

# The London 2012 'Socialympics'

An assessment of the social media performance of Olympics sponsor brands

September 2012



# **Contents**

Introduction	3
Summary	2
The first social Olympics?	ŗ
How we tracked the Olympics sponsors	(
The London 2012 Social Scoreboard	7
Differing strategies or none at all?	8
Ambush? What ambush?	14
A sponsor's view	16
What was the real social ROI?	17
Conclusion	18
Appendices	20

## Introduction

It has been estimated¹ that the 25 main sponsors of the London 2012 Olympics will have spent more than £2 billion (\$3.2bn) this year on marketing initiatives to 'activate' their rights. Inevitably questions will be asked about value for money and, with social media front and centre, assessing the effectiveness of this aspect of Olympics sponsorship activation has acquired a new importance.

So, have this year's sponsors got the maximum return on their social media investment in what is claimed to have been the first true 'social Olympics'?

Some sponsors, typically global B2C brands, have clearly spent more than others, such as B2B brands. But *all*, one might assume, would want to be sure they got the most from their sponsorship, whether through sales, customer entertainment, employee motivation, community engagement or wider association of their brand with the sporting magic of the five rings.

To find out, Sociagility set up a tracking study – the longest and most comprehensive of its kind – to compare the social media performance of the main 25 sponsors, using its proprietary PRINT™ methodology.

This report summarises the key findings of that study.

## Making our data open

After tracking 25 brands for 145 days across 4 social networks and 5 dimensions of social media performance, we've amassed 43,500 individual data points. In the spirit of Open Data, we are making the data from this study available for anyone to use, reuse and redistribute, subject only to a requirement to attribute and share-alike.

The full data set can be downloaded from: http://www.sociagility.com/socialympics

<sup>&</sup>lt;sup>1</sup> David Owen. "£2 billion could be spent by London 2012 sponsors on 'activation' marketing", eventsecrets.com <a href="http://eventsecrets.com/event-management-news/exclusive-2-billion-could-be-spent-by-london-2012-sponsors-on-activation-marketing/">http://eventsecrets.com/event-management-news/exclusive-2-billion-could-be-spent-by-london-2012-sponsors-on-activation-marketing/</a>> (17 April 2012)

# **Summary**

The Sociagility London 2012 Socialympics study is, we believe, the longest and most comprehensive ever undertaken into the comparative performance of key Olympics sponsors in activating their sponsorships through social networks. It used Sociagility's PRINT™ performance measurement system to provide a purely quantitative assessment of sponsor brands' performance on websites, Twitter, Facebook and YouTube over a four-month period from 18 April 2012, 100 days before the opening ceremony, to the end of the Summer Olympics on 12 August 2012.

Sponsors' performance was tracked on a daily basis and weekly reports published. From 6 June 2012, the daily tracking was made directly available via an interactive website, the London 2012 Social Scoreboard <a href="http://olympics.sociagility.com">http://olympics.sociagility.com</a>.

• Strategic differences were evident. Some brands (e.g. BMW, Cadbury, Cisco and P&G) benefitted from starting early while others (like adidas, British Airways, Coca-Cola, EDF and VISA) concentrated their efforts later on when Olympics fever was at a peak. Some brands (e.g. Thomas Cook) opted for a dedicated Olympics social media presence and accounts, whilst others used their existing primary 'brand' accounts for Olympics content.

- By contrast, a significant number of brands did not appear to engage with social media at all – or only sporadically.
- For some, it appeared that social media activation was undertaken in isolation or as an afterthought – or as merely an amplifier for advertising campaigns.
- Few campaigns seemed to be centred in 'social' or had social fully integrated.
- Some smaller brands outperformed larger ones on the Sociagility PRINT™ rankings by adopting what appeared to be a more proactive policy of engaging in real social dialogue.
- Ambush strategies by non-sponsors did not appear to generate impact in social media sufficient to compete with sponsors.
- The brands that led the Sociagility PRINT™ rankings were those that used social media to focus on engagement not just brand awareness.

