UNIVERSITY OF DERBY

THE DIGITAL DILEMMA: AN INVESTIGATION INTO SOCIAL MEDIA MARKETING WITHIN ORGANISATIONS

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Glossary

AB testing	A way of testing version A or version B of an advert to see which is most successful.
Buffer	A social media content management system with free and paid-for versions.
C-suite	Those in chief roles such as chief executive, chief marketing officer.
Check-Ins	Registering physical presence at the location of a brand’s social media network, such as a store.
Daily Active Users (DAUs)	Number of people active on a social media network each day (see MAUs).
DM-ing	Sending a Direct Message (DM) through a social media network.
DSMM	Digital, social media and mobile.
eWOM	Electronic Word of Mouth (see WoM).
Finitary relations	A finite (rather than infinite) number of connections, possibly controlled by the user.
Followers	The number of people who have followed a brand page or individual on a social media network.
Glassdoor	A website where employees and former employees anonymously review companies and their management.
Google AdWords	Google’s advertising platform.
Hits	A request to a server file to download an item onto a web page.
Hootsuite	A social media content management system with free and paid-for versions.
Hypertext mark-up language (HTML)	Computer code used to create websites.
Impressions	The number of times an individual has seen an advert online.
Likes	The number of people who have liked a brand page on a social media network.
Monthly Active Users (MAUs)	Number of people active on a social media network each month (see DAUs).
Online communities	Groups that meet online either anonymously or sharing their identity.
ONS	The Office for National Statistics.

Organic content	Content posted free of charge or non-advertising content.
Posts	Adding an item of content to a social media network.
Produsage	The act of produsing (see produsers).
Produsers	Concatenation of the words producer and user where users produce their own content (see produsage).
Social media networks	Networks that provide social media such as Facebook, Twitter, YouTube, LinkedIn and often used interchangeably with social media platforms and social network sites.
SoG	Stages of Growth.
SM	Social media.
SproutSocial	A paid-for social media management and monitoring system.
SurveyMonkey	An online survey tool with free and paid-for versions.
Trustpilot	Automated paid-for online review management system.
UKOM	UK Online Measurement company.
User generated content (UGC)	Content created by users who can be customers or other interested parties.
UTM	Urchin Tracking Module which is computer code that enables analytics programmes to recognise the source of the web visitor.
Vanity metrics	Online measurements which look good but provide basic or little value.
WA	Web analytics, including tools such as Google Analytics.
Wearables	Devices worn that provide technology such as Apple Watch, Nike Fuel Band, FitBit activity tracker.
Web 1.0	First generation of the web that was read-only with no functionality.
Web 2.0	Interactive content universally accessible through a standard interface (DiNucci, 1999, p. 32).
Web 3.0	Called the semantic web where machines understand commands and can perform actions (Choudhury, 2014).
Web 4.0	Not yet formally defined, but considered as the ‘read-write-execution-concurrency web with intelligent interactions’ (Aghaei, Nematbakhsh and Farsani, 2012, p. 2).
WOM	Word of mouth (see eWoM).

Declaration

The author declares that this thesis embodies the author's research and the originality (and contribution to knowledge) rests solely with the author.

In addition, the author declares no portion of the work referred to in this thesis has been submitted in support of an application for another degree or qualification to another University, or institution of learning.

The research has been ethically approved (see Appendix A for ethical approval confirmation).

Statement of Intellectual Ownership

Abstract

This thesis investigates different application of social media marketing within organisations and identifies critical success factors resulting in a strategic social media application framework for organisations. The context of this research is the organisational application of social media and whilst social media networks have been present since 1997, the utilisation of social media by individuals has been examined by many scholars. However its application to organisations remains an area requiring further research. Thus, to understand differences in social media marketing within organisations, this thesis has problematised the notion of generational cohorts and the presence or absence of formal marketing qualifications.

Following a pragmatist epistemology and ontology, this study has sought warranted assertions within a mixed-methods framework. An explanatory mixed-methods sequential design approach was adopted and for Research Phase One, an online survey within a set of closed online digital marketing groups was administered, to investigate the purposes of social media usage and affordances gained. This provided data from 448 respondents representing a variety of organisations, using social media at work.

The second research phase was qualitative semi-structured interviews with participants drawn from Research Phase One, which involved 26 semi-structured mixed-mode interviews, based on the participant's availability and location. The purpose of the semi-structured interviews was to explore critical issues raised in the online survey.

The thesis is informed by the construct of affordances – which involve opportunities for action and positive affordances provide benefits. These were harnessed to delineate the benefits of social media, within an organisational context.

This work provides original contributions to knowledge: The empirical research provides evidence of differences in social media marketing application between generational cohorts and those with and without formal marketing qualifications. There were statistically significant differences in the application of customer service, measuring results and managing social media interaction.

The research found that there was no classification for different types of social media managers. Furthermore, digital skills gaps were identified as digital natives were more likely to have formal marketing qualifications than digital immigrants. Thus following the pragmatic principle, working typologies were presented for those using social media in organisations to better frame training and social media management.

The critical success factors within organisations were justifiably warranted which asserted social media affordances for organisations: brand management, customer segmentation, customer service, interaction (engagement), entertainment, remuneration (offers), and sales cycle (testimonies and reviews). Two critical factors were confirmed: clear strategy and vision for social media management, and measure results from social media. These social media affordances were applied at varying levels of maturity and this led to the development of social media affordances maturity scale, that is grounded in a pragmatist epistemology bringing utility and understanding for organisations.

This thesis identifies differences in social media marketing within organisations and in accordance with its aim, ascertains the critical success factors and develops frameworks for social media application in organisations.

Acknowledgements

Undertaking a PhD is like a mystery journey.

The destination is not clear, the equipment, supplies and skills needed along the route are unknown. As I can see land again, it is time to reflect and thank those for helping me reach the end of the beginning.

In my PhD journey there have been expert pathfinders, first my Director of Studies, Dr David Longbottom whose immortal words ‘are you sure?’ will forever be present when I am conducting research. My second supervisor, Dr Alison Lawson, a time traveller, who could spot distractions along the route. Whilst at the University of Derby, Professor Nik Bessis, was a temporary and insightful supervisor just after the point of embarkation.

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- Professor Mike Jones for asking ‘are we there yet?’ whenever we spoke.
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Dedication

To my parents who crossed the water
and were enthusiastically present
when the expedition was planned
but sadly left on a different journey
before I reached my destination.
Ar dheis Dé go raibh a n-anam.

To my sister
a brilliant yet modest scholar
in a different domain
in another country
who was there.

To my husband Nick
for making all things possible
#awesome

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PART 1: INTRODUCTION

Chapter One: Introduction

1.1 Chapter introduction

The thesis investigates social media marketing within organisations and identifies the critical success factors using the lens of affordances theory. It subsequently presents a framework for social media application within organisations, which will better inform practitioners and researchers, thus this study is founded in a pragmatist ontology and epistemology, initiated by the researcher's beliefs and using range of methods, with the emphasis on practical outcomes (Dewey, 1905; Ormerod, 2006; Saunders et al., 2016).

The objectives of this introduction chapter are to provide the background and context to the research. This commences with the history of marketing thought and the introduction of marketing management and subsequently the concept of marketing as practice, in order to situate this study. This leads into further explication of social media to demonstrate its growth and interest for organisations. This chapter will present a rationale for the study and provide an overview of the thesis structure.

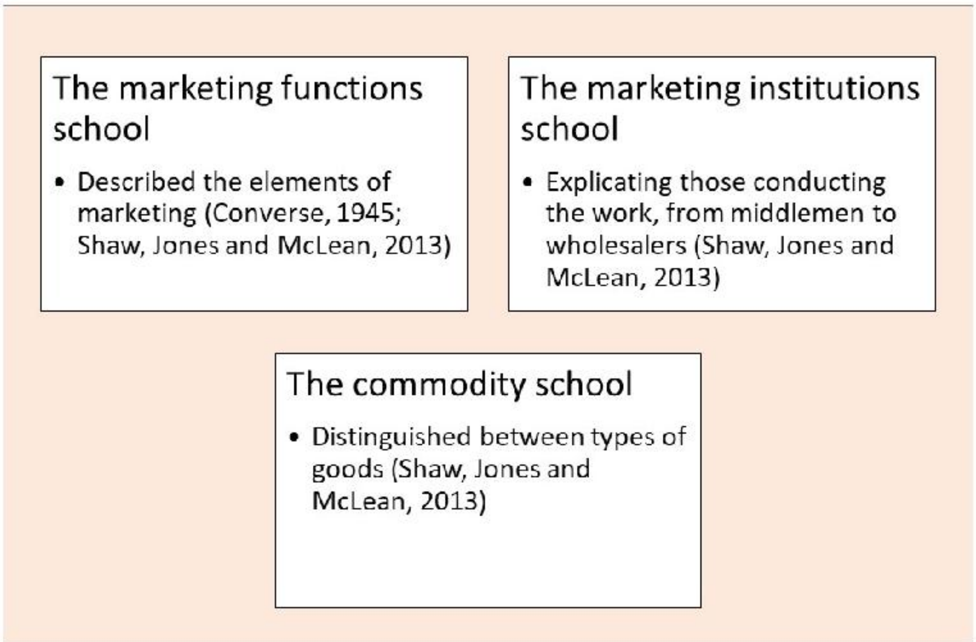
1.2 Marketing in context

1.2.1 The history of marketing thought and the introduction of marketing management

The context of this research is social media marketing within organisations which is situated within the management of marketing. Thus it is helpful to recognise the antecedents to the management of marketing and according to Hunt (2010), understanding the history of marketing practice and thought is essential within doctoral education and therefore this section presents the setting for this thesis within an historical context.

Before 1990 is described as a time of Pre-Academic Marketing Thought (Shaw and Jones, 2005, p. 241), where marketing was embedded with economics (Wilkie and Moore, 2003; Kassarjian and Goodstein, 2013). The subsequent emergence of Era I: “Founding the Field of Marketing” (1900–1920) by Wilkie and Moore (2003, p. 117), witnessed the development of the classical schools (Sheth and Gross, 1987). Figure 1.1 shows the variations of the classical schools of marketing.

Figure 1.1 The classical schools of marketing



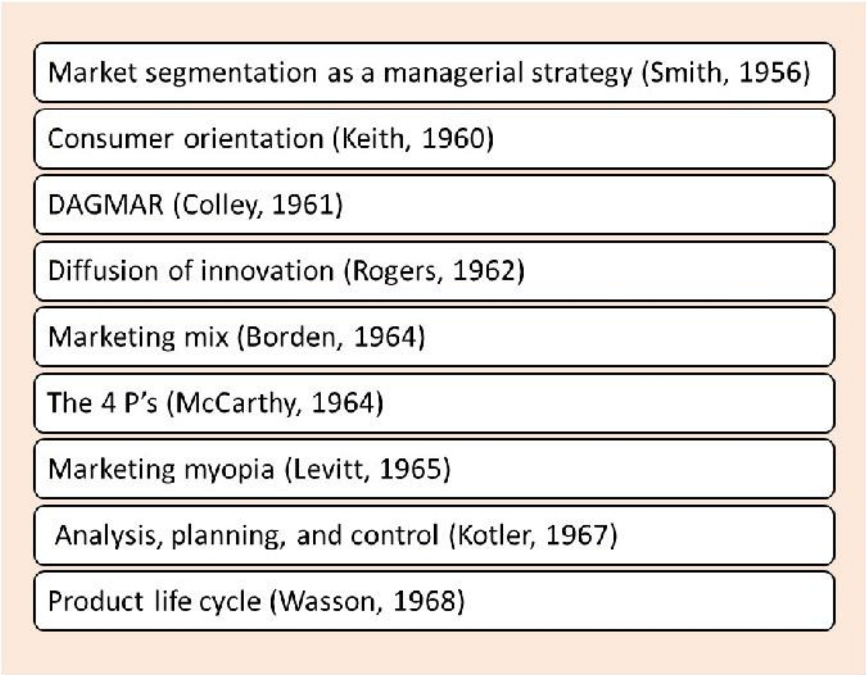
At this time the first university courses developed as marketing was recognised as a field of study (Wilkie and Moore, 2003). According to Wilkie and Moore (2003), the domain of marketing further evolved with Era II: “Formalizing the Field” (1920–1950), which saw marketing becoming more established with the launch of the Journal of Retailing in 1925 and subsequently the Journal of

Marketing in 1936, which illustrated that marketing was moving into university curricula. Aspects of marketing were developed as the interregional trade school considered the geographical place of marketing (Shaw, Jones and McLean, 2013), and at the close of this era the marketing management school was introduced (Alderson, 1957; Kotler, 1967; Sheth and Gross, 1987; Jones, Shaw and McLean, 2013), and most notably the marketing concept was created (Converse, 1945).

As the United States economy significantly expanded, Era III: "A Paradigm Shift in the Marketing Mainstream - Marketing, Management, and the Sciences" (1950–1980) materialised (Wilkie and Moore, 2003, p. 123). This epoch was also defined as the 'Paradigm Shift' (Shaw and Jones, 2005, p. 241), where businesses were seeking pragmatic solutions to problems - how managers should market goods to customers. This move demonstrated the significant growth of marketing as a business and management discipline, as evidenced by the growth of business qualifications, with the number of bachelor's degrees increasing from 42,816 at the start, to 184,867, at the end of the era, similarly number of Master's degrees rose from 3,280 to over fifty thousand in the same time period (Wilkie and Moore, 2003, p. 124), indicating the appeal of the application of marketing within business.

