, innovation and deep human understanding, and are trusted by millions of consumers globally. Our innovation framework places consumers at the centre of every innovation we develop, and no innovation gets the green light to go ahead until our R&D and commercial teams are clear on:

- Who is this innovation for?
- What unmet need is it trying to solve?
- Which products are our target consumers currently using?
- How good is the user experience today, and what drives it? How can we be better?

In order to answer these questions, many traditional qualitative and quantitative methodologies have been at our disposal (see Figure 1).

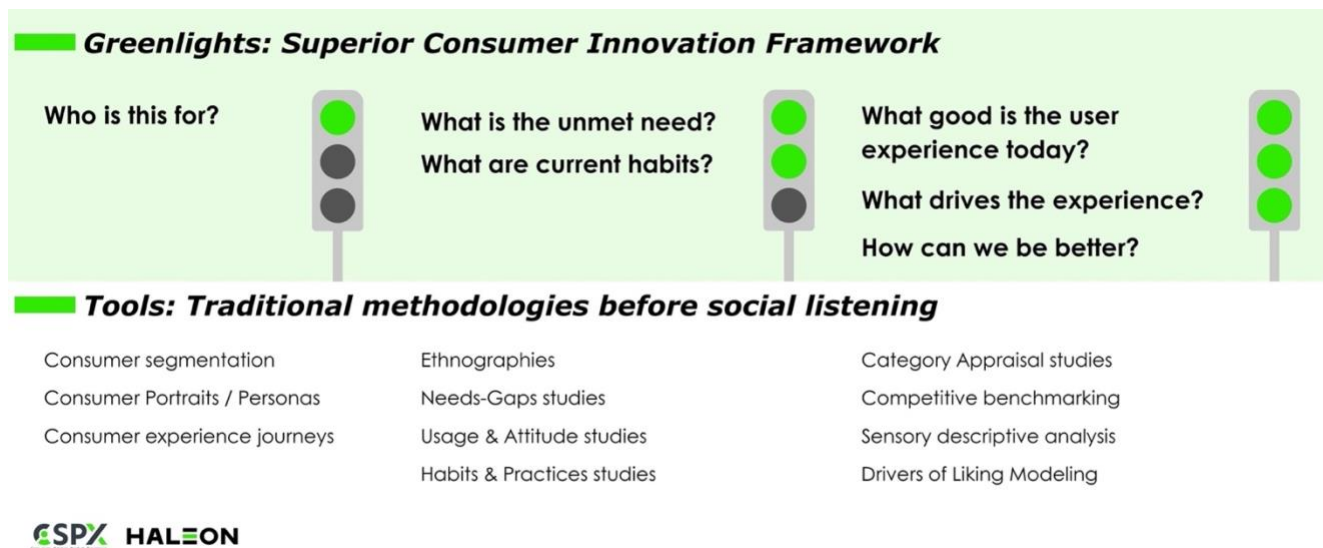


Figure 1: Haleon's innovation framework.

Over the years, these tools have proven very useful. These methodologies often required a qualitative part to understand consumers deeply, followed by a quantitative part to validate the relevance of the findings. As a result, the traditional methodologies were too long and too expensive to be conducted on every single project, and we were on the lookout for cheaper, faster alternatives. A few years ago, as e-commerce channels were becoming a strategic focus, we looked for a partner that had the capability to aggregate and analyse unstructured data coming from online product reviews, treating them as if they were unprompted and/or voluntary comments. We conducted a few pilots, and the one with Semantiweb proved successful thanks to their speed and agility. We started our partnership three years ago, and since then we have built several use cases that demonstrate social listening can indeed obsolete traditional research methodologies.

Key principles guiding our approach to social listening

Social listening is not new, but as it has become omnipresent in conversations about consumer insights, its definition has evolved and opened the way to new approaches, outputs and use cases. Back in the early 2000s, when it was just in its infancy, social listening was mostly used to capture conversations about specific brands or products in almost real-time in order to monitor their e-reputations and help marketing and digital teams react to positive or negative comments. As social networks gained popularity, communication, marketing and consumer insight teams started to use social listening more proactively to assist with longer-term strategic planning. The creation of Semantiweb 12 years ago was guided by four main principles that are still at the core of our current methodology.