# The first social Olympics?

The London 2012 Games were not the first to take place with social media and networks present – forums and blogs have been around for a while and recently both Beijing 2008 and Vancouver 2010 had them as a factor. But since then there has been an enormous increase in consumer usage and in the geographic pervasiveness of social networks. This has been accelerated by the continuing rise of mobile usage, encouraging the use of social networks. At the same time, many brand marketers (but by no means all)

have come to realise their importance and

include social media in their plans.

Overall, it seems fair to call the London Games, as many have, the first truly social Olympics, or 'Socialympics'.

19%

THE LONDON 2012 OLYMPIC GAMES OPENING CEREMONY ON 27 JULY FEATURED IN 19% OF ALL UK SOCIAL MEDIA CONVERSATIONS THAT DAY 150m

TWITTER SAW WELL OVER
150 MILLION TWEETS ABOUT
THE OLYMPICS DURING THE 16
DAYS OF THE OLYMPICS
GAMES

Source: Nielsen

Source: Twitter

80,000

THE NUMBER OF TWEETS
PER MINUTE MENTIONING
USAIN BOLT REACHED 80,000
DURING HIS RETENTION OF
THE 200M GOLD

Source: Twitter

116m

THE NUMBER OF POSTS AND COMMENTS ON FACEBOOK RELATING TO THE OLYMPICS OVER THE COURSE OF THE GAMES

Source: Facebook

12.2m

THE COMBINED NUMBER OF 'LIKES' ADDED TO OLYMPIC ATHLETES' FACEBOOK PAGES DURING THE MAIN OLYMPIC GAMES

Source: Faceboo

# How we tracked the Olympics sponsors

We tracked the social media performance of the sponsors on a daily basis from April 18 2012 (100 days from the start of the Games) to the closing ceremony of the Paralympics Games on September 9 2012 using our proprietary methodology, PRINT™. Unlike monitoring and sentiment analysis tools, **PRINT™** measures actual brand performance, not what people are saying about a brand. It does so by looking at more than 50 data points from multiple social networks across five dimensions of social brand success: Popularity, Receptiveness, Interaction, Network Reach and Trust.

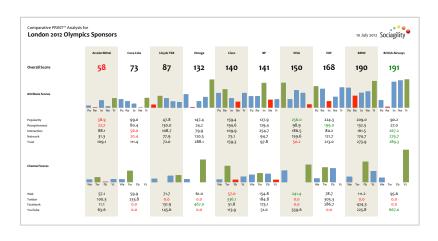
Crucially, **PRINT™** is a comparative measurement system. Brands compete against each other, not to achieve some theoretical perfect score. So all PRINT™ scores are calculated against a chosen comparison set, in this case the other sponsors. The PRINT Index™ itself provides an overall indicator of a brand's effective use of social media to drive profile and engagement.

In this study we measured the performance of the main Games partners listed on the London 2012 website. We analysed multiple channels (sponsorship website, Twitter account, Facebook page and YouTube channel), including only those sites

and accounts designated or dedicated to sponsorship activation by the brands themselves. We researched and identified each brand's sponsorship activation profiles and accounts (no easy task) and also offered all brands the opportunity to suggest changes to the sites or accounts monitored.

This was a purely quantitative analysis. We made no attempt to contact brands to understand their activation strategies. However, there is an opportunity for more detailed study and commentary (including by the brands themselves) about the very different brand strategies that were clearly in operation.

An example PRINT™ scorecard



## The London 2012 Social Scoreboard

While our tracking was daily for all brands across all channels, for the first six weeks we published weekly analyses on our blog. On 6 June 2012, 50 days from the start of the Games, we launched the London 2012 Social Scoreboard, a simple site allowing anyone to interact directly with our data. Direct comparisons could also be made between one brand and another.

