

# Digital Pulse

## Geneva 2019

LEADERSHIP NAVIGATION





## Table of contents

Executive summary	3
Background and methodology	4
Key findings and insights	6
Conclusions	17
About Leidar	19
Appendix: List of companies and organisations	20

## Executive summary

**Everyone talks about social media and digital communications, but to what extent do companies and organisations really harness their power? Which strategies work best and how are communications professionals taking advantage of digital opportunities?**

Leidar has conducted an audit of 121 international companies and organisations based in and around Geneva, Switzerland. We analysed more than 50 dimensions and measures in three focus areas to evaluate the sophistication of digital communication strategies. We wanted to determine the size of a brand's digital footprint and gain a better understanding of how they use personalised messages, brand ambassadors, sustainability initiatives and omnichannel experiences to engage audiences.

Our research and analysis shows that digital personalisation, the creation of one-to-one experiences with people based on their demographics and interests, is the strategy of choice. Brands are primarily sharing social media content to build awareness, not move people to action. Even intergovernmental organisations (IGOs), which lead the way in digital sophistication, have not fully explored how innovations like content hubs, chatbots and extended reality can help convince or inspire action. All this points to a disconnect, but also an exciting opportunity. Companies and organisations can deepen their understanding of people's decision journey by further integrating talent and technology. But awareness building should only be a starting point. Digital communications should help move people to action.

In addition to evaluating the sophistication of digital strategies, we identified patterns of behaviour or 'archetypes'—descriptions of how companies and organisations use digital communications to build relationships with their audiences. We describe the archetypes we found

as the Minimalist, the Storyteller and the Pioneer. Although these archetypes share a common pursuit of digital personalisation, they tend to lack a clearly defined digital communications strategy that goes beyond ad hoc activity.

- **The Minimalist:** Companies and organisations representing this archetype have fewer than 500 employees. They focus on the essentials and take a pragmatic approach to digital innovation. Their largest online communities are on Twitter and LinkedIn.
- **The Storyteller:** This archetype is represented by a diverse group of companies and organisations. They are creative content producers that excel at social media engagement. They also have large and engaged communities on Facebook and YouTube. Companies representing this archetype tend to communicate actively about corporate social responsibility (CSR) on web and social.
- **The Pioneer:** Companies and organisations representing this archetype have more than 500 employees. They stand out for their strong online presence, early adoption of digital innovations and big picture thinking. They are quick to share the spotlight with partners and they go furthest in tracking their own contributions to the Sustainable Development Goals (SDGs).

To make the most of digital opportunities, we recommend that companies and organisations clearly define what they want to do with digital and how they want to do it. These strategies should support communications objectives as well as drive positive outcomes. We also see an opportunity for brands to break down silos, integrate teams and align incentives to sharpen their understanding of the digital audience journey. Only then will they be in a position to meet people where they are and inspire them to action.



## Background and methodology

Social media, smartphones, artificial intelligence, extended reality and the Internet of Things have all helped to create a hyperconnected world. People feel closer to brands, celebrities and issues—and they expect meaningful omnichannel experiences. This poses both a challenge and an opportunity. The challenge is that companies and organisations must learn to make sense of big data, and create messages and content that people will not ignore. The opportunity lies in providing seamless brand experiences that inspire people to take action, such as supporting a cause or spreading the word about a product.

To better understand the sophistication level of digital strategies and identify distinct communications archetypes, we analysed 121 international companies and organisations headquartered in French-speaking Switzerland. The list included 38 business-to-consumer (B2C) companies, 33 business-to-business (B2B) companies, 16 IGOs, 16 foundations, 12 associations and 6 non-governmental organisations (NGOs). Our audit comprised more than 50 dimensions and measures in three focus areas: **Presence, Connection and Integration.**



**Presence:** the size of a company or organisation's digital footprint. This points to how well people are aware of the brand. In this focus area, we examined monthly website visits, online brand mentions and social media follower counts. The presence score was given the least weight in the evaluation of digital sophistication.

**Connection:** how the company or organisation is personalising its content and messages to engage with target audiences. We analysed the range of languages, content formats and visuals used on social media. We also explored the use of public-facing chatbots on websites and Facebook pages. We then measured social media engagement rates. This helped us understand the extent to which people felt connected to a brand.