1. The monitoring of online conversations is much more insightful if we can understand the web users behind them.
2. Conversations about brands and products are crucial, but they only represent the tip of the iceberg. Indeed, web users love to talk about their daily lives, passions and pain-points. Most of these conversations do not mention specific brands or products, and yet they provide a 360° understanding of who they are, their lifestyles, consumption habits, expectations and unmet need gaps.
3. Real-time monitoring is key to effectively engage with web users, but consumer behaviours also require taking a step back and studying long-term evolutions.

- Artificial intelligence, machine learning and our proprietary algorithms are key to collect, aggregate and structure unstructured data, but we are convinced that human analysis, both quantitative and qualitative, is also vital to unveil consumer insights that will lead to sustainable and successful innovations.

From unstructured conversations to consumer needs, habits and personas

In this case study, we wanted to understand the landscape of pain sufferers in the US: the key types of pains consumers were experiencing (and some indication of the prevalence of each type of pain), what were the causes of the pain, the key treatments used and also generate personas in order to better understand who we would be innovating for, for each type of pain. Personas are a powerful tool to align our internal stakeholders around the targeted users and prioritise efforts. They also help our innovation teams design products that effectively meet the specific needs of these personas. We chose to conduct a social listening and analyse spontaneous online conversations about pain in order to have a very granular and precise understanding of this broad topic. Indeed, these unprompted comments are perfect to unveil new and unexpected findings, and go against some preconceived ideas. Also, the huge volume of available data enabled us to quantify the findings. The first step was to map out the different types of pain mentioned in these spontaneous conversations (see Figure 2).

9 main types of pain with different levels of intensity & frequency

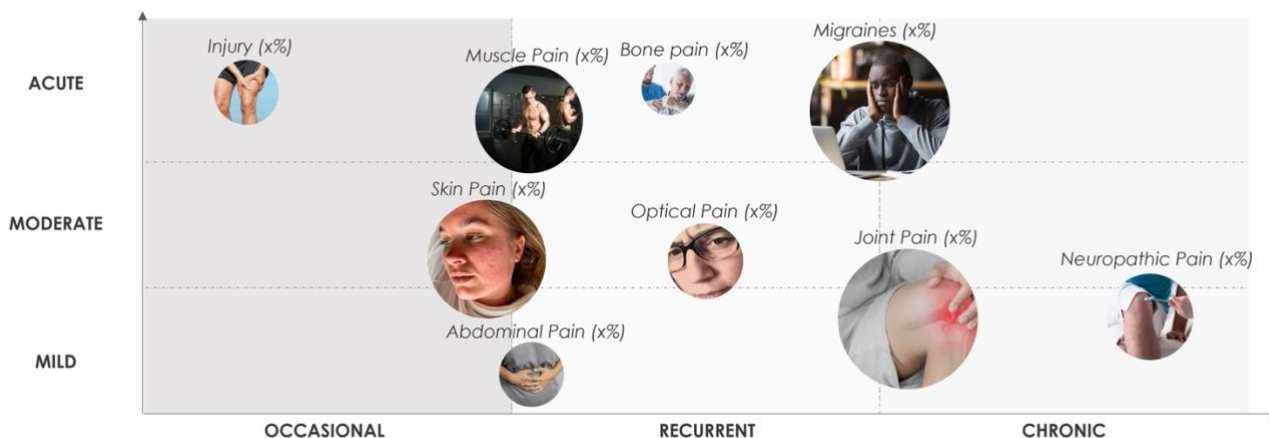
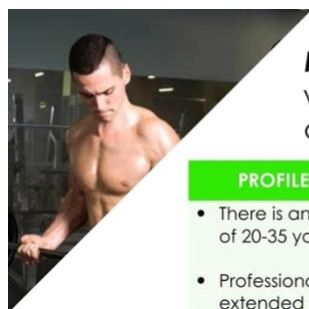


Figure 2: The mapping of the different types of pain.