Thus marketing management developed as a school of thought in the mid-twentieth century (Jones, Shaw and McLean, 2013), providing practical guidance on the process and function of marketing products and services within organisations. The 'Marketing Management School' (Möller, Pels and Saren, 2013, p. 154) adopted a pragmatic value-driven approach (Saunders *et al.*, 2016, p. 137), that focused on finding solutions to problems (Möller, Pels and Saren, 2013; Creswell and Plano Clark, 2018). This was demonstrated with a series of marketing constructs being proposed, which provided useful application for business and hence these frameworks included (Wilkie and Moore, 2003), those shown in Figure 1.2.

Figure 1.2 Marketing management constructs for business



Thus according to Easton (2002, p. 103), this was a time where 'marketing was transformed from a discipline that was variously described as descriptive and qualitative in orientation to one that wholeheartedly espoused rigor and quantification' and thus marketing as a science and as a provider of solutions for business was acknowledged.

The early marketing management field was led by Alderson (1957), and whilst these notions provided functional constructs for marketing managers, they became the core materials for Philip Kotler's best-selling marketing management textbook (Kotler, 1967), elements of which remain in current usage by the UK's professional marketing institute (Chartered Institute of Marketing). However, this school of thought was later criticised for failing to consider interaction and relationships (Möller, Pels and Saren, 2013), thus Kotler and Levy (1969), expanded the concept of marketing beyond the typical realms of profit-making corporations, as a notion that applied to all organisations and consequently, the focus moved towards consumer behaviour

(Sheth, 1967, 1968; Jones, Shaw and McLean, 2013), which resulted in the development of behavioural learning theories (Kassarjian and Goodstein, 2013), including the theory of buyer behaviour (Howard and Sheth, 1969).

According to Wilkie and Moore (2003, p. 132), this was followed by Era IV: 'The Shift Intensifies - A Fragmentation of the Mainstream', which they considered as commencing in 1980 to the present. Whilst they explicated the disintegration of command economies in communist countries, there was a move from local to global business – and international business qualifications. However, the requirement for practical business methods 'for successful enterprise' remained (Wilkie and Moore, 2003, p. 132) a key factor. This belief in the application of usefulness for organisations is ever-present and a core tenet of two of the leading business publications, the Harvard Business Review (Hoch and Bernstein, 2016), and Business Horizons, which, in keeping with this study, follows a pragmatist ontology and epistemology 'identifying important business issues or problems and recommending solutions' (Elsevier, 2018, p. 3).

At a similar time, Shaw and Jones (2005, p. 240,) classified this era as 'Paradigm Broadening', from circa 1975 to 2000, which acknowledged that the construct of marketing had been extended from businesses to all entities, thus introducing the notion of customers and marketing processes in non-profit organisations, a concept that had been suggested by Kotler and Levy (1969). This study has embraced this view and incorporated all organisations within the empirical research, rather than focusing solely on those obliged to make a profit. Subsequently, this era saw the launch of further academic marketing publications (Wilkie and Moore, 2003), signalling a more specialist approach to marketing, for example, the Journal of Macromarketing (1981), Journal of Public Policy & Marketing (1982), Journal of Consumer Marketing (1983), and the Journal of Interactive Marketing (1987). Whilst marketing continues to be located in this fourth era, the next era has been suggested by Hunt (2018, p. 38) as commencing in 2020 and being a time of promising and problematic prospects – the promise lies in the long-established field of marketing whereas the problems concern marketing being less influential than other disciplines.

Whilst still in era IV, the foundations for this study were therefore established in the Marketing Management School, which adopted a pragmatic value-driven approach (Saunders *et al.*, 2016, p. 137), aiming to find solutions to problems (Möller, Pels and Saren, 2013; Creswell and Plano Clark, 2018). This pragmatist ontology and epistemology continues to feature in leading business publications (Hoch and Bernstein, 2016; Elsevier, 2018), and thus the broader organisational application of social media marketing, which contributes to the management of marketing literature, is the basis for the empirical work presented in this thesis.

The next section will consider marketing as practice to explicate the location of this study within the application of utility for organisations, providing pragmatic 'practical bearings' (Peirce, 1878, p. 293).

1.2.2 Marketing as practice

According to Marion (2006, p. 247) there are three layers to marketing: (i) a long-established practice connected with marketing professionals and practitioners that developed long before academic exploration; (ii) knowledge applied by marketers based on the doctrine emanating from the 1950s - although they claimed that its roots were in university education, using the example of a course in product marketing - found at the beginning of the 1900s (Hackley, 2009b); and (iii) an ideology connected to perspectives and values. These strata and different demands of this domain explicate the dichotomy between marketing theory and application, an issue which has been considered by many scholars (see for example Skålén and Hackley, 2011). The notion of marketing as ideology, has been attributed to a lack of functional or practical purpose for organisations (Cornelissen, 2002; Hackley, 2009a), and is grounded in the belief that academics build theory and that practitioners adopt pragmatic approaches (Cornelissen, 2002).

These differing views, which some scholars have described as bifurcated (Catterall, Maclaran and Stevens, 2002; Hackley, 2009b), have highlighted the need for further research (Glanfield, Wolf and Burke, 2018), especially where academia has failed to provide guidance or maintain pace with emerging themes (Moorman and Day, 2016; Kumar, 2017), yet criticisms remain of its applied functionality (Hackley, 2009a). Therefore this thesis is concerned with Marion's (2006), first layer, marketing as practice, and recognises the functional and technical qualities of marketing, whereby the domain is seen as an applied management field (Hackley, 2009a), which enjoys universal usage within organisations as 'an artefact of the twentieth century' (Kitchen and Sheth, 2016, p. 1907). As the focus of this study is located within an organisational setting, it further responds to the need for greater empirical research into marketing execution amongst organisations (Skålén and Hackley, 2011; Glanfield, Wolf and Burke, 2018).

Thus this study aims to investigate social media marketing within organisations to identify critical success factors and develop a framework for social media application in organisations. However, it has been observed that the academic literature on social media marketing has grown in recent years, for example, offering insights into the marketing and branding of products and services via social media platforms (e.g. Hollebeek, 2011; Rapp et al., 2013; Fulgoni, 2015; Habibi et al., 2014). Yet, Oberoi, Patel and Haon (2017, p. 11), remarked that 'the literature on social media is recent and empirical research is limited' and thus this thesis contributes towards the empirical research, as a gap in the treatment of social media within organisations remains. Moreover, as a developing domain, social media scholars witnessed the launch of a new journal, Social Media + Society, in April 2015, which claims to be 'dedicated solely to the publication of original work in the field' (Sloan and Quan-Haase, 2017, p. 2).

According to Marion (2006, p. 260), when discussing the role of marketing professionals ‘To practice marketing those people need principles and tools’ and thus as pragmatism has been described as ‘a philosophy that invites deep commitment to practice’ (Fendt, Kaminska-Labbé and Sachs, 2008, p. 480), it is a good fit for this study, with the research aim focused on providing an applied framework for organisations, with practical utility.

The next section considers social media and further illustrates the background to this study, to demonstrate its growth and interest for organisations and hence why this is an area that requires further investigation.

1.3 Social media

In researching social media one factor which emerged is that there is no universally agreed definition of social media and whilst this notion is discussed further in Chapter Two, it is recognised that the most frequently used definition is ‘Social Media is a group of Internet-based applications that build on the ideological and technological foundations of Web 2.0, and that allow the creation and exchange of User Generated Content’ (Kaplan and Haenlein, 2010, p. 61). However for the purposes of this study, the following definition will be adopted, formulated by the researcher and explained in Chapter Two:

> Social media is the facilitation of interactive, connected, marketing purposes at organisational, peer-to-peer and personal levels.

Social media networks have been present since 1997 with the earliest social media network recognised as the now defunct SixDegrees (boyd[1] and Ellison, 2007). The most dominant current social media network in the USA and Europe is recognised as Facebook, launched in 2004 and at the time of writing, comprised over one billion active users.

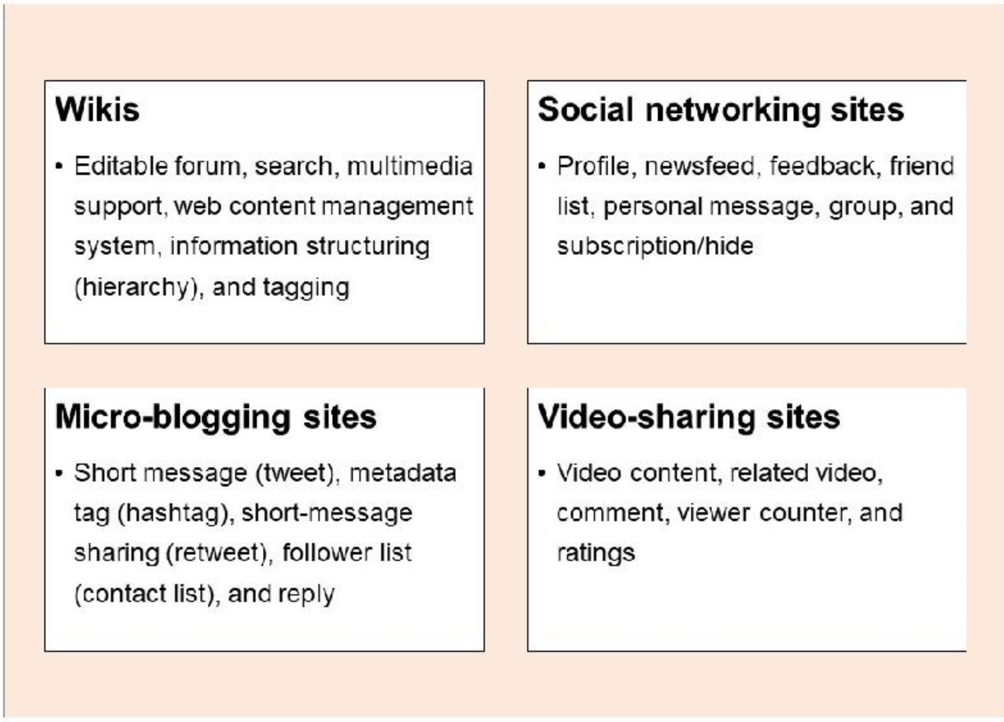
[1] danah m boyd legally changed her name to lowercase, see https://www.danah.org/name.html

The history and evolution of social media has been well-documented (O'Reilly, 2005; boyd and Ellison, 2007), and types of social media have been classified (Mangold and Faulds, 2009; Kaplan and Haenlein, 2010). As an example, the Interactive Advertising Bureau (IAB) considered types of social media in 2009, to illustrate advertising opportunities (Interactive Advertising Bureau, 2009). The IAB provided three elementary categories of social media tools: (i) social media sites; (ii) blogs; and (iii) widgets and social media applications.

Focusing on the format, rather than the function, this was a simplistic grouping which failed to describe the purpose or usage. However, this was one of the earliest classifications, created in 2009 when revenue for internet advertising in the United States amounted to $22.7 billion (PricewaterhouseCoopers, 2010) which had more than doubled to $59.6 billion by 2015 (PricewaterhouseCoopers, 2016). This designation evolved as Argyris and Monu (2015) researched the corporate use of social media and focused on four types of tools, including social media sites and granulating these with two other options; micro-blogging and video-sharing. They additionally suggested wikis were included and this is shown in Figure 1.3. Their research was based on a survey via the Harvard Business Review in 2013, which identified the instruments 'most commonly used for external communications' (p. 141).

Argyris and Monu (2015), concentrated on structural or backbone features and similar to Kaplan and Haenlein (2010), they commented 'listing all existing features of the four tools is not feasible or necessary because many tools are being constantly adapted and upgraded as the technology advances' (p. 149). This study has equally embraced this approach of not listing all social media networks identified in the research phases.

Figure 1.3 Prominent features of the four social media tools



Source: Argyris and Monu (2015, p. 149).

The tools identified by Argyris and Monu were all named in a guide for researchers by Cann, Dimitriou and Hooley (2011), as shown in Table 1.1 which provided a wider set of utilities and a more comprehensive frame around the specific functional areas of communication, collaboration and multimedia. The core of this classification described individual utilities embedded within three key overarching functions. It was rich in 'commonly-used tools' (p. 7), and inevitably over time, there have been changes. Notably, some of the platforms originally identified in this work have ceased operations (identified as 'platform closed after 2011') and some new systems have been launched (noted as 'platform started after 2011').

The usefulness of this construct is that these concepts are aligned to potential organisational purposes, as well as the type of usage by individuals.