**Integration:** how the company or organisation is integrating its talent and technology to provide omnichannel experiences, in the wider context of the SDGs. In this focus area, we looked at the percentage of total employees on LinkedIn and explored the use of content hubs, mobile apps and extended reality. In addition, we

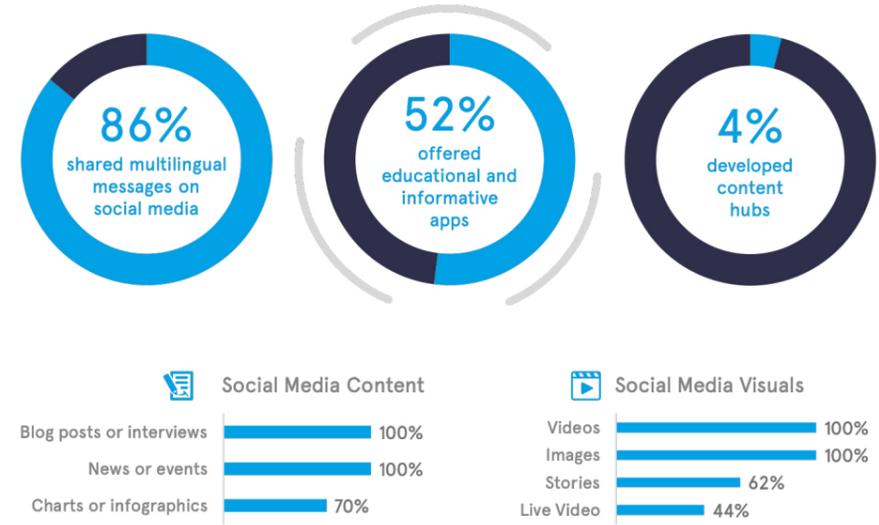
analysed website and social media mentions of ambassadors, partnerships and SDG programs. For companies, we also examined the use of e-commerce, and analysed website and social media mentions of CSR. The integration score was given the most weight in the evaluation of digital sophistication.

The following five-point scale was used to evaluate the sophistication level of a digital communications strategy: 1 (very low), 2 (low), 3 (moderate), 4 (high) and 5 (very high).

To complement our findings, we used a machine learning algorithm called K-means clustering to group similar data points together. We then analysed dozens of use cases to identify commonalities and differences in how brands communicate online. Finally, we defined three patterns of behaviour or 'archetypes' that explain how companies and organisations use digital communications to build relationships with their audiences.



ORGANISATIONS PURSUING DIGITAL PERSONALISATION



What was noteworthy about organisations was their use of live video to broadcast discussions and events. They also made good use of charts and infographics to tell impactful stories and encourage social media sharing.

On mobile, most organisations offered educational and informative apps to share news with the public, train staff in the field or teach students about a given topic.

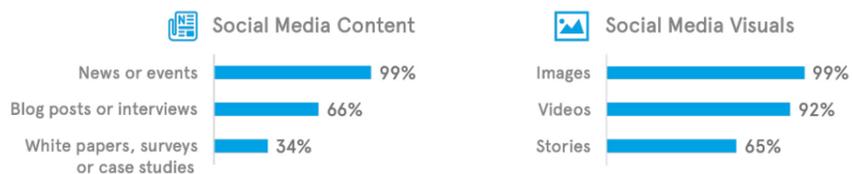
Key findings and insights

1. Digital personalisation is the strategy of choice

Our study found that most companies and organisations focused their digital strategies on personalisation: creating one-to-one experiences with people. This was most visible on social media and mobile where brands tailored content to resonate more deeply with audiences based on their demographics, locations, interests, behaviours and needs. A majority of brands shared news and opinions in English and at least one other language. We also observed

that most brands offered mobile apps on the App Store and Google Play. Although websites housed a lot of useful information, it was rare to find companies and organisations building on that value to create more engaging user experiences. Only a few brands developed content hubs to showcase content that answered people’s biggest topical questions. We also found that public-facing chatbots were virtually non-existent.

### COMPANIES PURSUING DIGITAL PERSONALISATION



One of the defining characteristics of companies was their focus on problem-solving. B2B companies differentiated themselves by sharing white papers and case studies on social media to highlight product benefits. B2C companies also stood out for selling products via third-party

e-commerce platforms and delivering customer service via Facebook chatbots. On mobile, most companies leveraged utility and productivity apps to help audiences perform a range of tasks, such as viewing dashboards, managing processes and navigating events.

#### Spotlight on innovation

##### Content hubs

- WEF’s content hub sits on its main website under “Agenda”. The organisation does well in organising content from various experts that relate to a host of topics, ranging from cybersecurity to plastics and the environment. Notably, they are able to drive a high percentage of website traffic from social media by contributing to trending discussions on social media.