Updated daily, the site showed the overall changing PRINT Index<sup>TM</sup> rankings – and also brands ranked separately by their Status and Potential.

#### **Status**

The Status score combines the PRINT™ Popularity and Network Reach attribute scores to give an approximation of size, brand legacy and marketing spend.

#### **Potential**

The Potential score combines the Receptiveness, Interaction and Trust attribute scores, which focus more on engagement by and with a brand.

It is important to note that the PRINT™ methodology does not generate an absolute score for each brand, but assesses brands relative to a given comparison set. So rankings change depending on both an individual brand's own performance and that of other sponsors.

The London 2012 Social Scoreboard



# Differing strategies... or none at all?

Whilst our tracking was daily, we examined the results and changes weekly to see what trends were emerging and how the comparative performance of individual brands could provide useful clues to their strategies.

## **Early movers**

One of the first trends we identified in our weekly analyses was that there were some clear early movers – among them BMW, Cadbury and P&G – who seemed to be doing well. Within weeks, there were big changes in the rankings as others started to engage. Soon, all the top ten spots had changed with one exception. That exception was P&G, which quickly established itself as one of the major players in this year's 'socialympics' with its well-thought-out 'moms' strategy.

#### **Dedicated versus mainstream**

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A second strategic difference soon emerged. Some sponsors, like Thomas Cook, were using dedicated Olympics focused channels with some success, while others were adding Olympics content to their main sites and accounts – also with success. It remains a matter of debate as to which is the better approach.



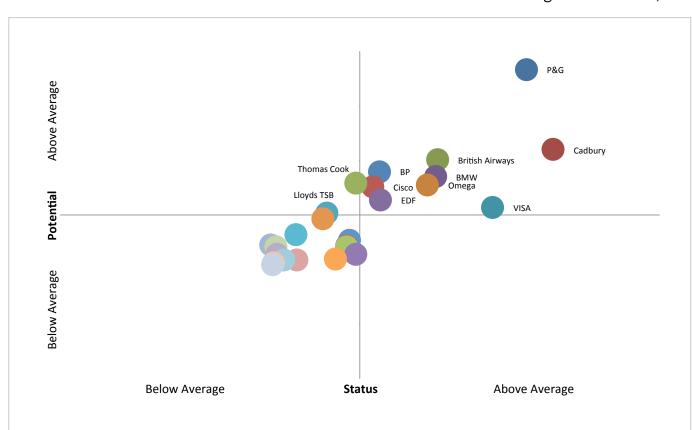
Our own conclusion is that there are advantages to both strategies and much will depend on the individual brand and its resources. It may be that a less well-known brand with limited resources should focus on its existing channels, finding it harder to build a new following from nothing. On the other hand, reaching out more specifically to an 'Olympics' audience may allow greater and more targeted engagement.

## **Daily changes**

As the Olympic torch reached the United Kingdom, we launched the **London 2012 Social Scoreboard**, allowing anyone to interact directly with our daily ranking data – and allowing head-to-head

comparisons to be made between sponsors. P&G still topped the list, but new challengers emerged like BP, British Airways and Cisco. As more and more brands launched their activities, the rankings moved around, as anticipated.

The relative Status and Potential of the London 2012 sponsors



#### Big guns versus engagement

Over the next couple of months, the top ten positions moved around a good deal as the different strategies of the leading brands played out. While leadership in the overall rankings changed, day-by-day, analysis of the *Status* and *Potential* rankings showed other, sometimes greater, differences. Brand

size, heritage and spend showed up as higher scores on the Status scale, reflecting the advantage of the big guns with their big budgets. But only a deliberate engagement strategy led to high Potential scores.

## Too late... or nicely timed?

By the end of June, with one month to go, we were wondering if some major brands like EDF and McDonalds had left their moves too late. Within days, both brands announced and then started their Olympic campaigns in earnest. Each brand



immediately benefitted from its greater engagement, rising quickly in the rankings, as did British Airways with its 'Home Advantage' campaign. What also began to show at this stage however, was how well integrated the social aspect of sponsorship activation was with other more traditional aspects of marketing – or not. In time, EDF would show that its approach to integrating social was superior to McDonalds.