Table 1.1 Classification of social media tools

FUNCTION	UTILITY	COMMONLY-USED TOOLS	PLATFORM CLOSED AFTER 2011	PLATFORM STARTED AFTER 2011
Communication	Blogging	Blogger, LiveJournal, TypePad, WordPress		
	Microblogging	Twitter, Yammer	Google Buzz	
	Location	Foursquare, Facebook Places	Gowalla	Swarm
	Social networking	Facebook, LinkedIn, MySpace		Pinterest, Instagram
	Aggregators	Netvibes, iGoogle	Google Reader, Pageflakes	Feedly
	Messaging			Facebook Messenger, Snapchat, WhatsApp
Collaboration	Conferencing	Adobe Connect, GoToMeeting, Skype		
	Wikis	PBworks, Wetpaint, Wikia		
	Social bookmarking	Diigo, BibSonomy	Delicious	
	Social bibliography	CiteULike, Mendeley		
	Social news	Digg, Reddit, Newsvine		
	Social documents	Google Docs, Dropbox, Zoho		
	Project management	Bamboo, Basecamp, Huddle		Trello
Multimedia	Photographs	Flickr, Picasa, SmugMug		
	Music			Spotify

FUNCTION	UTILITY	COMMONLY-USED TOOLS	PLATFORM CLOSED AFTER 2011	PLATFORM STARTED AFTER 2011
	Video	Viddler, Vimeo, YouTube		
	Live streaming	Livestream, Ustream	Justin.tv	Periscope
	Presentation sharing	Scribd, SlideShare, Sliderocket		
	Virtual worlds	OpenSim, Second Life, World of Warcraft.		

Source: Adapted from Cann, Dimitriou and Hooley (2011).

One notable change from the original classification by Cann, Dimitriou and Hooley (2011) is that within the communication function, the element of 'messaging' has appeared, signalling the emergence of changing communication formats within social media networks.

Considering the wider digital marketing environment and the integration of social media, Hooley, Marriott and Wellens (2012), provided a historical timeline of the internet. Thus the origins of online social media started with the concept of the internet, as a military tool, described by Dr Licklilder at the Massachusetts Institute of Technology as a 'a globally interconnected set of computers through which everyone could quickly access data and programs from any site' (Leiner *et al*., 1997, pp. 102-103). Whilst these conversations and concepts took place in 1962 it was a further 27 years before the world-wide web became available.

The subsequent development of mobile telephony, facilitated the accessibility of social media networks and signalled a change in culture towards communication (Heller, 2006). The significant date is 2007 when the first iPhone was launched (Apple, 2007) and when Facebook created a mobile accessible version (Facebook, 2006; Facebook Inc, 2018a), immediately increasing accessibility to the social media network and the number of users.

The evolution of the internet in terms of its impact on marketing has continued to grow as has the body of research into online marketing. In 2016 Lamberton and Stephen reviewed 160 articles in the major marketing journals to identify four eras of marketing within digital, social media and mobile (DSMM).

The first era (2000–2004) acknowledged the impact of the internet as consumers gained the ability to build online connections, use the internet as a buying research tool and assist buying decisions. Whilst Lamberton and Stephen (2016) noted issues with practitioners and their lack of adoption of social media, the reasons why were not fully explored. It appeared that practitioners were cautious, although this may have been fear, as well as the lack of understanding, as they acknowledged ‘practitioners did not appear to feel well-informed’ (p. 155). At this time there were no recognised digital marketing qualifications available in the United Kingdom and the formal marketing qualifications that were available did not address digital marketing. This lack of formal education may have contributed towards the overall concern within the application of social media.

The second era (2005–2010) saw the locus of control shifting towards consumers as online word of mouth (WOM) was recognised and the social media networks gained greater attention. Partly due to quotidian internet access, along with the rise of social media, as observed by Lamberton and Stephen (2016, p. 156), ‘platforms eventually referred to as “social media” moving from niche markets to mainstream use’.

This dissertation started towards the end of 2013 which according to Lamberton and Stephen (2016) was in the third era, *the age of social media* (2011–2014). This was the time when social media access became ubiquitous, coupled with consolidation and greater refinement of the platforms.

The current era (2015-present) represents a ‘postdigital world’ (Lamberton and Stephen, 2016, p. 162) as consumers have moved from being connected to an always-on state. This is evidenced as 92 per cent of UK adults and 90 per cent of American adults own a mobile phone and 83 per cent of UK adults and 77 per cent of American adults use a smartphone, facilitating check-ins, posts and communication with brands at any time of the day (Ofcom, 2018; Pew Research Center, 2017, 2018).

Research into social media has considered different areas such as online communities (Kozinets, 1999; Muñiz, Jr. and Schau, 2007; Adjei, Noble and Noble, 2009; Wilcox and Stephen, 2013), user types in varied settings (Muntinga, Moorman and Smit, 2011; Tsai and Men, 2013; Whiting and Williams, 2013; Bulut and Dogan, 2017) and the consumer experience (Pham, 2013; Lemon and Verhoef, 2016).

As social media networks have continued to grow, their scale is illustrated in Table 1.2 with a summary of the main social media networks in Western Europe and the USA. This demonstrates that these social media networks provide significant numbers of users or potential customers, which became a focus for organisations (Wattanacharoensil and Schuckert, 2015).

Table 1.2 Overview of main social media networks in chronological order of when founded

PLATFORM	ESTABLISHED	WORLDWIDE MONTHLY USERS (AT DATE)	OWNERS	REVENUE MODEL	SOURCE
LinkedIn	2002	562 million (January 2019)	Shareholders via Microsoft (NASDAQ)	Recruitment Advertising Membership	https://about.linkedin.com/
Facebook	2004	2.27 billion (September 2018)|	Shareholders (NASDAQ)	Advertising	https://investor.fb.com/home/default.aspx
YouTube	2005	1 billion (no date)	Shareholders via Google / Alphabet Inc (NASDAQ)	Advertising	https://www.youtube.com/yt/advertise/en-GB/
Twitter	2006	326 million (September 2018)	Shareholders (NYSE)	Advertising	https://investor.twitterinc.com/
Instagram	2010	1 billion (January 2019)	Shareholders via Facebook (NASDAQ)	Advertising via Facebook ads platform	https://investor.fb.com/home/default.aspx
Pinterest	2010	250 million (January 2019)	Privately owned	Advertising	https://business.pinterest.com/en

Considering each of these social media networks, firstly, LinkedIn, which is a business to business, rather than business to consumer, social media platform, also described as a ‘corporate social networking’ tool (Majchrzak, Cherbakov and Ives, 2009, p. 103). The platform has subsequently been purchased by Microsoft and is likely to be embedded into the IT company’s ecosystem. It is notable that LinkedIn has a mixed revenue model, earning most income from recruitment solutions, not promotional advertising, unlike the other platforms. As a business to business system, it generated an income via membership packages, enabling members to access different levels of network data.

Facebook has grown to over one billion monthly active users and its core value proposition to advertisers, is access to its user base, which contains rich sources of data, although its recent business practices have raised many questions, for example unwittingly selling adverts to fake Russian accounts during the 2017 US presidential election (Musonera and Weber, 2018) and breaching data protection regulations (Ram and Kuchler, 2018). With a user base that is larger than the populations of most countries, except China and India, Facebook is subject to external scrutiny, especially after its stock-exchange listing. To monitor the numbers of claimed users, it reports user measurements, named ‘Monthly Active Users’ (MAUs) and ‘Daily Active Users’ (DAUs) which inspired other social media networks to adopt the same measurement terminology (Facebook Inc., 2012).

YouTube continues to claim over 1 billion monthly viewers (YouTube, 2019) although there is no documented evidence for this because the company is owned by Google and thus all figures are amalgamated into the holding company’s financial accounts.

Twitter, established one year after YouTube, has smaller user numbers although like Facebook, it is listed on the stock exchange and as such has shareholders controlling its destiny. Its income is derived from advertising (Twitter Inc., 2018).

Instagram is the next largest social media platform and is popular within the fashion sector (Park, Ciampaglia and Ferrara, 2016). Owned by Facebook, it is therefore subject to the equivalent legal levels of enquiry regarding user numbers. It offers organisations the added benefit of access to the same online advertising campaign management system, within Facebook.

The smallest platform in Table 1.2 is Pinterest. A niche social media platform, popular with early adopters (Gilbreath, 2014), Pinterest started as an invitation-only platform, quickly gaining attention and creating demand amongst those who had not received the invitation. Whilst it is the smallest platform in this table, its user base is still larger than the population of every country in Europe.

The growth of social media networks has changed the relationship between businesses and customers. In just over ten years, Facebook has become consistently recognised as one of the world's most valuable brands (Badenhausen, 2013; Brandz, 2017) in spite of various high profile issues such as the data sharing disclosures with Cambridge Analytica (Facebook Inc, 2018b). Lamberton and Stephen observed that in practice, digital marketing had become crucial, although there was a paucity in methods of management.

Having considered the social media environment, the next section presents the rationale for this study.

1.4 Rationale for the study

Initially considered as a passing phase, the concept of social media as a fad has been removed (Quinton, 2013; Bonsón, Royo and Ratkai, 2015) and has been evidenced by its continued growth as nearly three billion people from a worldwide population of over 7.2 billion use social media (Gray, 2017; United Nations Population Division, 2017) and within the United Kingdom, the latest data from the Office for National Statistics (2017b) indicated that 66 per cent of adults used the internet for social media access and 77 percent of internet users have a social media profile (Ofcom, 2018). Additionally, social media usage within businesses in the UK is increasing according to the Office for National Statistics (2017a) which stated that 63 per cent of businesses with ten or more employees used social media, an increase of twenty per cent since 2013. In this context no specific platforms are named and social media is broadly described as: social networks; business blogs or microblogs; multimedia content sharing websites; and wiki based knowledge sharing tools.

Therefore brands have demonstrated their enthusiasm to harness the potential of social media (Argyris and Monu, 2015) and considering the range and scale of social media, it is understandably attractive for organisations, which are keen to use social media to engage with their customers (Powers *et al.*, 2012; Sashittal, Sriramachandramurthy and Hodis, 2012), although many have become spectators (Kaplan and Haenlein, 2010) as democracy rules in corporate communications and customers are in control (Kietzmann *et al.*, 2011).

Whilst some organisations have succeeded in this quest to capture customer attention, others, including major brands, have failed publicly (Gallaugher and Ransbotham, 2010; Labrecque, 2014), for example, the international fast food company McDonalds, misunderstood use of a Twitter hashtag (Lubin, 2012; The Telegraph Foreign Staff, 2012) and another international icon, Coca Cola, created and shared inappropriate holiday greetings with its customers in Russia, via the Russian social media network VKontakte (VK). Coca Cola's failure comprised of a politically sensitive map of Russia which initially excluded Crimea and after protests, was subsequently revised and the annexed state was added, resulting in further protests and boycotts from Ukrainians. The result was formal public apologies issued to the relevant embassies (Mackey, 2016).

The Office for National Statistics (ONS) identified the main uses of social media by UK businesses (Office for National Statistics, 2017a) as: (i) promotion and brand awareness, (ii) customer service, (iii) product development, (iv) collaboration and knowledge sharing, (v) recruitment, and (vi) communication. These themes are explored further throughout this study.

Whilst the ONS provided examples of usage of social media for business, organisations gain additional benefits from social media including: influencing purchase decisions (Zhang, Craciun and Shin, 2010); launching new products and product placement (Dobele, Steel and Cooper, 2015; Liu, Chou and Liao, 2015); and customer relationship management (Hennig-Thurau *et al*., 2010; Harrigan *et al*., 2015; Verma, Sharma and Sheth, 2015; Kumar *et al*., 2016).

Social media may now be quotidian and as noted by Zhang *et al.* (2017, p. 24) ‘although no longer new, social media still presents marketing professionals with challenges as they struggle to understand how it is changing the business environment and attempt to identify opportunities for effectively leveraging online social media channels (e.g., Facebook, Twitter) in ways that drive value’. The gaps in knowledge concerning the application of social media within organisations is acknowledged by Lamberton and Stephen (2016) who stated that there is still concern in this period ‘in understanding how digital (and particularly social and mobile) activity generates quantifiable marketing outcomes of value’ (p. 163).

This justification for this study is further reinforced by articles that have further explored digital and social media marketing, such as the work by Lamberton and Stephen (2016), and Kannan and Li (2017), which have continued to recommend the need for practitioners and academics to work together to mitigate the gap between research and practice, calling for clarity in the application of social media to business. The argument concerning the divergent positions between academe and organisations has existed for many years and thus Fendt, Kaminska-Labbé and Sachs (2008), proposed a return to pragmatism as a solution to this recognised divide and as a way to provide relevant management knowledge.

Thus, as the clarion call for more research into the domain of social media and its application to organisations continues and the lack of empirical evidence within an organisational setting remains, there is a gap in the treatment of social media marketing within organisations. Therefore, this study is timely and especially relevant in its investigation into social media application within organisations.

1.5 Aim and objectives

The aim of this thesis is to investigate social media marketing within organisations to identify critical success factors and develop a framework for social media application in organisations.

This is underpinned by three objectives which when combined, will address social media marketing in organisations and these can be expanded into specific purposes and individual research questions as shown in Table 1.3.