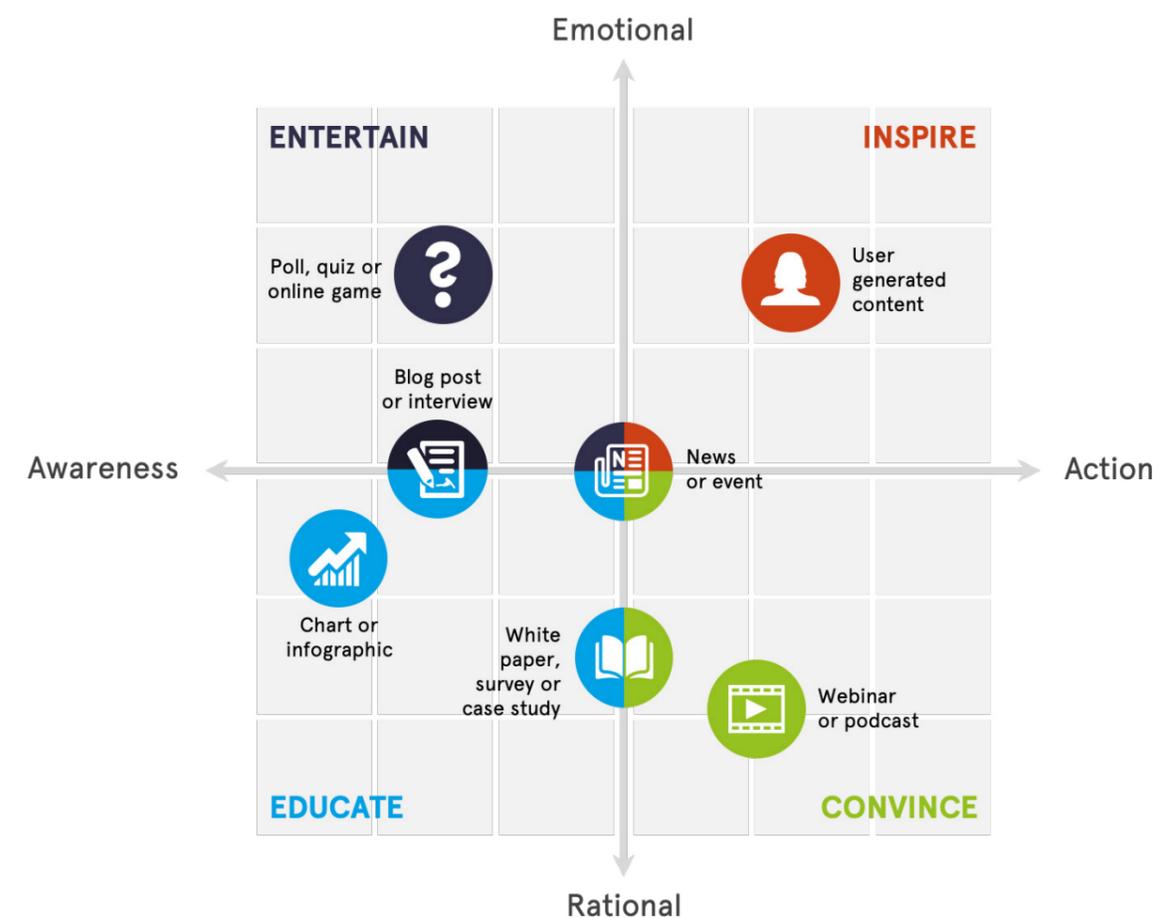
##### Extended reality apps

- ICRC’s “Enter the room” tells the story of how urban conflicts can devastate communities and families. For maximum emotional impact, the app leverages augmented reality to tell the story through a child’s point of view.
- Swissquote’s Trading VR app enables clients to view financial information, trade stocks and watch exclusive Manchester United videos in a virtual reality environment.
- WWF Free Rivers is an educational augmented reality app that brings natural landscapes to life on any flat surface, helping students better understand the importance of free-flowing rivers.

#### The last mile of social media is awareness not action

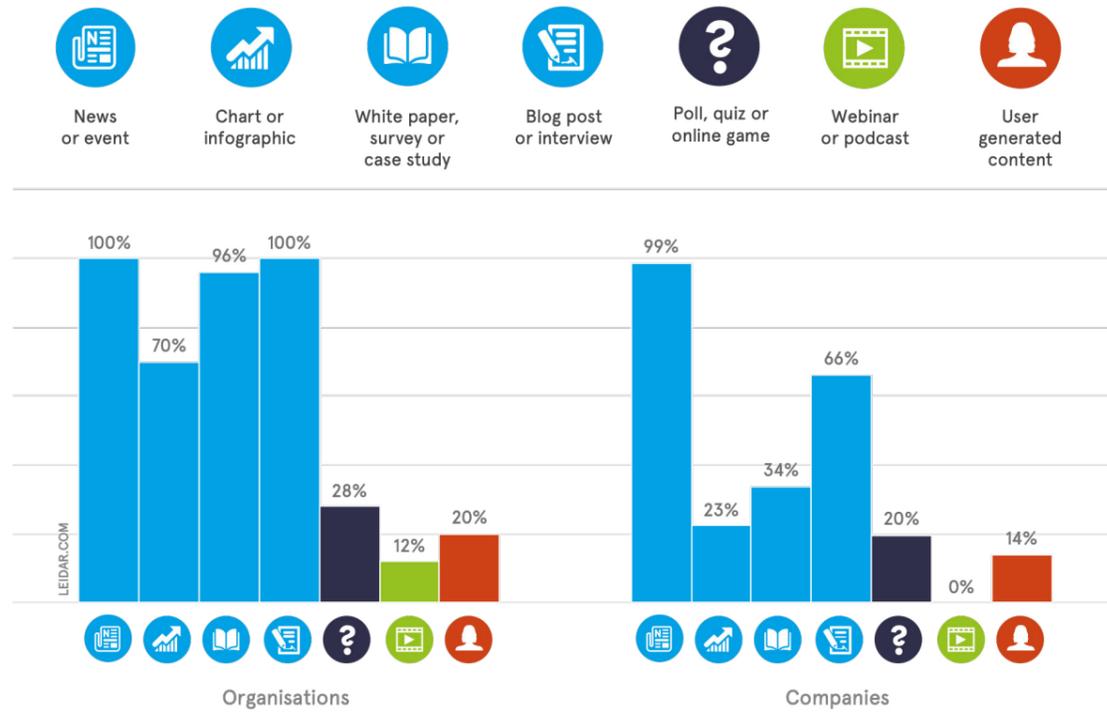
A closer look at social media content suggests a disconnect between social media activity and business/organisational objectives. We observed that most companies shared social media content to raise awareness about their brands, products and services. They also adopted digital personalisation strategies to connect more deeply with audiences. However, there was too little emphasis on social media content designed to inspire or persuade people to action, such as making a purchase or spreading the word about a product or service.