As a second step, we reviewed the types of pains and further analysed some of these. We analysed the profiles of web users suffering from these types of pain, how they talked about their pain, the affected body areas and the treatments they considered or tried (Rx or OTC medication, as well as holistic treatments such as diet, physical activity, etc.). We also analysed the main sources of influence they mentioned at every step of their journeys (see Figure 3).



Focus on Muscle pain:

web-users mention different types of treatments depending on the root cause of their muscle pain

PROFILE OF WEB-USERS	MOST MENTIONED BODY PARTS	MOST MENTIONED CAUSES	TREATMENTS
<ul style="list-style-type: none"> • There is an overrepresentation of 20-35 yo men • Professionals who sit for extended hours • Professional and amateur athletes • Post-surgery patients 	<ul style="list-style-type: none"> • Back • Leg • Neck • Shoulder 	<ul style="list-style-type: none"> • Lifestyle: <ul style="list-style-type: none"> ◦ Exercising ◦ Walking ◦ Weight gain ◦ Bad posture • Side effects of acne medications (Minocycline, Accutane) and vaccines • Health conditions: <ul style="list-style-type: none"> ◦ Fibromyalgia ◦ Sciatica ◦ Scoliosis ◦ Hernias ◦ Sprained muscles 	<ul style="list-style-type: none"> • OTC medications: <ul style="list-style-type: none"> ◦ Product 1 ◦ Product 2 ◦ Product 3 • Natural ingredients: <ul style="list-style-type: none"> ◦ Ingredient 1 ◦ Ingredient 2 ◦ Ingredient 3 • Therapies: <ul style="list-style-type: none"> ◦ Therapy 1 ◦ Therapy 2 ◦ Therapy 3

Figure 3: Deep dive analysis of a specific type of pain.

We then went further to analyse the profiles of these web users via our algorithms and semantic tags (see Figure 4), which enabled us to understand their profiles, lifestyles, behaviours, expectations, unmet need gaps and preferences.

Let's take the example of a web-users who talks about "Muscle Pain" ...



Muscle Pain

I think I pulled my left deltoid muscles yesterday. There's no bruising so I don't think I tore anything and I still have full range of motion. It hurts though and I'm debating if I should work out today or not.

This web-user may talk about a lot of different topics:
These conversations help understand who this web-user is



Muscle Pain 29 yo Male Health diet Vegan

I think I pulled my left deltoid muscles yesterday. There's no bruising so I don't think I tore anything and I still have full range of motion. It hurts though and I'm debating if I should work out today or not.

I am a healthy 29 year old male. I play sports, work out. I have found that attitude is everything

I eat a healthy diet. Do not smoke or drink alcohol. I also do not drink any soda

I went vegan over a week ago (was vegetarian for years but never ate seafood and minimised dairy products because of intolerance) and gradually reduced the egg products in my diet beforehand.

Figure 4: Semantic tags helped us understand who web users talking about muscle pain are.

Finally, the synthesis of the main quantitative and qualitative findings enabled us to define custom-tailored personas (see Figure 5), which could be used by Haleon's stakeholders taking part in the innovation process.