## Two weeks to go

With two weeks to go, all the leading brands began to up the ante. We had always offered brands the chance to nominate their own channels but the social media landscape was so changed from when we started that we decided to review this ourselves, proactively. We therefore reassessed every one of the

brand sites, channels and accounts used to drive the scores on our scoreboard, including more mainstream ones.

As a result of this review, adidas, British Airways and Coca-Cola now took the top spots, with EDF also claiming a leading position on the back of its 'Energy of the Nation' Twitter-powered London Eye lightshow, generating both traditional and social media comment. The fact that this was to some degree just a stunt was made more acceptable by its appropriateness and authenticity – a lightshow created by an electricity company.



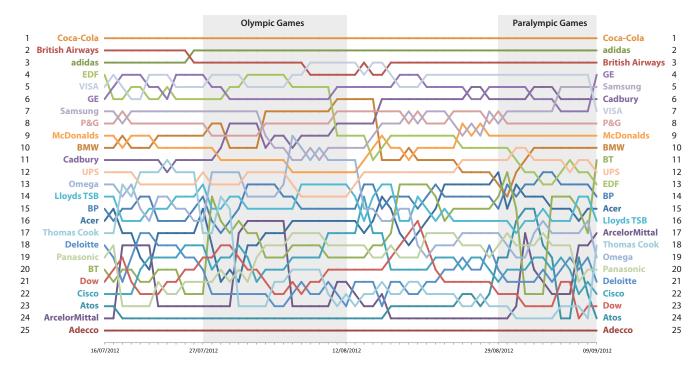
Those brands, like Cadbury's or Cisco, who established a dedicated Olympics presence early on potentially benefitted from months of active engagement targeted at Olympics fans. Others, like Coca-Cola, EDF and VISA, benefitted from concentration of maximum effort and the potential for integration with other advertising and marketing activity, just as wider consumer 'Games fever' and more general attention peaked.

As the charts on the subsequent pages show, the *Status* dimensions of social media performance (awareness and reach) remained relatively constant, but the *Potential* dimensions (engagement and interaction) changed a good deal and produced different leaders. It is here the social media battle was most actively fought – and, we believe, won.

# London 2012 Olympics Sponsors PRINT Index™ Rankings: 16 July – 9 September 2012

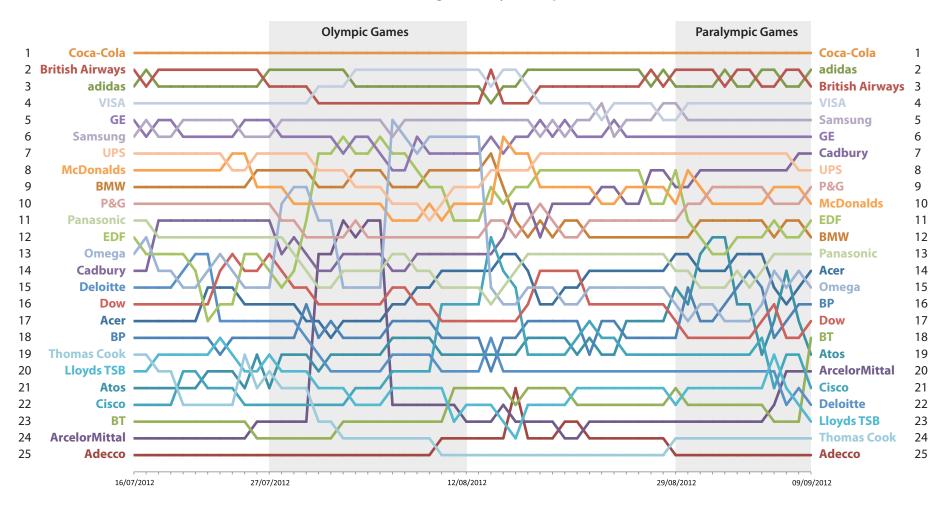
## The final laps

As the PRINT Index™ rankings leading up to the Games (and the Paralympics Games) show, sponsors' social media performance changed on a daily basis, sometimes significantly. This is a result of both proactive and reactive engagement (e.g. ArcelorMittal's performance jumps during both Games – perhaps as a result of the physical presence of the steel company's Orbit structure in the Olympic Park itself).