### SOCIAL MEDIA CONTENT MATRIX



Most organisations spent the bulk of their efforts raising awareness about issues and opportunities in sustainable development. While emotional and inspirational messages sometimes won the attention of online audiences, it wasn't clear how individuals could make an impact in the real world. Few organisations shared social media content to inspire or persuade people to action, such as signing a petition or making a donation.

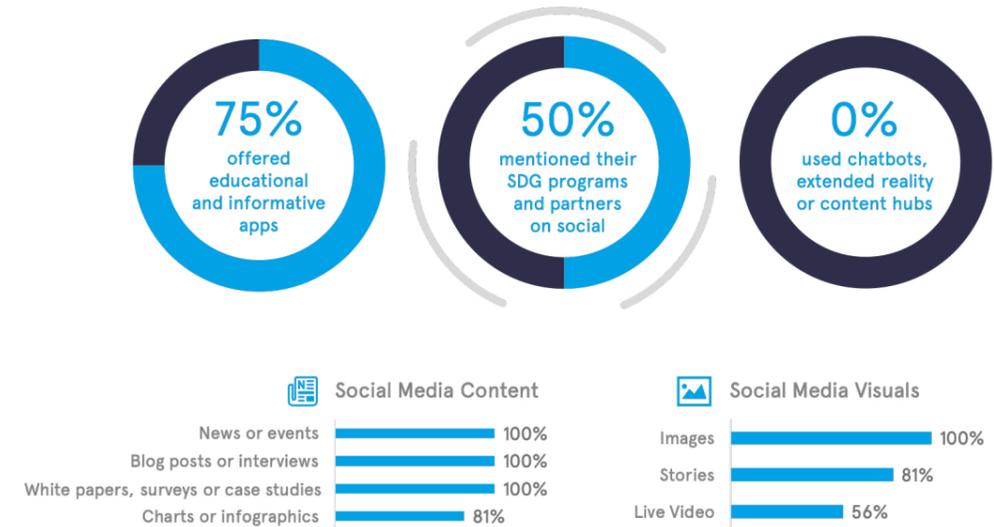
### SOCIAL MEDIA CONTENT USE



### 2. IGOs lead the way in digital sophistication

Of the 121 international actors included in our study, IGOs achieved the highest level of digital sophistication. Not only did they have high-traffic websites and large communities on Twitter and Facebook, but they were also successful in their pursuit of digital personalisation. Notably, the ability of IGOs to deliver the right message to the right audience at the right time did not detract from their ability to maintain a strong online presence. What was missing was a stronger commitment to exploring innovations that could help engage people in fresh ways and move them to action.

### IGOs PURSUING DIGITAL PERSONALISATION



We found that IGOs embraced a variety of visuals and content formats on social media. They made use of videos, white papers, infographics, polls and just about everything in between. They also tended to combine short-form and long-form storytelling. We also found that IGOs made every effort to humanise their brands and connect with

their audiences. They profiled leaders, teams, partners and beneficiaries. They also leveraged engagement tactics, such as fun facts, questions and calls to action. It is therefore no surprise that IGOs achieved the highest average engagement rate on social media, besting B2C companies and NGOs.