Meet the “Healthy lifestyle transitioner”

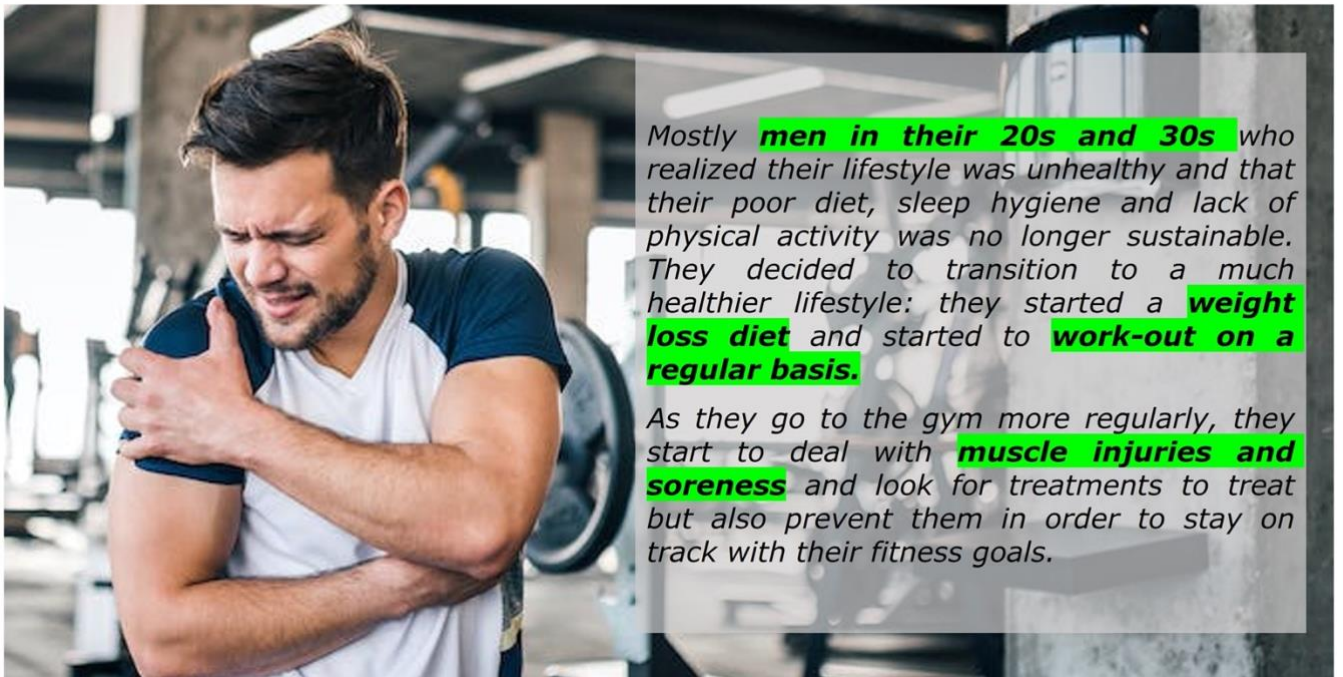


Figure 5: A custom-tailored persona.

Leveraging online reviews to understand users' experiences and the drivers of preference that make superior products

The healthcare industry and the toothpaste category are extremely dynamic: leading brands keep launching new products with enhanced formulations, while new indie brands with direct-to-consumer distribution models and more targeted benefits appear almost every day. Tracking these new launches is fundamental, however, this is anything but a trivial task; even ChatGPT struggles to answer this question (see Figure 6)!

P How many new brands of toothpastes were launched in the USA between January 2023 and April 2023

I apologize, but as an AI language model with a knowledge cutoff in September 2021, I do not have access to real-time data or information on specific events that occurred after that date, including the launch of new toothpaste brands between January 2023 and April 2023. To obtain accurate and up-to-date information about toothpaste brand launches during that period, I recommend referring to market research reports, industry publications, or conducting a search using reliable sources or databases.

Figure 6: Example of a question asked to Chat GPT.

Online reviews started to represent an incredible goldmine, with more than 50% of web users posting reviews at least once a month, with increasingly detailed and insightful comments. We had the intuition that we could leverage online reviews to:

- Identify new players and who our main competitors are;
- Identify the strengths and weaknesses of Haleon's key products;
- Benchmark performances versus key competitors.