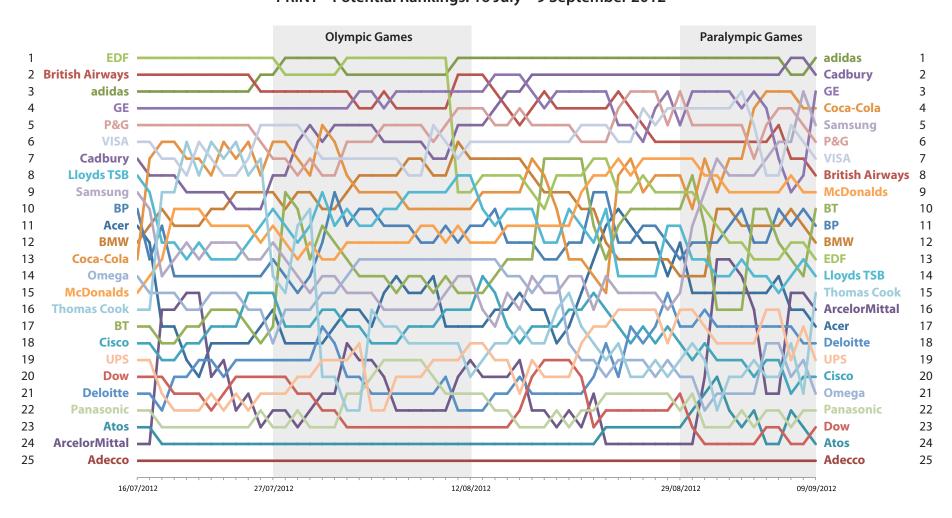


# **London 2012 Olympics Sponsors**

PRINT™ Status Rankings: 16 July – 9 September 2012



# London 2012 Olympics Sponsors PRINT™ Potential Rankings: 16 July – 9 September 2012



## Ambush? What ambush?

One of the running stories at this Olympics, as usual, was whether the ambush marketers would succeed in outperforming sponsor brands. The argument was that social media would make it impossible to 'control' the message and sponsors could lose out as rivals stimulated consumer-generated but competitively-branded content.

As far as social media is concerned, there seems to be no real evidence of that. We compared adidas – a late starter in the 'socialympics' but the most experienced (and arguably most authentic) Games sponsor of all – with Nike, its well-heeled global rival with equally impressive authentic sports credentials. This showed that adidas out-performed in social media, especially in terms of the PRINT™ engagement criteria like Receptiveness and Interaction, despite Nike's aggressive 'Londons' ambush campaign.

What makes adidas's performance even more impressive is that

it was only a local sponsor of the Olympic games, not a worldwide partner. This meant that it could only activate its sponsorship on social media platforms targeted to the UK or via UK-specific accounts (such as @adidasUK).

## **Protecting sponsor's rights**

Already, with an eye on the Olympic Games in Rio in 2016, some marketers have been asking whether the International Olympic Committee (IOC) could or should further tighten the rules around social media to prevent athletes, brands and Games visitors from 'abusing' sponsors' rights. It is on these rights, of course, that the IOC and its member sports federations depend for their funding. So, any legal laxities have serious financial consequences.