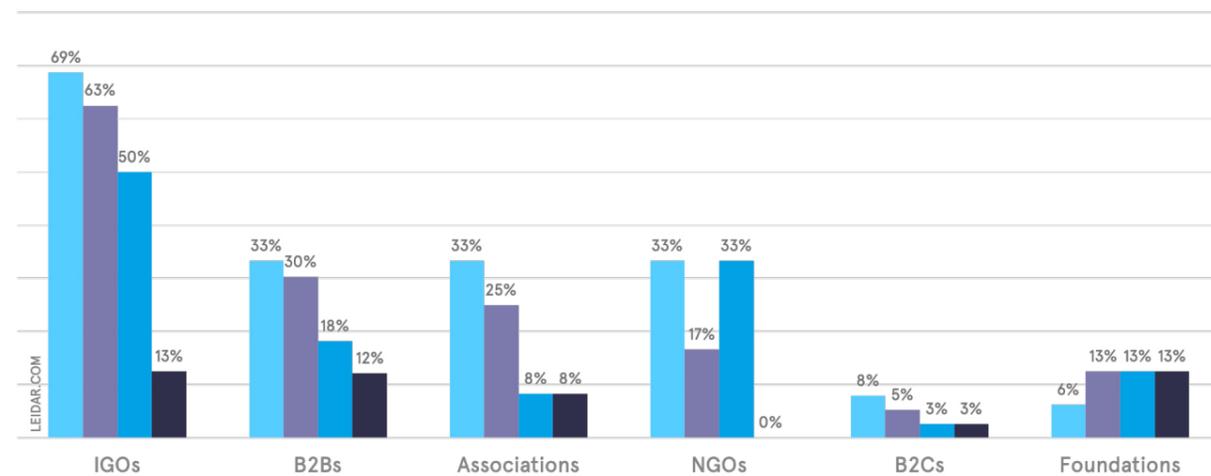
### TOP SOCIAL MEDIA CHANNELS FOR COMPANIES AND ORGANISATIONS



IGOs also offered mobile apps to engage and empower stakeholders. The International Organization for Migration (IOM) was one example. Through MigApp, IOM enabled migrants and expats to access information about visa requirements,

money transfer rates, medical centres and global incidents—information they normally wouldn't find in one place. IOM also helped enhance the work of their staff through apps like the IOM Emergency Manual and Community Response.

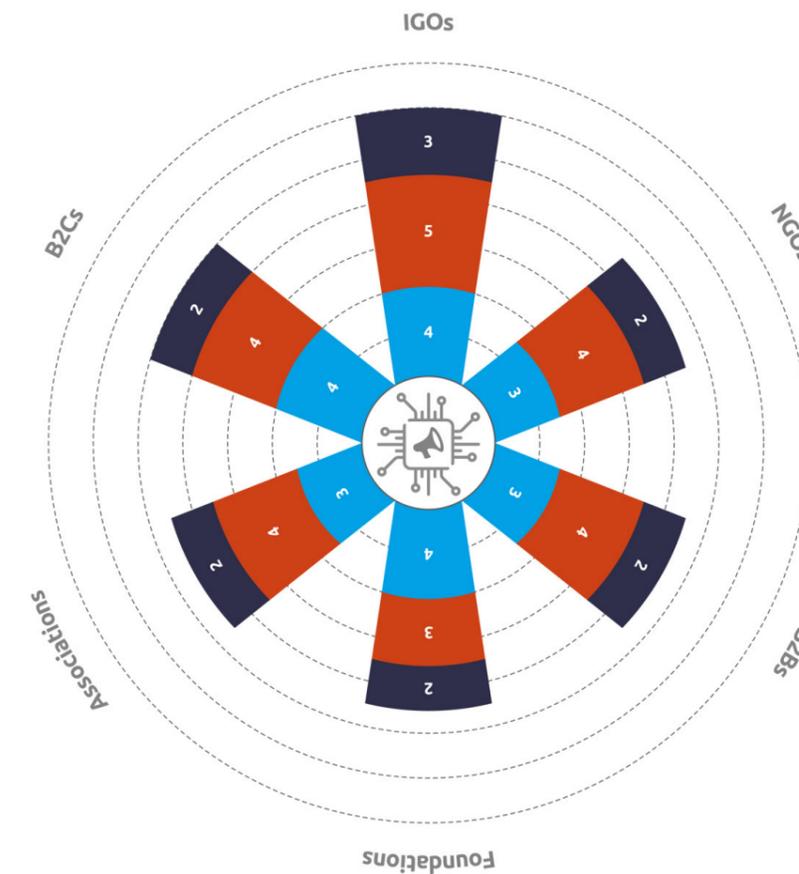
### COMMUNICATING ABOUT THE SDGs



As expected, a majority of IGOs communicated about their SDG programmes on both web and social. However, few IGOs discussed the results and impact of their SDG programmes. A notable exception was the International Labour Organization (ILO). They built a

dedicated webpage about SDG 8 (decent work and economic growth) where visitors could explore how the ILO contributes to specific targets and goals. ILO also discussed its progress on SDG 8 via social media, inviting stakeholders to read news, blog posts and reports.

### SOPHISTICATION OF DIGITAL COMMUNICATIONS



### 3. Three digital communications archetypes

Our cluster analysis revealed three archetypes to explain how companies and organisations use digital communications to build relationships with their audiences. We describe them as the Minimalist, the Storyteller and the Pioneer.