The challenge was to harness an ever-expanding flow of unstructured raw data and turn it into actual consumer knowledge. Providing an accurate and unbiased snapshot of consumers' perceptions implied finding a partner able to address different types of skews such as (to name a few): distinguishing reviews about the product experience itself, and reviews about the experience of buying this product (see Figure 7); ensuring that consumers reviewed the correct product and not an expired product or an old version that has been reformulated (see Figure 8), or a product received from another country with a different formula (see Figure 9).



Figure 7: A review praising a product, but giving a 1-star rating.



Figure 8: A review about a product that was already expired when it was received.

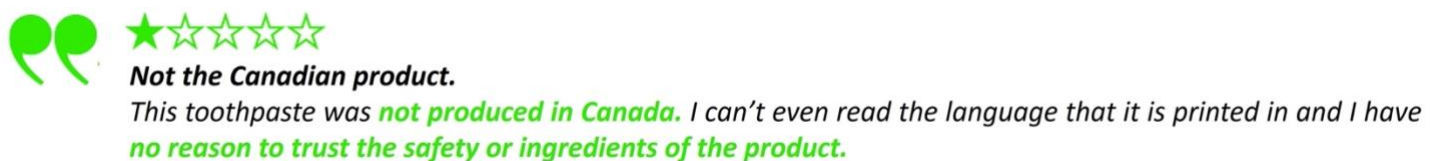
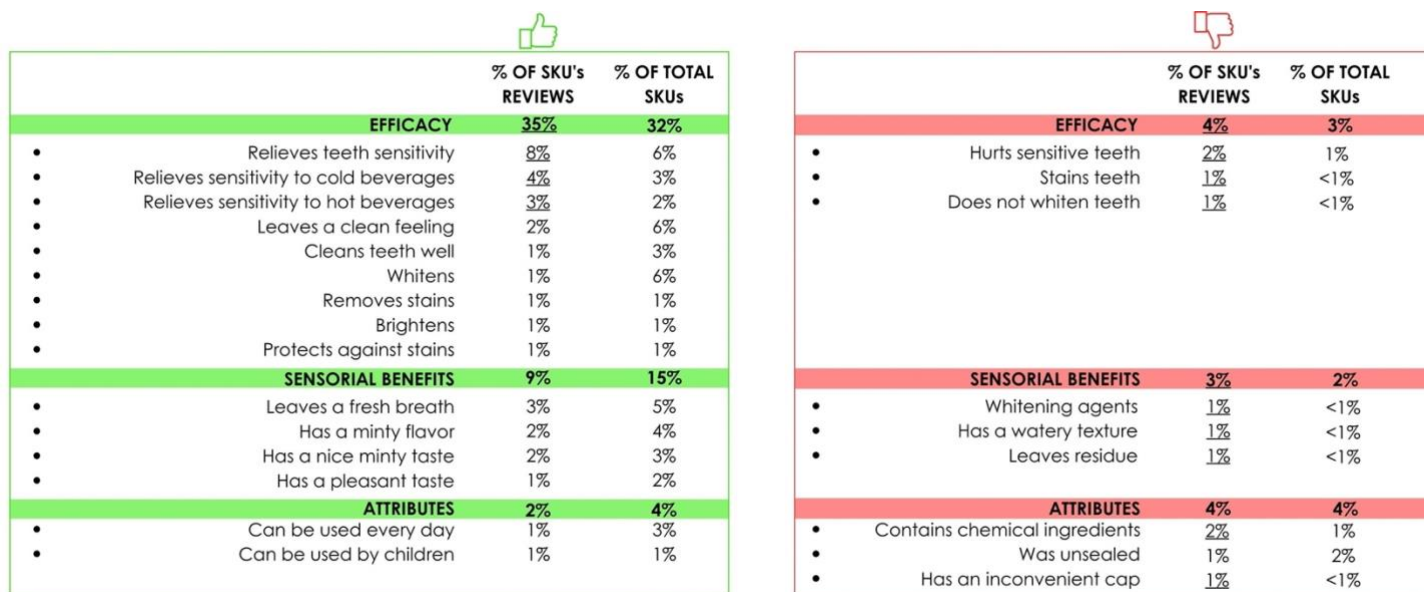


Figure 9: A review about a product that came from another country.