It remains to be seen whether subsequent formal London 2012 Games analysis will show brands that they have lost out in some

Company	PRINT	Status	Potential	We	Tw	Fb	Yt	Pop	Rec	Int	Net	Tru
adidas	106	92	115	114	135	49	126	110	129	116	74	100
Nike	89	108	77	86	65	131	74	90	46	84	126	100

way to ambush marketers in these Olympics. At Sociagility, our best guess is absolutely not.

It seems likely that social media, in the main, will prove to have been essentially amplifiers or accelerators of the broadcast and brand content created. Some brands may have felt that negative sentiment was also have been amplified – e.g. McDonalds and the appropriateness of their sponsorship of Olympic sport. But these sentiments did not *originate* on social media and, in any case, social media gave huge power to brands to engage directly with critics unreliant on traditional media. GE, for example, did a good job of engaging with critics head-on and its creditably high engagement scores on our PRINT<sup>TM</sup> rankings reflect this.

London 2012 will surely show that, for sponsor brands, it is up to them to make the social weather. Those that have actively engaged socially (and integrated social with their other activities) will surely be happy. Those that have not need to ask why.

But trying to organise legally against the inevitable proliferation of social, user-generated platforms seems to miss the point. If London 2012 has shown anything, it is that the social tide is unlikely to ebb any time soon.

# A sponsor's view



We took no account of individual sponsor strategies in this tracking study but adidas topped the PRINT™ Potential rankings at the end of both Games, so we asked them to summarise their London 2012 'Socialympics'.

Integration is the key to any successful marketing campaign and this was no better demonstrated than through our work at London 2012 with #takethestage. Social media was an integral part of our Olympic communications plan, acting as the main driver to landing our simple brand message – #takethestage, which constantly evolved and adapted across the Games to help tell the story in new, exciting and relevant ways.

Our social media objective was clear – bring our fans, and all sports fans, closer to the brand through our relationship with the athletes and the London 2012 Games at large. We wanted to offer exclusive access that only a brand like adidas can deliver. From bringing David Beckham to Twitter for the first ever time, to giving our online communities the chance to interview a gold medal winner after the race, we challenged traditional communication channels and created truly unique digital experiences.

Helping us to achieve this objective, our social media strategy was based on relevance and reactivity. To maintain trust, build credibility and drive engagement, it was important to show our relevance in the conversation as the leaders in sport, partners of Team GB and sponsors of the world's greatest athletes. We were strict with our communication and made sure our input was always adding value.

In all of the Olympic noise it's even more important to remember what you are trying to achieve and who you are trying to speak to – you will never be everything to everyone so stay true to your heritage and people will engage. The Olympic Games moves at such a fast pace that it's important a brand can move and adapt in line with it – our social media team was set up to react as close to real-time as possible during the events, in particular sharing visual content from the sport within 15 minutes of the athlete crossing the finish line.

By capitalising on the increased buzz and excitement, we were able to share moments with our fans, celebrating the success of the Games, our athletes and our nation's achievement in staging such a memorable Olympic Games, both offline and online.

Nick Craggs, UK & Ireland Marketing Director, adidas

## What was the real social ROI?

Two billion pounds is a lot of money, even spread across a lot of sponsors. So the question in many sponsor – and prospective sponsor – marketing forums in the coming months will be: was it really worth the effort, the time and the cash?

Some, like BMW, said publicly early on that it probably wasn't and that they won't be doing it again at Rio – at least not like this. Others, like P&G, have declared the opposite, that it was a resounding success. For most, the assessment will be a more private one, with praise and blame assigned (and lessons learned) behind closed doors.

But for many, if not all, of this year's sponsor brands, whether or not the purely social component of their sponsorship activation delivered a real return on investment will remain a mystery. Despite the London 2012 'socialympics' tag, social media is still the Cinderella of marketing and communications and, as so many of the Olympics campaigns showed, too often an afterthought in terms of sponsorship activation.