## The Minimalist

Companies and organisations representing the Minimalist archetype tend to be foundations, associations and B2B companies with fewer than 500 employees. They focus on the essentials—communicating about their own brand and activities using short-form storytelling and mainstream visuals. Twitter is the platform where they have the highest engagement and they have the largest presence on LinkedIn. These companies and organisations also take a pragmatic approach to digital innovation. They use chatbots without artificial intelligence and offer mobile apps without extended reality. They also ignore content hubs. Companies representing this archetype promote their products on third-party e-commerce platforms rather than on their own websites.

## The Storyteller

The Storyteller archetype is represented by companies and organisations of varying sizes. This includes NGOs, foundations, IGOs, B2B companies and B2C companies. They are creative content producers that skilfully use a wide range of formats and visuals. And they do not shy away from investing in infographics and podcasts. These companies and organisations also stand out for their ability to engage with audiences on social media. Their largest online community is on Facebook and their most engaged

community is on YouTube. Although they tend to ignore chatbots and content hubs, they do offer utility and productivity apps on mobile to help stakeholders solve problems and accomplish tasks. Companies that exhibit this archetype differentiate themselves by communicating actively about CSR on web and social.

## The Pioneer

Companies and organisations representing the Pioneer archetype tend to be IGOs and B2C companies with more than 500 employees. They stand out because of their strong online visibility across touchpoints and channels. They also tend to follow social media best practice, especially on Facebook and YouTube where they have large and engaged audiences. Notably, these companies and organisations are early adopters of digital innovation. They offer educational and informative apps that make use of gamification to better engage with mobile-savvy audiences. They also leverage chatbots, social shopping and extended reality apps to build positive brand experiences. Another noteworthy point is that these companies and organisations are big-picture thinkers. They are quick to share the spotlight with partners and go furthest in tracking their own SDG contributions.



Digital Communications Archetype	The Minimalist	The Storyteller	The Pioneer
Trait	Focuses on the essentials—communicating about their own brand and activities using short-form storytelling and mainstream visuals	Creative content creator that excels at social media engagement and that communicates actively about CSR	Stands out for strong online presence, early adoption of digital innovations and big picture thinking
Type	Foundations and associations   B2Bs	NGOs, foundations and IGOs   B2Cs and B2Bs	IGOs   B2Cs
Employee Size	1-500 employees	Varied employee sizes	501-5000 employees
Social Media Presence and Engagement	Strongest on Twitter and LinkedIn Weakest on YouTube	Strongest on Facebook and YouTube Weakest on Instagram	Strongest on Facebook and YouTube Weakest on LinkedIn
Social Media Content	Primarily news & blog posts Sometimes shares white papers, surveys or case studies	Primarily news & blog posts Sometimes shares white papers, surveys or case studies	Primarily news & blog posts Sometimes shares white papers, surveys or case studies
Social Media Visuals	Primarily images and videos	Primarily images, videos and Stories Only users of infographics and podcasts	Primarily images, videos and Stories
CSR Program Mention (companies only)	Sometimes 	Frequently 	Sometimes 
CSR Results Mention (companies only)	Rarely 	Sometimes 	Occasionally 



Digital Communications Archetype	The Minimalist	The Storyteller	The Pioneer
SDG Program Mention	Rarely 	Occasionally 	Sometimes 
SDG Results Mention	Rarely 	Rarely 	Rarely 
Partnership / Ambassador Mention	Sometimes 	Frequently 	Frequently 
Mobile App Type	Primarily educational & informative and utility & productivity apps	Primarily educational & informative and utility & productivity apps	Primarily educational and informative apps
E-Commerce Use (companies only)	Rarely 	Rarely 	Frequently 
Chatbot Use	Rarely 	Rarely 	Rarely 
Content Hub Use	Rarely 	Rarely 	Rarely 

The three archetypes share a common pursuit of digital personalisation. They're building an online presence through multiple channels and they're sharing a variety of messages and content on social media. However, digital and social media activities seem to be reduced to ticking boxes.

What's lacking in most cases is a well-defined strategy that goes beyond ad hoc activity and supports meaningful outcomes.

## Conclusions

Companies and organisations should seize the following opportunities to bring higher levels of sophistication to their digital strategies.

### Organisational

- Perform digital listening to inform your digital communications strategy. This will enable you to prioritise stakeholders and channels as well as create more compelling content.
- Map your audience's decision journey to deliver the right message to the right person at the right time, moving them to action.
- Break down silos between digital channels—SEO, social media—and communications functions, particularly marketing and public relations. Then align incentives to help your team adopt an audience-first mindset.
- Upskill your employees in content creation, data analytics, alliance building and behavioural change techniques.