To confirm our intuition that online reviews could lead to the development of superior products, we adopted a gradual “test and learn” approach. The first project we conducted jointly in 2020 was an ad hoc analysis of 12 specific SKUs. The output enabled us to identify the main attributes (Figure 10), which drove positive or negative perception of the category—i.e., which attributes drive the superiority of an SKU versus another.



X% = overrepresented

Figure 10: Output from the analysis of the online reviews.

After this first analysis, we conducted approximately 20 similar analyses across several categories and countries, which helped benchmark performance as well as drivers of positive and negative perception across categories. It also confirmed that many questions could be answered through the analysis of online reviews. We went one step further in 2022, when we decided to kick-off a three-month proof of concept, and incorporate the analysis of online review in the new framework we developed to track the superiority of our products. We collected and aggregated in Semantiweb's proprietary "Ratings & Reviews Superiority Dashboard" (R&R SD) the online reviews of 10 US brands of toothpastes (see Figure 11), representing a total of 281 SKUs, and more than 200,000 reviews across four retailers.

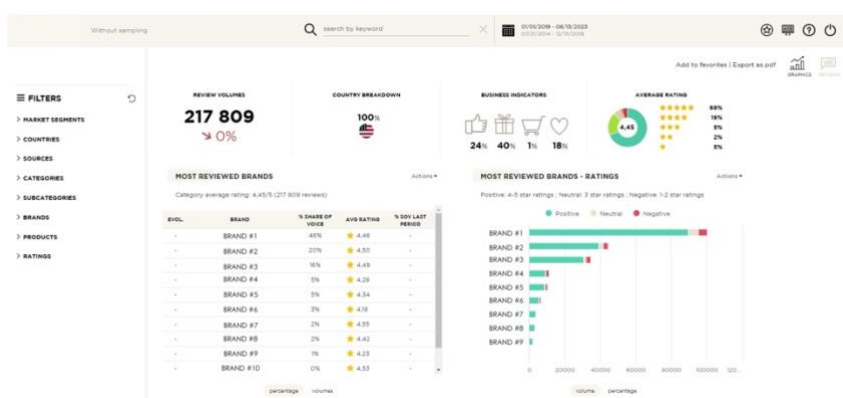


Figure 11: The Ratings & Reviews Superiority Dashboard.

We defined nine attributes, which we believed were critical to the overall liking of toothpastes: efficacy, cleaning, freshness, flavour, texture, appearance, price, packaging and sustainability. In order to fit into this framework, Semantiweb developed ad hoc semantic queries to capture positive or negative mentions for each of the nine attributes. Out of more than 200,000 reviews, approximately 88% mentioned at least one of these attributes (see Figure 12), which confirmed the relevancy of these attributes to assess the performances of toothpastes.

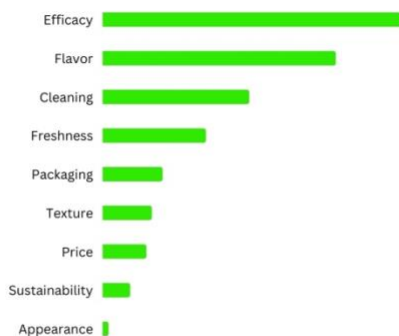


Figure 12: Penetration of the nine attributes out of all the category's reviews.

A widget was also developed and added to Semantiweb's dashboard to compare the performances of two specific SKUs, including the penetration of each attribute and the tone of voice of reviews that mention these attributes. This enabled us to have a quick overview of how our key SKUs compared versus their main competitors (see Figure 13), which would otherwise have been possible through lengthy and costly blind product placements.