Determining a real ROI for social media should not be that difficult in theory – certainly no more so than for other aspects of integrated campaigns. Simply ask: (a) what were the specific

business objectives set for social and how was achievement quantified financially; and (b) how much money was spent specifically on social. Then divide (a) by (b) to determine the social ROI.

It would be tempting to think that all this year's sponsor brands have answers to these simple questions. In which case, an equally simple anonymous round-robin questionnaire might answer the larger question: did social media activation at London 2012 deliver a real overall ROI for sponsors?

Regrettably it is our view that, except in one or two cases, these answers do not exist at brand level. Most brands do not know how much was spent on social and they do not know what contribution social made to business performance. So we cannot, realistically, determine whether the XXX Olympiad – the first true 'socialympics' – delivered real social return. But it is also our view (and hope) that the requirement to calculate a real ROI for social is gaining momentum and that by the Rio Games, marketers will regard this as the norm.

## Conclusion

# What can sponsor brands learn from this year's Olympics to carry forward to Rio 2016?

We made no attempt to determine each brand's London 2012 social media strategy and therefore we cannot judge their individual success or failure. But our analysis of the comparative social performance of these brands and the changes over the four months of daily tracking does allow us to make some general observations.

## 1. Be a brand with a plan

It seems evident that some brands came well prepared with a plan for overall sponsorship activation and had included social media and networks in that. Some of these brands executed comparatively better than others.

But some brands either chose to ignore social media entirely – with no active channels or accounts at all – or to 'participate' in a haphazard, *ad hoc* manner. In a context where social media is a part of both the social and the media environment, this ostrichlike approach denies the whole purpose of being sponsors in the first place.

Nor can it be justified by B2B brands on the basis that their focus is on customer and influencer hospitality. That might be acceptable (just) in the context of day-to-day sports sponsorship but the Olympics are such a high profile consumer event that sponsoring it requires a different approach. B2B brands like Cisco managed to punch above their weight at London 2012; others can at Rio 2016.

#### 2. Engagement is the leveler

The biggest consumer brands with the biggest budgets were always likely to do well in our overall performance rankings. Marketing muscle is naturally reflected in social media.

But the PRINT™ methodology deliberately includes measures of how well brands are actively engaging and these differences were reflected in our *Potential* rankings. Here brands that were engaging in some kind of ongoing dialogue definitely fared better than those who used social media as just another broadcast marketing channel.

The lesson is that brands using social media as part of any sponsorship really need to focus on engagement and interaction

not just awareness and reach. The brands that have performed consistently well in our study are those that have found ways to engage with their audiences, and focus on the word 'social' rather than just 'media'.

## 3. Integration not isolation

Social media has the power to be a real integrator for other forms of marketing communications – but only if it is built-in from the start. The opportunity is lost if the social media component of sponsorship activation is carried out in isolation or simply tacked on as an afterthought. And integration ideally needs to be both conceptual as well as practical. Two stand out examples from London 2012 were P&G with its fully integrated, long-running and implicitly social 'Moms' campaign and EDF, with its late starting 'Energy of the Nation' campaign, converting 'social' energy to a physical lightshow.

Other qualitative and anecdotal studies will no doubt be made of the London Games and the wider lessons learned. We hope that this quantitative study will play its part in the context of social media and therefore provide food for thought for Olympics sponsorship planning and sports sponsorship thinking generally.

Tony Burgess-Webb

Niall Cook

# **Appendices**

## **Appendix I: About the authors**

#### **Anthony Burgess-Webb**

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A co-founder of Sociagility, Tony was previously chief marketing officer at international communications consultancy Hill & Knowlton, overseeing its formal and informal web presence and the introduction



of internal and external social media policies and practices. During a 25-year career during he also founded the firm's European technology practice and global digital practice. He cofounded brand research firm Commetric and equity trading company CommEq.

Married, with one daughter, he is also a pro bono advisor to Iwokrama, a rainforest preserve in Guyana.