Table 1.3 Explanatory scope of research

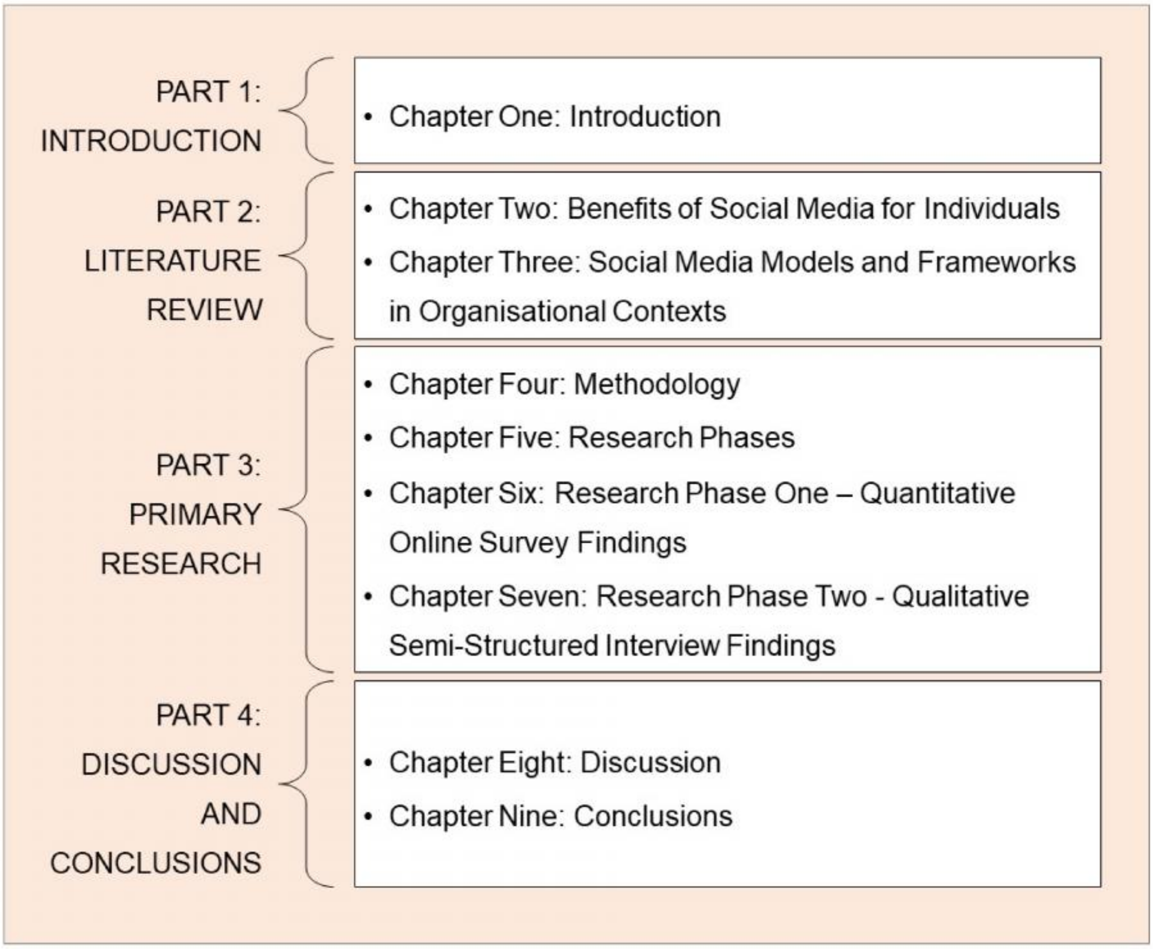
RESEARCH AIM To investigate social media marketing within organisations in order to identify critical success factors and develop a framework for social media application in organisations.		
RESEARCH OBJECTIVES	**RESEARCH PURPOSE**	**RESEARCH QUESTIONS**
1: To review the literature on social media and social media application in organisations in order to identify critical success factors.	To gain understanding of the landscape and the essence of social media and factors in different usage.	1. What is social media? 2. Why do individuals use social media? 3. Are there different types of social media users? 4. Are there differences in social media usage based on generational cohorts?
	To understand the usage and benefits of social media in an organisational setting.	5. How can organisations use social media? 6. What supplementary opportunities do social media offer organisations? 7. What are the critical factors in social media usage for organisations? 8. Are there guidelines for the application of social media within organisations?
2: To conduct primary research in order to determine and evaluate current social media marketing application within organisations.	To investigate the critical success factors within organisations.	9. Are there differences in social media marketing application based on generational cohort? 10. Are there differences in social media marketing application based on formal marketing qualifications? 11. What are the significant differences?
	To investigate the significant factors in social media marketing application.	12. Why do the significant differences exist?
3: To recommend guidelines for social media application within organisations.	To identify best application in social media marketing.	13. What are the guidelines for best application in social media marketing in organisations?

The scope of this work is social media marketing within organisations and thus excludes analysis of individual platforms and the devices or formats upon which they are accessed.

1.6 Thesis structure

The structure of the thesis is shown in Figure 1.4, which is in four parts, with nine chapters.

Figure 1.4 Thesis structure



Part 1 comprised the introduction to provide the rationale for the study, as well as a background to the social media networks and why organisations are interested in pursuing its application. This chapter has demonstrated that as consumers have moved into an era of being constantly connected (Lamberton and Stephen, 2016), organisations continue to struggle to manage social media and thus the need for further research and guidance into the area of social media application for organisations remains.

Part 2 contains the literature review which is in two chapters as one addresses individual usage of social media and the other considers organisational application of social media, as follows:

Chapter Two investigates definitions of social media and subsequently the benefits of social media from the perspective of individuals, to inform the factors surrounding the application of social media for organisations. Individual behaviour within social media networks is synthesised to understand the different user clusters which contributes towards Research Phase One, to identify whether organisations gain a benefit in segmenting customers. This chapter reviewed generational cohorts and whether this was a valid construct to adopt in the research phases. Having argued the usefulness of situating the research within a binary age context, the chapter considered the role of skills in the usage of social media. Concluding with the identification of critical factors in the user purpose of social media, this chapter provided areas to explore with the research phases.

Chapter three investigated social media models and frameworks with organisational contexts. The contribution of this chapter was the identification of the critical benefits of social media for organisations which are viewed through the lens of affordances theory. To facilitate the assessment of an affordance, a criteria model was applied which resulted in the recognition of thirteen critical factors in the organisational use of social media. Guidelines for the organisational application of social media were synthesised and thus contributed the components which may facilitate or impede application of social media marketing.

Part 3 contains the primary research, with Chapter Four presenting the research philosophies and justifying the pragmatist epistemology and ontology within a mixed-methods approach, to answer the research questions posed in this study. To evaluate the research and ensure the quality of the study, the Good Reporting of A Mixed Methods Study (GRAMMS) guidelines (O'Cathain, Murphy and Nicholl, 2008), are adopted. GRAMMS provides a sequential approach to assessing the mixed-methods approach, mirroring a pragmatist sequential model (Morgan, 2014), and are followed throughout the study. Having agreed the approach, an argument for an explanatory mixed-methods sequential design is tendered, demonstrating why this approach more closely meets the needs of the study.

Chapter Five explained the research phases within the explanatory mixed-methods sequential design and justified the rationale for Research Phase One, the online survey and Research Phase Two, semi-structured interviews. Issues of validity of both methods were addressed and the data collection methods were presented, demonstrating how chapters two and three contributed to the formulation of the research design.

Chapter Six reported the results from the online survey and highlighted specific findings. From this, Chapter Seven presented the findings from the semi-structured interviews and identified key themes that emanated from the participants within different organisations. This chapter concluded the primary research.

Part 4 comprised the discussion and conclusions, with Chapter Eight, Discussion, which integrated the findings from both research phases. Finally, Chapter Nine provided the conclusions to the study and demonstrated the contribution to theory and implications for practice. Furthermore, methods to disseminate the work and areas of further research were presented.

Additionally, this thesis has adopted a characteristic of mixed methods research, which is to provide content visually, in order to highlight important information (Collins, Onwuegbuzie and Jiao, 2006; Lurie and Mason, 2007; Tashakkori and Teddlie, 2010).

1.7 Chapter conclusions

This chapter has evidenced the requirement for research in order to justify the topic and has explained the purpose of the study, as social media has now entered its fourth era (Lamberton and Stephen, 2016).

The explanatory scope of research has illustrated the research objectives and the subsequent research questions which flowed into the thesis structure. The structure which has been provided contributes towards the framework which will be followed to investigate social media marketing within organisations in order to identify critical success factors and develop a framework for social media application in organisations.

PART 2: LITERATURE REVIEW

Chapter Two: Benefits of Social Media for Individuals

2.1 Chapter introduction

This purpose of this chapter is to address objective one: ‘To review the literature on social media and social media application in organisations in order to identify critical success factors’.

As this study considers social media as its domain, the first part of the chapter explores definitions of social media to address research question 1: ‘What is social media?’.

The second part of this chapter considers the benefits and purposes of social media usage, to focus on Research Question 2: ‘Why do individuals use social media?’. This section shows that selected studies have adopted the uses and gratifications theory as a lens to explore why individuals engage with social media. Many of the works identified similar reasons for social media usage.

The third part explores Research Question 3: ‘Are there different types of social media users?’, This reviews key typologies of online users, which often describe users’ motivations, with a summary of the selected typologies from Kozinets in 1999 to more recent research by Bulut and Dogan (2017).

The fourth part explores Research Question 4: ‘Are there differences in social media usage based on generational cohorts?’. This part presents an overview of generational frameworks and social media usage, as most studies in this area are centred around digital literacy which is located within digital competency.

The chapter concludes by outlining critical success factors of social media usage for individuals.

2.2 Defining social media

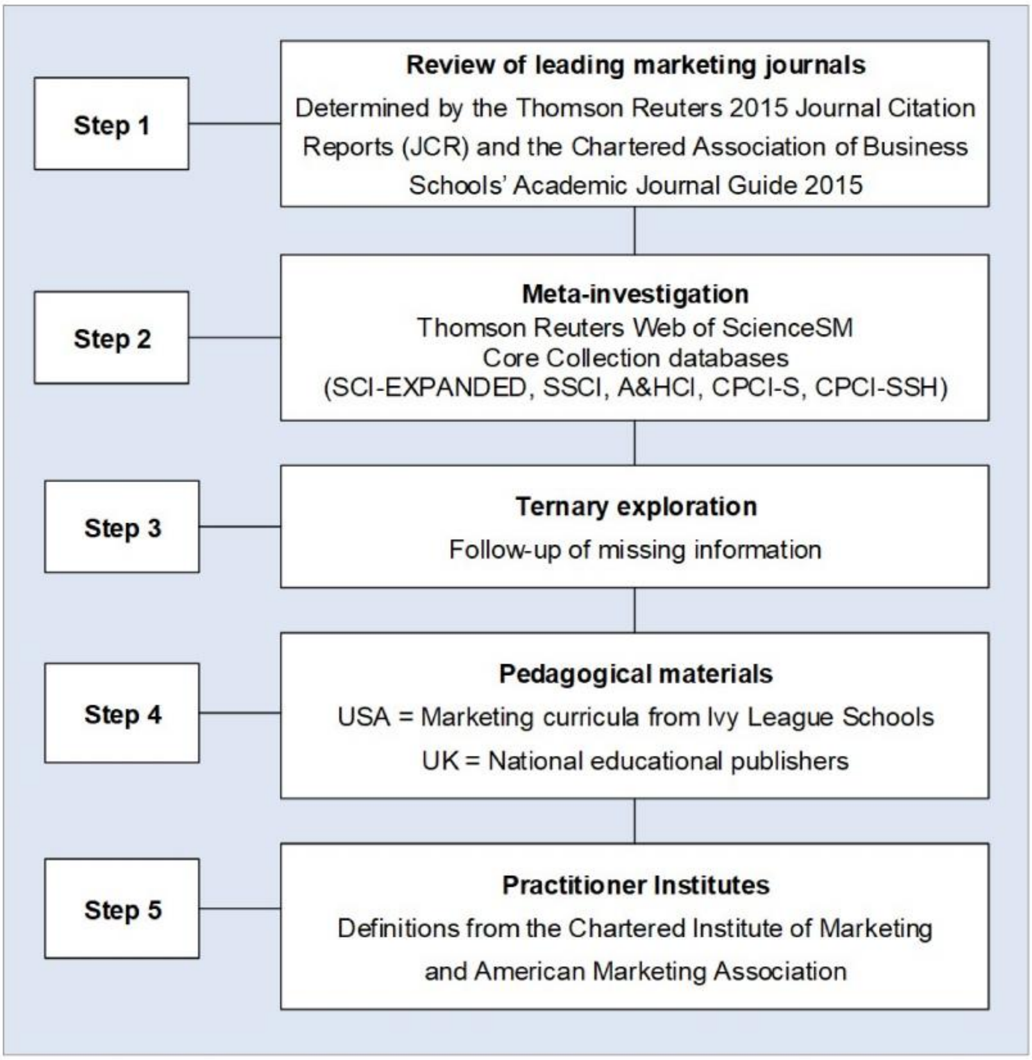
One phenomenon which has been observed is that there is no agreed definition of ‘social media’ (Kane, Labianca and Borgatti, 2014). As a consequence, some have circumvented the issue and assumed an implied or understood definition (Close, Dixit and Malhotra, 2005; Raman and Smith, 2014; Kaufman and Horton, 2015), relied on others’ definitions (see for example: Dahl, 2015, 2018), simply added the term ‘social media’ into an amorphous collection of other phrases (Kozinets *et al*., 2010), re-phrased existing definitions (see for example: Majchrzak *et al.*, 2013), or confounded social media, social media websites and social media networks (see for example: Kim, Jeong and Lee, 2010; Kane *et al.*, 2014).