### Strategic

- Create a digital communications strategy and a social media strategy to focus your efforts on driving meaningful outcomes for your company or organisation.
- Adopt an integrated evaluation framework that aligns internal objectives and measures communication outcomes across paid, owned, shared and earned media.
- Connect to the big picture in two ways.
  - Establish your authority on a particular topic to help answer the biggest questions your audiences are asking in the visual and content formats they like best.
  - Adopt the SDGs as a framework to help express your purpose and explain your contributions to the wider world.

### Tactical

- Develop a content strategy built on thought leadership and organise your stories and facts in a content hub to help your audiences find answers to topical questions.
- Select quantitative and qualitative metrics that drive improvement of business/organisational performance as well as real-world outcomes.
- Create a procedure for digital listening and feed what you learn into optimising brand touchpoints and contributing to online discussions.
- Develop cross-channel campaigns with creative content that people cannot ignore; include clear calls to action that show people how to take the next step.
- Use a combination of organic and paid digital media to improve your brand awareness, engage with target audiences and build long-term relationships.
- Build an incentivised employee advocacy programme to activate your employees as brand ambassadors and thought leaders.
- Partner with topic specialists and experts in your industry/sector to reach niche, highly engaged audiences.
- Leverage innovations like chatbots for knowledge management, extended reality for emotional storytelling or social shopping for seamless conversions.
- Invest in artificial intelligence and automation tools to help your team achieve more with less.

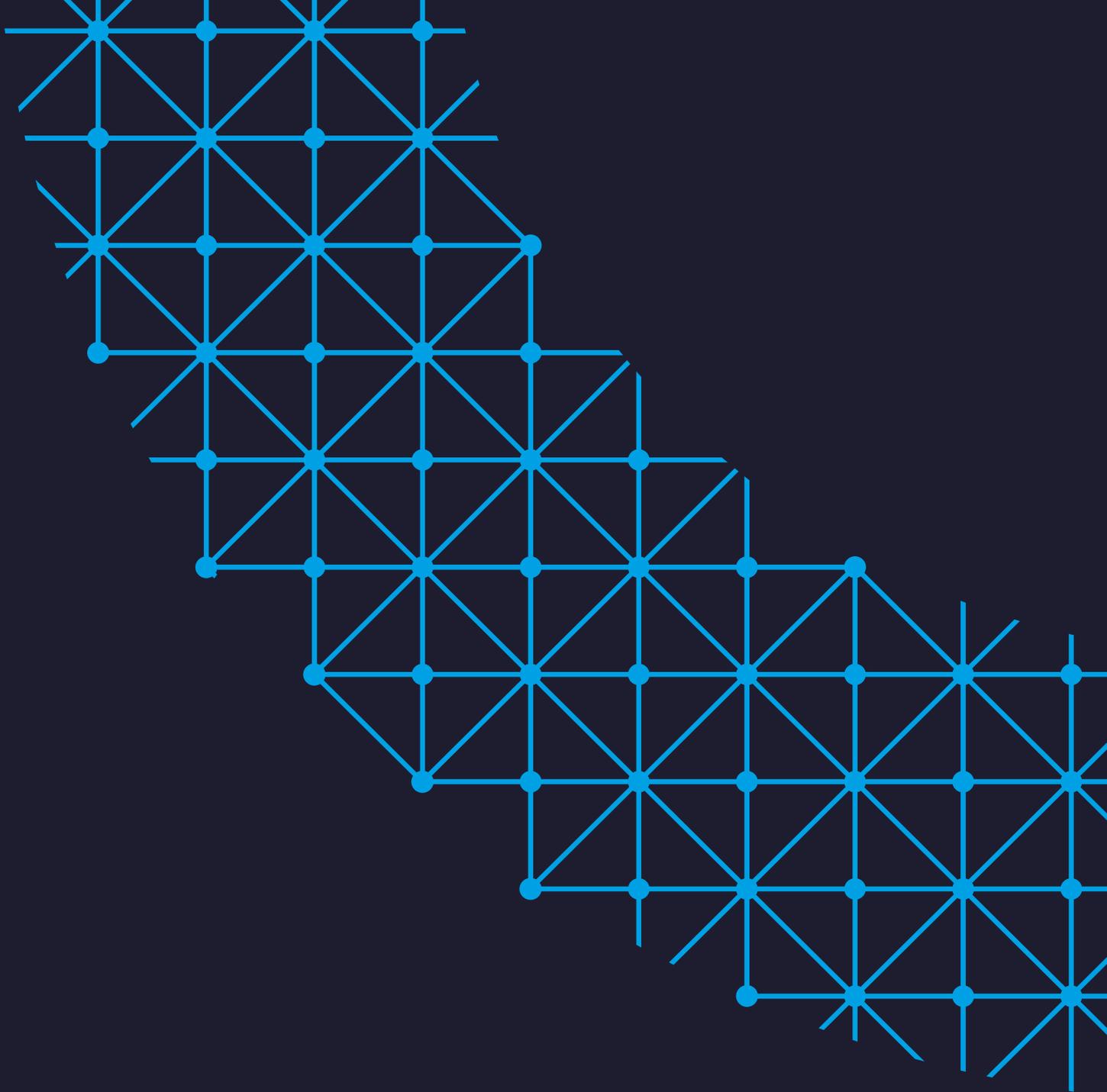
**We also believe that companies and organisations can learn from our archetypal analysis to make concrete improvements in their day-to-day activities.**