#### **Niall Cook**

Before co-founding Sociagility, Niall was worldwide head of marketing technology at Hill & Knowlton where he pioneered the firm's use of social media including its blogging platform, Collective Conversation.



During a 13-year career at the consultancy, he also ran the digital practice. Before that, he held positions at Beenz, an internet payment pioneer, Answerthink Consulting Group, and global investment bank UBS. He is the author of Enterprise 2.0, one of the first books to explore the use of social media inside the enterprise.

Married, with one daughter, he is also a trustee of East Anglia's Children's Hospices.

# Appendix II: The PRINT methodology – a KPI for social media performance

Senior executives and social media strategists alike can struggle to find meaningful metrics to assess the impact of their social media activities. PRINT™, Sociagility's multi-channel social media performance measurement system, offers a solution.

The PRINT methodology measures five key attributes of social media performance: **Popularity, Receptiveness, Interaction, Network reach** and **Trust**. Each is measured across multiple social platforms and channels, including Twitter, Facebook and YouTube, using relevant metrics for each. The result provides direct competitor analysis and delivers specific, actionable insights into areas for improvement.

#### The PRINT Index<sup>™</sup>

At the heart of the solution is the PRINT Index<sup>™</sup> – a single number that shows overall performance compared to a defined set of competitors or brand, sector and geographical benchmarks. This can be used as a Key Performance Indicator by senior client management and social media strategists and by agencies. It has been proven to correlate strongly with brand value and growth and therefore provides a KPI for social media

performance that can be used to set and track targets. PRINT also analyses the key drivers of social media performance and provides indicators for all five attributes and all channels to help inform priorities for action.

#### **PRINT Reports**

PRINT reports can be one-off snapshots or continuous tracking studies. Each assessment is bespoke and provides comparative PRINT Index™ scores for a specific set of competitors. As well as a summary scorecard, detailed comparative scores and re-usable graphics are included for attribute and channel combinations. Commentary is given on high and low performers by attribute and channel and specific recommendations are offered for improvement.

#### **Benefits**

The benefits of PRINT include:

- more strongly correlated with brand value and growth than other 'influence' measures;
- more performance-focused, directly highlighting competitive (dis)advantages against customer-defined set of benchmark brands;

- more comprehensive because it measures multiple channels simultaneously;
- provides insights which are specific and actionable;
- more flexible provides a one-off benchmark 'snapshot' or a tracking mechanism;
- more meaningful PRINT provides a framework for action;
- more adaptable to suit more complex requirements,
   PRINT can be adjusted to reflect different audiences and organisations;
- easier to integrate into wider social media monitoring, analysis and planning;
- lower cost PRINT combines traditional research methodology with proprietary software across multiple platforms.

## **Appendix III: About Sociagility**

Sociagility is a consultancy focused on improving organizational competitive advantage by helping clients build their own inhouse social media capability. It was founded by two ex-WPP digital and social consultants, Tony Burgess-Webb and Niall Cook.

It works with big brands, small brands, non-profits and individuals and recent clients include the University of Reading, Groupon and Legal & General.

The firm provides solutions in three areas:

## Consultancy

We use our DISC (Diagnosis->Integration->Strategy->Capabilities) process to understand clients' commercial, marketing and communications goals and challenges, help them put social at the heart of their business operations, define objectives and action plans, align across departments and channels, and put relevant metrics in place.

## Benchmarking

Our analytic approach combines a traditional audit approach with our proprietary PRINT™ methodology, a multi-channel measurement system that correlates directly with brand value

and provides a KPI for marketers. It offers brands and organisations insight into the key drivers of their – and their competitors' – social media performance and provides a series of indicators to help determine priorities for action.

#### **Talent**

Our specialist recruitment division, Sociagility Talent, helps our clients create sustainable capability for the future by building inhouse social expertise. This includes discovering internal talent, seconding or recruiting the right people with the required skills, as well as ongoing training, mentoring and the transfer of knowledge and skills.

To find out more, please visit www.sociagility.com.