However, by contrast, the earlier-used technical term Web 2.0, first coined by DiNucci (1999) ’interactive content universally accessible through a standard interface’ (p. 32), but largely accredited to O’Reilly (2005) has been debated, researched and defined by several scholars (see for example: Wilson *et al.*, 2011; Zamani and Brady, 2012). Yet, the terms ‘social media’ and ‘Web 2.0’ are seen as interchangeable, whilst there are clear distinctions as Web 2.0 is often described as focusing on technical tools (Tenopir, Volentine and King, 2013), while social media is usually attached to the community aspect of the internet (Constantinides and Fountain, 2008). This may be because Web 2.0 is situated within the domain of computer scientists where scientific communities require clear descriptions of terms for the avoidance of error.

Thus to answer the question ‘What is social media?’ empirical answers were sought, following a pragmatist research methodology (Fendt, Kaminska-Labbé and Sachs, 2008), which sought a comprehensive range of definitions, following Peirce’s ’pragmatic principle’ (Ormerod, 2006, p. 898), of a ‘practical bearing’

(Peirce, 1878, p. 293). Following guidance from other scholars, the criteria to identify definitions of social media involved a comprehensive search and analysis (Kapoor *et al.*, 2018), which involved five steps and is illustrated in Figure 2.1. The following section subsequently explicates each step employed to gather relevant definitions.

Figure 2.1 Search strategy to identify social media definitions



Step 1: Review of leading marketing journals

Based on advice from Webster and Watson (2002) a review of the leading marketing journals, as determined by the Thomson Reuters 2015 Journal Citation Reports (JCR) and the Chartered Association of Business Schools' Academic Journal Guide 2015, which is 'based upon peer review, editorial and expert judgments following the evaluation of many hundreds of publications, and is informed by statistical information relating to citation' (Wood and Peel, 2015).

The inclusion criteria for journals was 2015 JCR Rank 1, 2, 3, 4, 5 or CABS 4 star or 4* star, with a focus on marketing, these are the leading journals in marketing, as noted by Hackley (2009a). This review comprised a manual search through each of the journals by year and sought subject keywords and key phrases in article titles. Where the keywords "social media networks", "social media", "social networks", "social networking sites", "social network sites", "online social networks", "new media", "semantic web" (Metcalfe, 1999) and "Web 2.0" (DiNucci, 1999; O'Reilly, 2005), were identified within the article titles, the abstract was reviewed and if this indicated content on social media, the text was examined. The timescale explored was from the first available publication in 2004 to January 2018, where saturation (Suri, 2011), had been achieved and the data explored included seeking articles in the journals listed in Table 2.1, which shows the total number of articles available from January 2004 to January 2018.

Table 2.1 Number of articles in leading marketing journals reviewed (2004 to January 2018)

JOURNAL	NUMBER OF ARTICLES REVIEWED (N)
Journal of Consumer Research	112
Marketing Science	112
Journal of Marketing	110
Journal of Marketing Research	110
Journal of the Academy of Marketing Science	105

JOURNAL	NUMBER OF ARTICLES REVIEWED (N)
International Journal of Research in Marketing	91
Journal of Retailing	89
TOTAL	**729**

Step 2: Meta-investigation

Tadajewski (2018) suggested that journal ranking lists may fail to provide information about individual papers and it has been further recognised that the leading journals ‘represent a nexus of influence’ (Hackley, 2009a, p. 29) and could be perceived as hegemonic, therefore other journals were not ignored. Thus to locate published articles addressing social media definitions, the second stage was a meta-investigation based on the inclusion criteria of employing the same search strategy used in step one which focused on the article titles within journals.

A Boolean search[2] was performed via the EBSCOhost online reference system which provides ‘a variety of proprietary full text databases and popular databases from leading information providers’ (EBSCO, 2014). This was supported by a computerised bibliographical keyword search of extant literature via Thomson Reuters Web of Science^{SM} Core Collection databases (SCI-EXPANDED, SSCI, A&HCI, CPCI-S, *CPCI-SSH*), which necessitated drawing on relevant literature beyond the domain of marketing, to embrace interactive marketing and electronic commerce.

Another search was conducted within a leading business publication, the Harvard Business Review, seeking ‘social media’ in the title of all works from 2004 to September / October 2018 and this resulted in eleven articles; including editorial commentaries (Ignatius, 2010), to summaries (Wilson, 2010; Armano *et al.*, 2011), an editorial feature (Garland, 2016), and to a social media graph

[2] Boolean searches or logic strings (named after the English mathematician George Boole) are carried out using 'operators' which comprises terms such as AND, OR, NOT, subsequently narrowing the search results.

(Bizzi, 2018). There was a description of social media characteristics (Holt, 2016), and only one article (Dutta, 2010), quoted the Wikipedia definition (Anon, 2015). Thus the Harvard Business Review failed to offer any definitions of social media.

Step 3: Ternary exploration

A ternary exploration examined leading websites in the popular and practitioner domain, recognised by Forbes Magazine (Robehmed, 2016) in the *100 Best Websites For Entrepreneurs*; resulting in two definitions (Jantsch, 2008; Brogan, 2012). As academia has failed to establish a distinct and agreed definition, the popular and practitioner domain has created their own range of definitions.

As recommended by Kumar (2016), an additional line of enquiry was adopted; ‘interacting with peers in academia’ and discussions in associated and cognate disciplines were conducted at the UK Academy of Marketing conference (2014 and 2015), the American Association of Artificial Intelligence, Weblogs and Social Media (2015) and The INC - Tourism Hospitality & Events INternational Conference (2018).

Step 4: Pedagogical materials

A review of pedagogical materials on core digital marketing curricula from universities and schools in the USA and the UK was conducted. The universities in the USA were based on the curricula used in the eight Ivy League schools and all schools’ courses were explored online to identify marketing modules. The UK pedagogical materials were sourced by identifying the educational publishers and reviewing their works on digital marketing. It was observed that that many schools in the USA utilise journal articles, rather than textbooks within their reading lists, more than their UK counterparts.

Step 5: Practitioner institutes

Following further advice, an examination of the two longest-established practitioner institutes in the United Kingdom and the United States of America were sought. In 2017 both institutes (American Marketing Association, 2017; Chartered Institute of Marketing, 2017), added a glossary to their resources page, providing definitions of social media.

Subsequently other European professional institutes were contacted to ensure potential definitions were not missed. This included the Internet Marketing Association and the Marketing Institute Ireland who advised that they defer to the Wikipedia definition (Internet Marketing Association, 2018; Marketing Institute Ireland, 2018). For completeness, the following associations were contacted (in their own languages), but did not respond: The Institute of Direct and Digital Marketing (IDM), Marketing Society, European Marketing Academy, Association of Internet Researchers, Deutsche Marketing Verband (DMV), L'association française du marketing (afm). Thus this represented a comprehensive assessment to identify twenty definitions of social media which are listed in Appendix B.

To analyse the content QSR NVivo (QSR International Pty Ltd, 2018), was used and the definitions were imported as a corpus, which provided a word-list of 243 items. Content analysis based on frequency of specific words was conducted, which excluded the words 'social media' and used exact matches, as when stemmed words (technology, technologies, technological) were grouped, this erroneously associated communication and communities. The word *based* was excluded as a compound noun attached to 'web-based'.

When analysed using a word count illustrating the frequency of mentions, with an exact match search, as shown in Figure 2.2, this highlighted the top keywords as being content, which although ten counts were recorded, three were in a single definition. This was followed by: digital (6 counts) and subsequently the following words which recorded five counts: allow, communication, interaction, users, and web. There were four counts for: create, internet, people and way. There were three counts for: applications, consumer, forums, generated, online, organizations, platforms, produce, product, sites, technological, tools, two, user, and websites.

Figure 2.2 Word cloud showing word frequency in social media definitions with exact matches

Following the initial word frequency counts, further manual analysis was conducted by exporting the word frequency summary into Microsoft Excel. This enabled reduction of the word-list of 243 items into relevant stemmed word groups, such as singular and plural word forms (e.g. interaction, interactions) and present and past tenses (e.g. create, created). Following a pragmatist epistemology, words which did not practically contribute to the definitions were removed, this included: numbers (two, three), indefinite and definite articles (a, an, the), specific platform types (blogs, boards, Facebook, Instagram, LinkedIn, Pinterest, Reddit, Skype, Tumblr, Twitter, Youtube) and definitional descriptors (words, term). Additionally words mentioned once were not included. The list is within Appendix C, thus those mentioned at least five times, were found to be: users, internet, facilitate, content, interaction, communication, create, organisations, digital, position, way and channel.

Whilst several definitions incorporated reliance on the internet (web, website, websites, site, sites), a core feature of two of the larger social media networks is that they can operate without internet access, using the analogue telephone network if needed (Eltantawy and Wiest, 2011; Khamis and Vaughn, 2011; Chamlertwat and Bhattarakosol, 2012; Facebook, 2015; Twitter, 2015). Thus the word internet and related terms could be considered superfluous. Furthermore, as social media is part of the domain of marketing, it was noted that the word marketing was mentioned only twice. It was interesting to note that the definition provided by the Chartered Institute of Marketing failed to mention marketing and described social media as an 'overarching term that covers all types of technology that allows sharing' (Chartered Institute of Marketing, 2017, p. 70), and subsequently listed specific social media platforms. Thus, synthesising the top frequently mentioned terms contained in the social media definitions, within a sentence structure (Smith, 1989), provides the subject as actor (whether user or organisation, or for personal or business use), the verb facilitate, and objects including content and interactivity.

According to Creswell *et al.* (2011, p. 4), 'A pragmatic perspective draws on employing "what works," using diverse approaches, giving primacy to the importance of the research problem and question' and thus the review of social media definitions has considered multiple relevant sources which were important to identify apposite definitions, from which the content was analysed and distilled, resulting in the discovery of commonalities.

As research is a ‘progressive process’ (Dewey, 1938), within a pragmatist epistemology and ontology, there is a requirement to recognise the utility for organisations and thus an alternative working definition is proposed. This definition is based on this empirical research which achieved saturation (Saunders *et al.*, 2016), as no further definitions were found after the end of 2017.

To construct the definition, the individual social media platforms were excluded as these are subject to change, as was illustrated in Table 1.2. A further exclusion was references to websites and the internet, as this is not a technical requirement. Hence the proposed working definition addresses the actors at all levels, the facilitation that social media provides and the interaction. Furthermore, as social media is within the domain of marketing, this has been incorporated within the working definition. Additionally within a pragmatist ontology and epistemology, the term marketing has been extended to ‘marketing purposes’, which encompasses all aspects of social media, from user-generated content, to consumer-to-consumer influence, as well as all levels of communication between the different actors:

> Social media is the facilitation of interactive, connected, marketing purposes at organisational, peer-to-peer and personal levels.

This is a domain that requires further research and a strong foundation requires an agreed definition. For the purposes of this study, this working definition will be adopted.

2.3 Uses and gratifications theory of social media usage

To address Research Question 3: ‘Are there different types of social media users?’, a search was conducted within extant literature utilising the key-phrase ‘usage of social media’. This took place in academic journals published after

2005, available via EBSCO[3]. This identified the articles discussed in this section. These contained common traits as researchers such as Shao (2009); Muntinga, Moorman and Smit (2011); Whiting and Williams (2013) applied the concept of uses and gratifications to social media and described the model as a means to develop 'better scales and measurement instruments for social media marketers' (p. 362).

Whilst it is acknowledged that social media provides the function of belonging to a group or community (Kozinets, 1999; Watts, Dodds and Newman, 2002), beyond this, social media networks offer individuals a wider range of recognised benefits, which could be described within a uses and gratifications framework (Katz, Blumler and Gurevitch, 1973). Although this was founded in mass media and originally concerned with politics, it is a helpful framework to better understand motivations for social media usage.

2.3.1 Connecting with the brand

Research into motivations for brand-related social media use by Muntinga, Moorman and Smit (2011), also adopted uses and gratifications theory. These scholars recruited participants from the Netherlands who represented a wide range of ages and conducted unstructured, open-ended online interviews via instant messaging. Having been inspired by the commercial researchers at the American consultancy company Forrester (Li and Bernoff, 2008), they rephrased some of the commercial typologies to define motivations for social media usage and named their construct 'COBRA' (Muntinga, Moorman and Smit, 2011, p. 13), to represent 'Consumers' Online Brand-Related Activities' and focused on three purposes that spanned a continuum from passive to active participant. These comprised: (i) consuming, where the consumer views and listens only; (ii) contributing, where the consumer adds reviews and content to brand-related pages; and (iii) creating, where the consumer actively creates content.

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[3] EBSCO is the leading provider of research databases, e-journals, magazine subscriptions, e-books and discovery service to libraries

Subsequent research by Hamilton, Kaltcheva and Rohm (2016a) explored brand–consumer interactions. Whilst they used the prism of the uses and gratifications theory, a different approach to Muntinga, Moorman and Smit's earlier work (2011) was adopted; a mixed-methods study with 102 students who selected a brand of their choice and diarised interactions, such as 'accessing product information … for customer service' (p. 136). Their study involved two surveys that rated activities, before and after the two-month diary project, to gain distinct measurement scales, as well as diary coding. Thus, ten motivation categories were developed (p. 138): (i) promotions/incentives; (ii) timeliness; (iii) product information; (iv) engagement; (v) purchase; (vi) browsing; (vii) customer service; (viii) entertainment/fun; (ix) branded content; and (x) personalisation/exclusivity. Elements of these categories are explored in the next section.