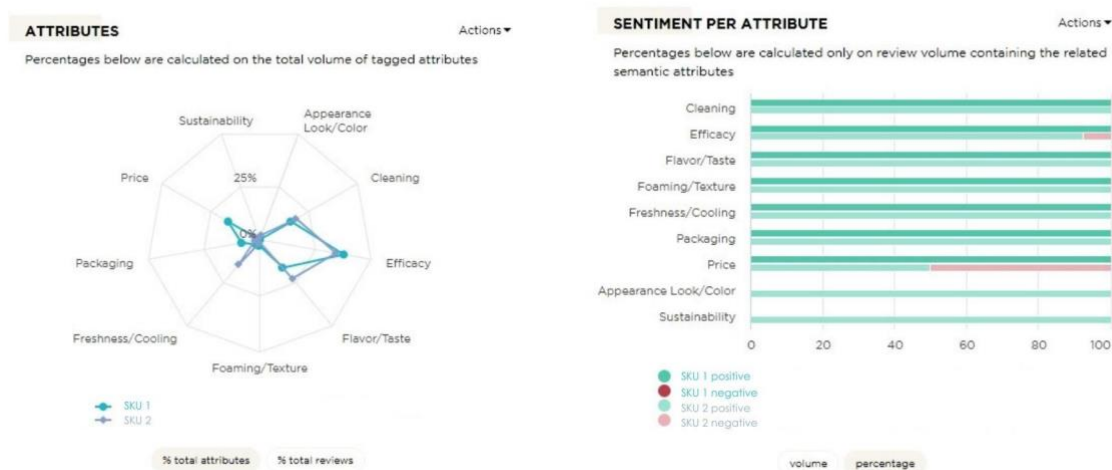


Figure 13: The widget allowing the comparison of SKUs.

To measure the success of this proof of concept, we compared the results from previous traditional home usage tests (HUTs) to the KPIs available in the R&R SD. We first matched the items tested in these HUTs with indicators available in the dashboard: the penetration of the nine attributes, but also business indicators such as the average star rating, the intention to buy again or the “brand love”—a proprietary indicator that measures advocacy (see Figure 14).

HOME USAGE TEST RESULTS			RATING & REVIEWS			CONSISTENCY OF RESULTS
	SKU #1	SKU #2		SKU #1 (n= 181)	SKU #2 (n= 527)	
• Overall liking	7	7.5	• Brand love	5%	23%	✓
• Purchase intent (top 2 box)	64%	76%	• Intention of repurchase	1%	2%	✓
• Freshness liking	74%	79%	POSITIVE ATTRIBUTES			✓
• Flavor liking	58%	74%	• Freshness	9%	11%	✓
• Cleanliness	81%	87%	• Flavor	17%	21%	✓
• Foaming	67%	70%	• Cleaning	12%	13%	✓
• Appearance	69%	79%	• Foaming	2%	3%	✓
			• Appearance	<1%	<1%	✓

Figure 14: Scorecard used to compare Sensodyne SKU versus competitor.

Previous HUT reports provided eight “battles” comparing each time one Haleon toothpaste versus one competitor. Generally, the results from HUTs and the R&R SD aligned in a very impressive way (see Figure 15). Overall perception matched across all “battles”; When comparing attributes, results were also very consistent and totally aligned for seven battles out of eight. For one battle, we had slight differences for two attributes: freshness and flavour. Further analysis revealed that the SKU that had a higher percentage of reviews mentioning both, actually had the term “fresh” in its name. Since a significant percentage of web users mentioned the product’s name, it artificially boosted this indicator. This SKU also had a higher percentage of reviews that mentioned its flavour, but most web users mentioned that the taste was “OK”, or not overwhelming, but did not mention loving it.

















				CONSISTENCY OF RESULTS (HUT vs. R&R)
	SKU #1	VS.	 COMPETITOR #1	✓
	SKU #2	VS.	 COMPETITOR #2	✓
	SKU #3	VS.	 COMPETITOR #3	Overall performance: OK Some differences (flavor & freshness)
	SKU #4	VS.	 COMPETITOR #4	✓
	SKU #5	VS.	 COMPETITOR #5	✓
	SKU #6	VS.	 COMPETITOR #6	✓
	SKU #7	VS.	 COMPETITOR #7	✓
	SKU #8	VS.	 COMPETITOR #8	✓

Figure 15: Synthesis of the results comparing HUT results with online reviews data.