## Appendix: List of companies and organisations

- Aga Khan Foundation (AFK)
- AkriviA
- Audemars Piguet
- Banque Profil de Gestion
- Banque SYZ
- Baume & Mercier
- Bedat & Co
- Blancpain
- Bovet Fleurier
- Breguet
- Capocaccia
- Caran D'Ache
- Carl F. Bucherer
- Centre for Humanitarian Dialogue (Centre Henry Dunant Pour Le Dialogue Humainitaire)
- Certina
- Chopard
- Corum
- Coty
- Edmond de Rothschild Group
- European Broadcasting Union (EBU)
- European Organization for Nuclear Research (CERN)
- Ferring Pharmaceuticals
- Firmenich
- Franck Muller
- Frédérique Constant
- GAVI, the Vaccine Alliance (GAVI)
- Geneva Call
- Geneva Centre for the Democratic Control of Armed Forces (DCAF)
- Geneva International Centre for Humanitarian Demining (GICHD)
- Geneva Tourism & Conventions Foundation
- Girard Perregaux
- Givaudan
- Global Alliance for Improved Nutrition (GAIN)
- Gunvor Group
- Harsch, The Art of Moving Forward (Henri Harsch HH SA)
- Hublot
- International AIDS Society (IAS)
- International Air Transport Association (IATA)
- International Catholic Migration Commission (ICMC)
- International Cocoa Initiative (ICI)
- International Committee of the Red Cross (ICRC)
- International Federation of the Red Cross and Red Crescent Societies (IFRC)
- International Labour Organization (ILO)
- International Olympic Committee (IOC)
- International Organization for Migration (IOM)
- International Organization for Standardization (ISO)
- International Road Transport Union (IRU)
- International School of Geneva (Ecolint)
- International Telecommunications Union (ITU)
- International Union for Conservation of Nature (IUCN)
- Internet Society (ISOC)
- Interpeace
- Jaeger-LeCoultre
- Japan Tobacco International (JTI)
- Jaquet Droz
- Kempinski Hotels
- Kofi Annan Foundation
- Kudelski Group
- Logitech
- Lombard Odier Group
- Luigia
- Medair
- Mercuria Energy Trading
- Mido
- Mirabaud Group
- MSC (Mediterranean Shipping Company)
- Nestlé
- Nestlé Nespresso
- Parmigiani Fleurier
- Patek Philippe
- Philip Morris International (PMI)
- Piaget
- Pictet Group
- Programme for Endorsement of Forest Certification Schemes (PEFC)
- Raymond Weil
- REYL Group
- Richard Mille
- Richemont International
- Roger Dubuis
- Rolex
- Salt Mobile
- Schindler Group
- SGS
- SICPA (Société Industrielle et Commerciale de Produits Alimentaires)
- SITA
- Socar Trading
- STMicroelectronics
- Sucafina
- Swissquote
- TAG Aviation
- TAG Heuer
- Temenos Group
- Terre des Hommes
- Tetra Pak
- The Global Fund to fight AIDS, Tuberculosis and Malaria
- Tissot
- Trafigura
- TRIAL International
- Ulysse Nardin
- UNAIDS (Joint United Nations Programme on HIV and AIDS)
- UNHCR (The UN Refugee Agency)
- UNI Global Union
- Union Bancaire Privée (UBP)
- United Nations Conference on Trade and Development (UNCTAD)
- United Nations High Commissioner for Human Rights (OHCHR)
- United Nations Office at Geneva (UNOG)
- United Nations Office for the Coordination of Humanitarian Affairs (OCHA)
- Vacheron Constantin
- Vitol Group
- World Business Council for Sustainable Development (WBCSD)
- World Council of Churches (WCC)
- World Economic Forum (WEF)
- World Health Organization (WHO)
- World Intellectual Property Organization (WIPO)
- World Lutheran Federation (WLF)
- World Meteorological Organization (WMO)
- World Organization of the Scout Movement (WOSM)
- World Student Christian Federation (WSCF)
- World Trade Organization (WTO)
- World Wildlife Fund (WWF)
- Zenith



---

Rue Ami-Lévrier 15  
1201 Geneva  
Switzerland

Avenue Louise 120  
1050 Brussels  
Belgium

3 Kenrick Place  
London W1U 6HD  
United Kingdom

Grev Wedels  
Plass 4, 0151 Oslo  
Norway

JAFZA One, Tower A  
PO Box 35608, Dubai  
United Arab Emirates