2.3.2 Self-expression, social interaction, information, entertainment

Shao (2009) provided one of the earliest descriptions of social media usage and explored motivations for creating user-generated media through the lens of the uses and gratification theory. Similar to others in this area, Shao was influenced by earlier research into mass media by McQuail (1983), who identified four key factors in media usage: (i) information; (ii) personal identity; (iii) integration; and (iv) social interaction; and entertainment. However, Shao's research provided a triadic framework based on activities: (i) producing: for self-expression and for self-actualisation; (ii) participating: for social interaction and for community development; and (iii) consuming: for information and for entertainment. Whilst conducting this work, Shao remarked 'this paper is mainly theoretical due to a relative lack of empirical evidence' (p. 7), although it should be noted that the work was centred around a singular aspect of digital marketing; user-generated content. Yet, Wellman and Gulia (1999) presciently identified, almost two decades ago, not all users create content and indeed some users are lurkers - remaining silent, not contributing to the community, simply consuming content.

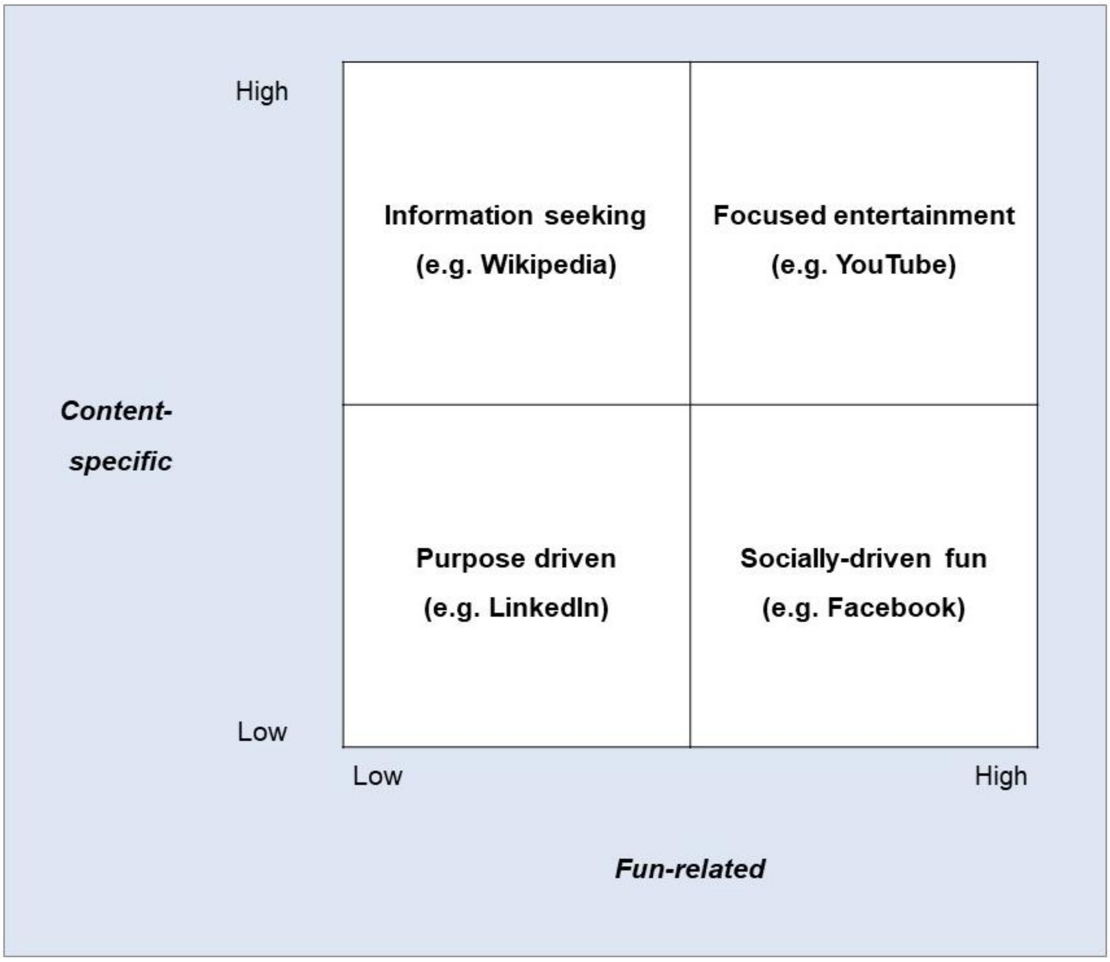
As empirical research became more readily available Whiting and Williams (2013) reviewed the extant literature and identified seven themes: (i) social interaction; (ii) information-seeking; (iii) passing time; (iv) entertainment; (v) relaxation; (vi) communicatory utility; and (vii) convenience utility. Consequently, they tested their research through an exploratory study of 25 in-depth interviews with people aged 18 to 56. This resulted in confirmation of the initial seven topics and the addition of a further three subject areas, bringing a total of ten uses and gratifications for using social media: (viii) expression of opinions; (ix) information sharing; and (x) surveillance/knowledge about others.

Whilst Shao (2009), Muntinga, Moorman and Smit (2011), and Whiting and Williams (2013), assembled the motivations into categories, recurring themes included: information; personal identity; integration and social interaction; entertainment; empowerment; and remuneration. From this, three overarching purposes and benefits of social media for individuals can be deduced, which illustrates the different types of social media users: (i) consuming; (ii) participating; and (iii) producing. However, what these researchers did not consider was the awareness, attitude or ability of those using social media. The next section will look further into these purposes and benefits of social media.

2.3.3 User purpose of social media – to consume

Social media consumption for entertainment and information-seeking has been identified in several works, for Luchman *et al*. (2014), who took a different approach by not framing their work around a theory, although they discussed uses and gratifications. Instead, they conducted a large-scale postal survey of young adults (16 to 24 years old) in the USA over a three-month period. Their aim was to develop 'a framework for young adult SM usage in terms of over-arching functions and between-user interaction' (p. 136), they gained 1,686 usable responses. The research identified entertainment and information seeking within a two-dimensional construct which was divided into four quadrants and is portrayed in Figure 2.3 with selected examples of the platforms they provided.

Figure 2.3 Two dimensions of social media: fun-related and content-specific



Source: Adapted from Luchman, Bergstrom and Krulikowski (2014).

Whilst this could be considered a parsimonious model and the results may not surprising, it reiterated that a critical factor in social media consumption for individuals is to be entertained and to find information. This model harked back to the earlier classification of social media tools by Kaplan and Haenlein (2010), who presented social media using recognised theories with social presence (Short, Williams and Christie, 1976), and media richness (Daft and Lengel, 1986), on the x-axis, and self-presentation (Goffman, 1959), and self-disclosure (Schau and Gilly, 2003), on the y-axis, as illustrated in Figure 2.4.

Figure 2.4 Classification of social media by social presence/media richness and self-presentation/self-disclosure

		Social presence / Media richness		
		Low	Medium	High
Self-presentation / Self-disclosure	High	**Blogs**	**Social networking sites (e.g. Facebook)**	**Virtual social worlds (e.g. Second Life)**
	Low	**Collaborative projects (e.g. Wikipedia)**	**Content communities (e.g. YouTube)**	**Virtual game worlds (e.g. World of warfare)**

Source: Kaplan and Haenlein (2010, p. 62).

This construct is helpful in understanding the uses and gratifications of social media for individual usage, although social presence may not always equal media richness. Thus deliberating the theories employed in this model, social presence, or the degree of reality assigned to the individual through computer-mediated communication, is still valid within online communication, although media richness may not always correspond. Social presence can represent immediacy and intimacy, with platforms such as WhatsApp providing both factors, although there may be less media richness if this represents the removal of message ambiguity (Daft and Lengel, 1986). Considering that media richness was originally formulated for application within an organisational context rather than personal usage of social media (Daft and Lengel, 1986), in the current environment this concept has evolved to incorporate a wider array of tools to ensure the receiver understands, engages and shares content with others (Araujo, Neijens and Vliegenhart, 2015). There may be a connection between entertainment and media richness - one example can be found in the work of Hofmann *et al.* (2013), who identified that when exploring social media content across local government posts, for selected cities in Germany, there was greater engagement for posts with greater media richness and containing multi-media features. This has been partly supported by additional research in a similar context (see Bonsón, Royo and Ratkai, 2015).

Self-presentation theory, extended to self-disclosure, is more often considered at a personal level. Luchman, Bergstrom and Krulikowski (2014) explored the notion of revealing personal information in their study but added this to the content-specific dimension where users shared professional details on LinkedIn for a specific purpose. Organisations may present a corporate or personal view in social media, yet there are mixed findings about which is more successful, based on factors including: the stage in the customer journey; relationship with the brand; and the type of goods offered (see for example: Gretry *et al.*, 2017; Barcelos, Dantas and Sénécal, 2018).

Whilst both Kaplan and Haenlein (2010), and Luchman, Bergstrom and Krulikowski (2014), were not intending to produce site-specific frameworks, there are parallels which are specific to the platforms, such as Facebook, that are identified as being high on the Luchman *et al.* (2014), fun-related scale and high in terms of self-presentation and medium for media richness, according to Kaplan and Haenlein (2010). As Kaplan and Haenlein noted (p. 61):

> There is no systematic way in which different Social Media applications can be categorized. Also, new sites appear in cyberspace every day, so it is important that any classification scheme takes into account applications which may be forthcoming.

Using extant theories and providing examples for illustration has resulted in Kaplan and Haenlein's classification retaining validity although the focus is on individuals' usage and experience of social media, rather than the functionality for organisations or personal gratification.

2.3.4 User purpose of social media – to participate

Social interaction, where individuals build networks and extend friendship groups as part of online communities, has been widely documented (boyd and Ellison, 2007; Dollinger, 2015). Part of this interaction is evidenced in the ability to seek and share content (Kietzmann *et al.*, 2012; Abrantes *et al.*, 2013).

Baird and Parasnis (2011), explored social media as a customer engagement channel having surveyed 1,000 consumers in the United States, Canada, the United Kingdom, France, Germany, India, China, Australia and Brazil, through the auspices of the IBM Institute for Business Value. In this research generational cohorts were a factor, as they noted this 'represented a distribution of ages among Generation Y, Generation X and Baby Boomers' (p. 31). Subsequently, they asked 350 business executives why they thought their customers engaged with them on social media.

The consumers' reasons for brand engagement via social media comprised twelve factors (Baird and Parasnis, 2011, p. 34), ordered here by high to low volume of percentage responses: (i) discount; (ii) purchase; (iii) reviews and product rankings; (iv) general information; (v) exclusive information; (vi) learn about new products; (vii) submit opinion on current products/services; (viii) customer service; (ix) event participation; (x) feel connected; (xi) submit ideas for new products/services; and (xii) be part of a community (Baird and Parasnis, 2011). Although they noted the generations, the findings did not address the impact of these different cohorts. However, there was a contrast between the consumers' reasons for brand engagement and the executives' observations, illustrating a clear perception gap, notably as the primary reasons cited by consumers for brand engagement were: (i) discounts; and (ii) purchases, yet these two motivations were listed as the final two items by the executives. It is interesting that the executives had not realised that customers might simply want to shop. However, this may indicate that further research is required into the area of perceptions within social media usage.

Other research has acknowledged online brand engagement as a motivator, where social media enables individuals to communicate directly with brands and participate in their online activity (Pletikosa-Cvijikj and Michahelles, 2013). Part of this brand engagement has generated a new industry revolving around customer service providing the chance of being heard, gaining better service from organisations and resolving complaints (Muñiz, Jr. and Schau, 2007; Dollinger, 2015; Istanbulluoglu, 2017).

2.3.5 User purpose of social media – to produce

Whether inside a community or engaging in a brand-managed forum, content can be created for many purposes such as expressing opinions or posting reviews. There is a continuum of content production, where at one extremity minimal amounts of content are produced, such as clicking on a star to provide a rating. At the opposing boundary the 'hybrid user-producer' (Bruns, 2006, p. 1) named *produsers* (*sic*) emerge and offer 'collaborative and continuous building and extending of existing content in pursuit of further improvement' (Bruns, 2006, p. 2).

Shao's study (2009), was related to user-generated content; unsurprisingly, production as a feature of 'self-expression, for self-actualization' (p. 15), was detected and comprised the ability to develop an online identity and to be found (Kietzmann *et al.*, 2011), and is a core aspect of self-presentation and self-disclosure. A more granular approach was taken by Whiting and Williams (2013), as they recognised benefits including passing-time and relaxation, which could be considered as repetitive, although, it should be noted that some respondents passed their time using social media when bored at work, rather than relaxing at home. Other elements they pinpointed were the communication and convenience factors.

In terms of uses and gratifications, none of the selected studies mentioned the potential of finding offers or buying products via social media.