After conducting this pilot, we felt even more confident about using online reviews to track the superiority of our products. Among the many advantages of this methodology were:

- Time and cost-efficiency;
- Scalability, since we can now compare a much higher number of SKUs;
- Flexibility, since we can at any moment decide to add new brands or countries, but also duplicate the approach to other categories.

Cherry on the cake: Identifying and following key opinion leaders

Key opinion leaders (KOLs) in the healthcare industry are influential individuals who possess expertise, knowledge and credibility in specific therapeutic areas or medical fields. They can be physicians, specialists, researchers, scientists, key academic figures, etc. They play a significant role in shaping medical and scientific practices by providing insights, opinions and guidance to healthcare professionals, industry stakeholders and the general public. Traditionally, the challenge has been to first identify KOLs in a certain healthcare domain, and then follow their insights through conferences and publications.

The cherry on the cake for us has been that KOLs typically have a presence on social media, and that social listening tools made it possible to identify these KOLs and track their conversations over time. This has enabled us to quantify their main themes of conversations, the new topics they may mention, the brands and products they recommend and why they recommend them. We were even able to contact a few of them directly. The on-going dialogue between the KOLs and their followers is also helpful to understand end-users' questions, in order to develop better products and experiences for them. For example, in an oral care case study, Semantiweb identified KOLs who talked about "enamel". In order to do so, Semantiweb analysed spontaneous online conversations about "enamel" and identified potential KOLs who were spontaneously mentioned by women, with comments such as "watch a video on YouTube", "read the book by...", "follow on Instagram", "listen to a podcast", etc (see Figure 16).



Figure 16: Examples of terms used to identify KOLs.

Semantiweb then analysed the online conversations posted by these KOLs, to identify their main themes of conversation, as well as the comments posted by their followers to understand consumers' expectations and needs. These KOLs can be tracked over time in an effort to identify new themes, brands, products or ingredients, and help us stay ahead of the market's latest trends.

Conclusions

For the last three years, the partnership between Haleon and Semantiweb has been enriched by an ongoing dialogue, which has led to new case studies, methodologies and services. So far, we have been able to have an in-depth analysis of approximately 500 SKUs across our five categories of products: oral health, supplements, respiratory, pain relief and digestive health. In addition to our own brands, we have also been able to analyse more than 150 competitors across 20 different countries in North America, Europe and Asia. We decided to extend the R&R SD to also include other markets. We also asked Semantiweb to conduct bi-yearly analysis of the category to analyse the main evolutions and brands' portfolio of products. Moreover, we are developing similar dashboards for other categories: gummies, nasal sprays and pain relievers.

We were very surprised to see the number of traditional methodologies that could be made obsolete by social listening. It was like doing qualitative research (listening to unprompted and/or voluntary comments) on thousands of consumers. This is something that no one could have thought of 20 years ago; at that time, proper research required first a qualitative part to understand consumers deeply, followed by a quantitative part to validate the relevance of the findings. We were able to get large volumes of unprompted feedback (100 to 16,000 reviews per SKU versus ca. 100 on average for HUTs) from all profiles of users (i.e., gender, age, location, ethnicity, etc.).

Some considerations still need to be kept in mind as we constantly monitor new behaviours and new technologies to enhance our methodology:

- We are currently working on new ways to better understand the profile of web users who leave reviews and understand their journeys, thanks to all the other reviews they have left within the same category but also other categories.
- We are actively working on how to capture new media: photos left in the reviews, but also new formats, especially videos that are increasingly popular to share reviews of products, especially on social media. For example, in June 2023, #productreview represented more than 1.2 million posts on Instagram, while #productreview represented more than 1.8 billion views on TikTok.

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