2.3.6 Summary of consumers' uses of social media networks

A summary of the different purposes of social media usage, along with the theory adopted for the study, is shown in Table 2.2. This highlights that most researchers have identified the primary uses of social media by individuals as social interaction and entertainment. In many cases, this was followed by information and status sharing. Information included organisational research and was used by consumers for gathering product or service details and finding offers (Whiting and Williams, 2013; Luchman, Bergstrom and Krulikowski, 2014).

Several - but not all - researchers, identified communication as a usage of social media (Whiting and Williams, 2013; Luchman, Bergstrom and Krulikowski, 2014), which may seem curious as it is often cited as the main reason for social media consumption. Communication incorporated contact with brands, hence the sub-title of the article by Muntinga, Moorman and Smit

(2011), is ‘exploring motivations for brand-related social media use’ and their factors for users are related to brand engagement.

Other drivers of social media usage were identified by single researcher groups including: community development (forming online groups via conversations); relaxation / pass time (reduce stress / boredom); convenience utility (being useful); remuneration (economic or employment benefit); and surveillance (people watching). The remuneration factors could be seen as related to connecting to brands, seeking deals or finding offers.

In total, ten critical factors of individual social media usage were located in this research, within which the generations varied and are shown in Table 2.2.

Table 2.2 Summary of critical factors of individual social media usage with age ranges based on published literature

	YEAR	**2009**	**2011**	**2013**	**2014**	**2016**
	Authors	Shao	Muntinga *et al*.	Whiting and Williams	Luchman *et al*.	Krishen *et al*.
	Age of participants	Aged under 20 to over 50	Various ages	Aged 18 to 56	Aged 16 to 24	Baby boomers, generation X, millennials
	Characteristics of participants	No empirical data, theoretical study	20 individuals engaging with brands online	25 individuals using social media	1686 individuals using social media	570 individuals using social media
Critical factors of individual social media usage	**Social interaction**	✓	✓	✓		✓
	Entertainment	✓	✓	✓	✓	
	Information	✓	✓	✓		
	Personal identity / status	✓	✓			✓
	Communication			✓	✓	
	Community development	✓				
	Relaxation / pass time			✓		
	Convenience utility			✓		
	Remuneration		✓			
	Surveillance			✓		

The first objective sought to: 'Review the literature on social media and social media application in order to identify critical success factors'. This section has addressed the uses of social media by individuals, resulting in the identification of critical factors for use of social media by users which comprised: social interaction; entertainment; information; personal identity / status;

communication; community development; relaxation / pass time; convenience utility; remuneration; and surveillance.

What is less clear is whether there are overt differences in usage due to the age, awareness, attitude and ability of individuals to employ digital tools. This will therefore be explored in the research phase.

Having reflected on the critical factors within social media for consumers, the next section studied the typology of social media users, to identify if any critical factors had been omitted.

2.4 Typology of social media users

Another method of considering the critical factors within social media is to explore typologies, as ordered units of behavioural characteristics which may shine a light on other purposes or make distinctions across generational cohorts which could be of use to organisations (Barnes *et al.*, 2007), when researching their customer segments.

One of the earliest recognitions of user types in online marketing, based on group involvement, came from Kozinets (1999), who explored group ties and consumption resulting in four typologies; this was reflected in the work on user clusters proposed by Mathwick (2002), who researched internet users within a behavioural setting. Similar to Kozinets, Mathwick identified four groups: Transactional Community Members; Socializers; Lurkers; and Personal Connectors (Mathwick, 2002, p. 47) .

The work by Kozinets (1999), and Mathwick (2002), was pioneering although both studies created definitive clusters with no opportunity for users to adopt different behaviours across a range of platforms - a singular and universal approach to the whole of social media. This may be because the studies were conducted at a time when the large social media networks (e.g. Twitter, Facebook and LinkedIn) did not exist and before the notion of adapting behaviour based on purpose or platform emerged. Framing users within these categories indicated that not all online behaviour was the same and provided possibilities for organisations to more carefully consider their online content, as well as the consumers of the content.

An alternative and often-quoted hierarchy of user types is that created by practitioners Li and Bernoff (2008). Whilst working at the commercial organisation Forrester Research, Li and Bernoff were likely motivated by commercial requirements and classified social network user types based on their participation within the community. This initially comprised six user typologies based on evidence gathered from their consumer surveys and named contribution categories, based on their involvement with the community, from ‘creators’ and ‘critics’ to ‘spectators’ to ‘inactives’. They later added a seventh type called ‘conversationalists’, who were very active social media users (Li and Bernoff, 2011, p. 43) and commented or updated but did not create original blog content.

One further and significant amendment to the original model was the recognition of mobility with users traversing from one group into another. However there was one static group - ‘inactives’ - who they viewed as remaining in the background, regardless of the platform. Inactives was possibly a less emotive term than the earlier proposed ‘lurkers’ (Mathwick, 2002). The concept of users adopting different roles had been identified earlier and Muntinga *et al*. (2011, p. 15) suggested that ‘user typologies are limited in the sense that people often engage in multiple roles’. This was the missing element in the earlier work by Kozinets (1999) and Mathwick (2002). The weakness of the Forrester Research framework is the wide range of user types which could be challenging to manage within an organisational setting.

Notwithstanding the issues that many typologies exist, there was no unifying classification of online and / or social media users. To address this, the most comprehensive development of user typologies was that created by Brandtzæg

(2010), who conducted a meta-analysis of twenty-two earlier studies containing user types, to define a ‘unified media-user typology’. He analysed typologies from 2000 to 2009 and considered previously named classifications to amalgamate the categories into eight typologies, within four groups comprising: frequency of use; variety of use; typical activity; and typical media platform (Brandtzæg, 2010). This marked a change from prioritising group involvement and contribution, to individual platform usage.

Other work into typologies included research by Kilian, Hennigs and Langner (2012), who analysed the social media behaviour of 813 Millennials. They classified three clusters, again based on usage. Similarly, Lorenzo-Romero, Alarcon-del-Amo and Constantinides (2012), proposed a classification based on usage frequency and was more manageable, with greater utility. Subsequently Alarcon-Del-Amo, Gomez-Borja and Lorenzo-Romero (2015) developed these typologies and whilst the original three types were retained, a fourth type was added; (iv) novel user, described as a frequent user with limited connections (p. 10).

The final set of typologies included in this section are those developed by Bulut and Dogan (2017), who followed the same method, classified by usage, with a further distinction of including business-oriented users.

Table 2.3 summarises the individual usage factors within selected examples of typologies of online users, which identify the user behaviours within online groups as: (i) group involvement; (ii) relationship orientation; (iii) contribution / content; (iv) usage frequency; (v) usage variety; and (vi) behaviour.

Table 2.3 Individual usage factors within selected examples of typologies of online users

Authors (year)	Typologies	Group involvement	Relationship orientation	Contribution / content	Usage frequency	Usage variety	Behaviour
Kozinets (1999)	1. Tourists (lack ties to the group and superficial interest in consumption activity) 2. Minglers (maintain strong ties to the group but routine interest in consumption) 3. Devotees (weak ties to the group but strong interest in consumption) 4. Insiders (strong ties to the group and strong interest in consumption)	✓	✓	✓			✓
Mathwick (2002)	1. Transactional Community Members (active and willing to provide feedback) 2. Socializers (more communal than exchange oriented, active joiners) 3. Lurkers (stays on the side-lines, does not connect) 4. Personal Connectors (participate in special interest communities and use the internet for friends, family and work)	✓	✓	✓			✓

Authors (year)	Typologies	Group involvement	Relationship orientation	Contribution / content	Usage frequency	Usage variety	Behaviour
Brandtzæg (2010)	1. Non-users (similar to inactives; do not use) 2. Sporadics (infrequent users) 3. Debaters (participate in some discussions, acquire information) 4. Entertainment users (use social media for entertainment, gaming, watching videos and shopping) 5. Socializers (spontaneous users who like to stay in touch) 6. Lurkers (using social media to pass the time) 7. Instrumental users (purposeful users with clear objectives such as information seeking, comparing offers) 8. Advanced users (high use and variety of all social media)			✓	✓	✓	✓
Li and Bernoff (2008, 2011)	1. Creators (active participants, busy creating content) 2. Critics (respond to rather than initiate updates) 3. Collectors (gather information) 4. Joiners (join but do not participate) 5. Spectators (watch but do not comment) 6. Inactive (absent or present but with no activity) 7. Conversationalists (initiate and facilitate communication)			✓	✓	✓	✓

Authors (year)	Typologies	Group involvement	Relationship orientation	Contribution / content	Usage frequency	Usage variety	Behaviour
Kilian *et al*. (2012)	1. The Restrained Millennials (least active users) 2. The Entertainment-Seeking Millennials (passive use of social media) 3. The Highly Connected Millennials (active users)			✓	✓	✓	✓
Lorenzo-Romero *et al*. (2012)	1. Introvert user (least active, few online connections) 2. Versatile user (frequent user) 3. Expert communicator user (most active)			✓	✓	✓	✓
Alarcon-Del-Amo *et al*. (2015)	1. Introvert user (least active, few online connections) 2. Novel user (frequent user, limited connections) 3. Versatile user (frequent user, many connections) 4. Expert communicator user (most active)			✓	✓	✓	✓
Bulut and Dogan (2017)	1. Advanced users 2. Business-oriented users 3. Communication seekers 4. Dawdlers			✓	✓	✓	✓

It is notable that the earlier works focused on group involvement, yet later researchers considered usage frequency and variety. This may be due to technological developments with the ability to create more vivid and interactive content, such as images or videos. However, all typologies represented behaviours within groups. This provides insights into different user behaviours of individuals which may be considered as possible critical success factors for organisations as to the application of social media, for example, how content is shared and with whom.

As Kozinets noted when creating his original typologies (1999, p. 253) ‘many of these groupings are implicitly and explicitly structured around consumption and marketing interests’, hence why the most common measures are the activity type and usage frequency, rather than age, awareness, attitude and ability of individuals to appropriately use digital tools, as has been discussed in this section. This raises a question as to whether organisations consider customer segmentation, such as these typologies when managing social media which will be investigated during the research phase.

The next section will consider generational frameworks.

2.5 Generational frameworks and social media usage

2.5.1 Generations in context

Generational frameworks are useful constructs that provide an additional layer in which to further consider usage and to situate research. The frame of generational cohorts has been adopted by several scholars (see for example: Baird and Parasnis, 2011; Krishen *et al.*, 2016).

Sociologists Strauss and Howe (1991) defined generations as ‘a cohort group whose length approximates the span of a phase of life and whose boundaries are fixed by peer personality’ (p.60) and the generations are labelled within social cartography where boundaries are based on seminal events or situations.

There is a specific classification for those born before and after quotidian digital access and adoption, with its locus on the same demographic - age. This additional classification is described as ‘digital natives’ and acknowledged as a recognised grouping and the counter-point to digital natives are ‘digital immigrants’. Whilst the terminology ‘native’ and ‘immigrant’ could be seen as divisive and equally reductionist in its approach, these taxonomies have been adopted into common parlance and employed amongst market segments from advertising to banking, librarians to occupational therapy, social science to education (see for example; Davies 2009; Schaffhauser 2014; Blowers 2010), to comprehend inequality in digital knowledge, communication and understanding.

Table 2.4 shows the generations classified by year of birth and sources. This additionally demonstrates that those prior to Generation X are clearly defined, whereas there is disagreement regarding the specific dates and varying terms for those born after Generation X whilst the classifications digital natives and digital immigrants are delineated within a distinct chronological phase.

Table 2.4 Generations classified by year of birth and sources

TERM	BIRTH YEARS	SOURCES
Baby Boomers	Born mid-1946 to mid-1964	Porter (1951), Hogan *et al*. (2008)
Generation X	Mid-1960s to the late 1970s / early 1980s	Coupland (1991), Hamblett and Deverson (1964)
Digital Immigrants	Born before 1980	Prensky (2001)
Digital Natives	Born after 1980	Prensky (2001), Palfrey and Gasser (2008)
Net Generation	Born between 1982 and 1991	Tapscott (1998)

TERM	BIRTH YEARS	SOURCES
Millennials	Born in or after 1982	Howe and Strauss (2000)
Google Generation	Born after 1993	Rowlands *et al*. (2008)
Generation Y	Born between 1981 and 1999	Bolton *et al.* (2013)
Generation C	Born after 1990	Dye (2007), Friedrich *et al*. (2010)

Whilst it is useful to classify the generational cohorts, many were initially created in popular publications - Porter (1951), was writing in the New York Post while Hamblett and Deverson (1964), Coupland (1991), Tapscott (1998) and Howe and Strauss (2000) authored best-selling books. Others gained credibility by virtue of their workplace, such as Dye (2007), a journalist with Reuters and the *Financial Times* and Friedrich *et al.* (2010), who worked at PriceWaterhouseCoopers.

However, Hogan, Perez and Bell (2008) were government social scientists, and the others writing about generational cohorts were academic researchers (Prensky, 2001; Palfrey and Gasser, 2008; Rowlands *et al.*, 2008; Bolton *et al.*, 2013). Therefore, the notion of generational cohorts has a mixed pedigree. However, as Bolton *et al.* (2013, p. 246) commented ‘we believe that it is useful to explore stable differences in values, preferences and behaviors across generational cohorts (or other market segments), but we caution against overgeneralization.’

Being wary of over-generalisation, the next section will explore these generational cohorts and explain the rationale behind them as well as some criticisms of the terms.

The original concept of digital natives is often accredited to Negroponte (1996), in his work ‘Being Digital’. He discussed the notion of a ‘digital life’ (p.163) and described how in 1976, the forerunner of a multimedia simulation tool had allowed an army group to ‘perform like natives’ (p.64). In that same year, the words native and immigrant were used, within the context of the internet by Barlow (1996), an American poet and essayist, who created ‘a declaration of the independence of cyberspace’, he stated that ‘you are terrified of your own children, since they are natives in a world where you will always be immigrants’ (p. 3).

The term ‘digital native’ was not established until Prensky (2001) assigned the phrase in preference to ‘net-gen’ or ‘digital gen’. Prensky’s research into education highlighted communication and comprehension issues between students and educators born in different times as the world moved online ‘Our students today are all “native speakers” of the digital language of computers, video games and the Internet’ (p.1). Prensky further asserted that this was due to adapted brain structures and identified six preferences within this group: (i) fast receipt of information; (ii) multi-tasking ability; (iii) graphics rather than text; (iv) random access to information; (v) function best when networked; and (vi) instant gratification and rewards.

Prensky’s focus was education and he declared that with the new generation, a new form of pedagogy was required. He continued to argue the case of the different generations (Prensky, 2005) and used metaphors from learning another language and suggested that digital immigrants had an accent from the past generation:

> We have adopted many aspects of the technology, but just like those who learn another language later in life, we retain an “accent” because we still have one foot in the past. We will read a manual, for example, to understand a program before we think to let the program teach itself. Our

> accent from the predigital world often makes it difficult for us to effectively communicate with our students (p. 8).

Prensky's metaphor for the different digital generations gained traction and subsequently Palfrey and Gasser (2008), refined and affixed a specific date to the 'digital native' as 'a person born into the digital age (after 1980) who has access to networked digital technologies and strong computer skills and knowledge' (p.345). They confirmed Prensky's preferences, which they named 'common practices'. They termed preferences (i) fast receipt and (iv) random access of information as 'their pattern of using the technologies to access and use information and create new knowledge and art forms' (p.4). They discussed (ii) multi-tasking and (v) networking '[relating] to one another in ways mediated by digital technologies' (p.4) and added the phrase 'constantly connected' (p. 5). They extended the description stating that digital natives are 'tremendously creative' (p.6) which they evidenced via the development of second identities in virtual worlds.

Prensky (2005), suggested 'digital immigrants' as a dichotomous distinction to digital natives for those:

> Not born into the digital world but [who] have, at some later point in our lives, become fascinated by and adopted many or most aspects of the new technology are, and always will be, compared with them, Digital Immigrants (p.1, p.3).

Palfrey and Gasser (2008), adopted the term 'digital immigrants' for those 'born prior to the advent of the digital age' (p. 346). However, they extended the concept and introduced a liminal state – the 'digital settler':

> Some older people were there at the start and these "Digital Settlers" – though not native to the digital environment, because they grew up in an analog-only world – have helped to shape its contours (pp. 3-4).

They qualified the online and offline behaviour of digital settlers:

> These older people are online too and often quite sophisticated in their use of technology but continue to rely on traditional, analog forms of interaction (p. 4).

Hoffmann *et al*. (2014), proposed an alternative threshold state - 'naturalized digitals' - for those traversing immigrant and native status, basing their classification on 'age, web experience, and education' (p.138). Naturalized digitals were further described by Hoffmann *et al*. (2014, p. 155), as:

> Former digital immigrants who, because of their open attitude toward new media and presumably also for professional reasons, were quick to adopt new media and have become as avid and creative in their Internet use as those socialized in the new media environment.

Digital immigrants and digital natives have therefore been accepted by several scholars, although it may be the presence of qualifications as a key factor in the organisational use of social media, rather than age, that should be further explored.

As a counter-point, the next section considers criticisms of these terms where generational categories have not been embraced by scholars.

2.5.2 Critics and issues of nomenclature

Over time, several researchers have asserted that digital natives are not connected to the frame of generations; for example, VanSlyke (2003), countered Prensky's argument and stated new pedagogy was not required. He said that such things depended on the individual student and on 'effective teachers' (p. 4), although he partly contradicted himself as he claimed that the analogy was useful to 'help us understand the differences between those who are comfortable with technology and those who are not' (p. 1). For Prensky (2001), the difference between digital natives and digital immigrants was that the immigrants used the technology and learned to adapt to the new environment, rather than being born there.

Although the concepts of digital natives and digital immigrants have been widely adopted, they have been criticised as the examples in Table 2.5 demonstrate.

Table 2.5 Examples of criticisms of the terminology 'digital natives'

SOURCES	RESEARCH METHODOLOGY	SUMMARY OF CRITICISM	DOMAIN / PUBLICATION
Bennett, Maton and Kervin (2008)	Literature review in fields of education and sociology.	Young people's relationships with technology is much more complex and while technology is embedded in their lives, young people's use and skills are not uniform.	Education / British Journal of Educational Technology
Helsper and Eynon (2009)	Analysed extant third-party dataset of the British population (Oxford Internet Survey) of 2,350 face-to-face respondents (of which 1,578 were Internet users) aged 14 years and older, on internet usage.	Seen as not helpful to define digital natives and immigrants as two distinct, dichotomous generations, as there are many similarities as well as differences.	Education / British Educational Research Journal
White and Le Cornu (2011)	Essay and opinion.	Combination of diverse elements; metaphor of language, age.	Internet / First Monday

SOURCES	RESEARCH METHODOLOGY	SUMMARY OF CRITICISM	DOMAIN / PUBLICATION
Kilian, Hennigs and Langner (2012)	Study of usage of blogs, social networks (e.g. Facebook), knowledge communities (e.g. Wikipedia), and file sharing communities (e.g. YouTube), within 813 male and female respondents aged 30 years and younger, from internet forums and mailing lists related to games, online media, schools, and universities.	The terms are too broad and lack precision.	Marketing / Journal of Consumer Marketing
boyd (2014)	Longitudinal qualitative study of teens in the USA, plus 166 formal, semi- structured interviews with teens during 2007–2010.	The rhetoric is unhelpful and politically charged.	Social networks / Book
Akçayir, Dündar and Akçayir (2016)	Convenience sample of 560 university students, 278 from Turkey and 282 from Kyrgyzstan, using a survey.	Digital ability is about investing time and effort to learn the technologies.	Computers in Human Behavior

However, none of the researchers provided clear explanations for potential differences in terms of the use of digital technology. Furthermore, these scholars failed to provide empirical evidence to wholeheartedly refute Prensky's claims.

One of the weaker arguments was from Bennett, Maton and Kervin (2008), who refuted Prensky's claims and assembled several studies in their defence. However this work solely focused around students. They drew no specific conclusions and considered that within the research to date, the disparity may not be due to generation, but to 'socio-economic status, cultural/ethnic background, gender and discipline specialisation' (p. 6). They suggested that more research was needed and a subsequent research paper from two of these authors (Bennett and Maton, 2010), again called for more research, which they failed to provide. They continued to reject Prensky's findings without empirical evidence for their claims. Nor did they comment on older digital users in either paper.

As a re-evaluation, White and Le Cornu (2011), proposed alternative typologies for the criticised terms - digital native and digital immigrants (Prensky, 2001). Their simplistic replacement encompassed another binary model - visitor and resident - which was based on a metaphorical analysis of Prensky's original work. However, this was based on non-empirical research and still provided a parsimonious definition that was centred on the use of metaphor.

Helsper and Eynon (2009), found it unhelpful to focus on generation as a defining characteristic and explored age, experience and breadth of internet use, within a UK sample data set. Whilst their research demonstrated that respondents of all ages in the sample utilised the internet, they did not explore whether all generations 'performed like natives'. There are limitations with their work as the age ranges used did not fully correspond to the 'after 1980' classification of digital natives which they separately defined as 'as someone who comes from a media rich household, who uses the Internet as a first port of call for information, multi-tasks using ICTs and uses the Internet to carry out a range of activities particularly those with a focus on learning' (p. 14).

Additionally, there were contradictions throughout the work as breadth and self-efficacy of ICT use were linked directly to age, which partly agreed with Prensky's earlier argument to such an extent that they commented that 'in some respects these findings do support the arguments put forward by Prensky and others' (p. 14). Helsper and Eynon (2009) argued against the concept by decrying the paucity of academic research, evidenced by Web of Science™ by only providing two citations for the 'digital native' search term, in March 2009, yet a search in June 2018 rendered 183 results[4] and a further search in January 2019 provided 213 results[5], indicating that the debate continues.

Akçayir *et al*. (2016), surveyed university students in Turkey and Kyrgyzstan and explored variables such as the role of gender, although no findings in this area were proven. They declared that university students were more likely to be digital natives based on their progression through their university journey. However, they found that Kyrgyz students were more likely than Turkish students to adopt digital native behaviour. Whilst they dispelled the concept of digital natives based on birth year, what is not known is whether the differences are based on access to technology, speed of internet or economic situation. Akçayir *et al*. (2016), acknowledged that further research including socioeconomic status or geographical location, is still required to confirm the findings. Selwyn (2009), also postulated whether access to technology is based on social-economic groups, echoing considerations from boyd (2014), who found the terminology 'dangerous' as it grouped entire populations into a single space (p. 197). She submitted that 'teens social status and position alone do not determine how fluent or informed they are vis- à- vis technology' (p.198), although her work was limited to teenagers.

There are many arguments against the notion of digital natives and digital immigrants. However, there is little empirical evidence to unequivocally refute Prensky's original claims. As the number of citations in Web of Science™ has increased, the recognised concepts of digital native and digital immigrant provide useful categories to explore whether in-company competence is based on age, awareness or the qualifications of individuals to use digital tools appropriately.

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[4] Search performed 20 June 2018 using the term "digital native"
[5] Search performed 20 January 2019 using the term "digital native"

2.5.3 Empirical research – motivation and social media

To establish a link between motivational needs for social media networking and satisfaction within generations, Krishen *et al*. (2016), gathered 570 observations collected through snowball sampling, using self-determination theory as their lens (Ryan and Deci, 2000). Their study considered the three core constructs: (i) competence (sense of being effective); (ii) relatedness (sense of security, belonging and being connected with others); and (iii) autonomy (sense of freedom and personal choice). One notable difference with this study, was that they located the research around three specific generations: Baby Boomers (1946–1964); Generation X (1965–1983); and Millennials (1984–2002). They wished to explore potential generation gaps connected to social media usage. Key findings showed that Baby Boomers and Generation X sought competence. Perhaps being older, they were keen to demonstrate their knowledge and expertise, although this is not clear. Unsurprisingly, relatedness was important to all generations - this is a key element in belonging to a group. The final construct of autonomy, or the ability to say what they wanted, was important to Generation X. Due to the nature of this study, there is no data on the rationale behind these arguments and whilst they identified some differences in usage, based on self-determination, there was no mention as to whether this was due to awareness or qualifications or the ability of the individuals to use digital tools.

Whilst the researchers in this section considered the usage of social media, none referred to the individual competences of the users and whether this had an impact of the usage. Only Krishen *et al.* (2016), stratified the ages of the participants into generational cohorts, although other researchers could have centred their research around the same generations (see for example Whiting and Williams, 2013; Shao, 2009).

These researchers specified the participants' ages which traversed three generations. Luchman, Bergstrom and Krulikowski (2014) considered a narrow age span: 'young Americans' (p. 142) and Muntinga, Moorman and Smit (2011) specified 'various ages'. The issue is that the lack of clarity regarding respondents' ages blurs the generations and fails to provide a clear application for organisations as to where to focus their social media application.

2.6 Digital literacy

Earlier in this chapter the concepts of digital natives and digital immigrants, as user typologies based on year of birth were discussed, where digital natives were perceived as having greater digital literacy, as defined by Prensky (2006), or more competence with technology, partly due to the time when they were born (Ng, 2012).

The concept of digital literacy is often related to education and learning. An early definition centred around the skills required and suggested that 'digital literacy is the ability to understand and use information in multiple formats from a wide range of sources when it is presented via computers' (Gilster, 1998, p. 6). However, Lankshear and Knobel (2006) refuted the 'unitary' notion of digital literacy as a 'finite competency or skill' and suggested that 'digital literacy' should be thought of as (p. 17): 'how people 'identify' themselves'. The concept was adopted within the European Union to such an extent that a working party formally defined digital literacy (Martin, 2006, p. 3):

> Digital Literacy is the awareness, attitude and ability of individuals to use digital tools and facilities to identify, access, manage, integrate, evaluate, analyse and synthesize digital resources, construct new knowledge, create media expressions, and communicate with others, in the context of specific life situations, in order to enable constructive social action; and to reflect upon this process.

Awareness, attitude and ability were placed at the core and whilst the definition was wide-ranging in terms of the skills listed, it was not age-related. However, over time the notion of awareness was replaced, possibly as technology became widespread and it became less of an issue, although access became a factor. Hague and Payton (2010, p. 2), refined the construct:

> To have access to a broad range of practices and cultural resources that you are able to apply to digital tools. It is the ability to make and share meaning in different modes and formats; to create, collaborate and communicate effectively and to understand how and when digital technologies can best be used to support these processes.

The levels of skill described resemble a learning taxonomy. Education is a leitmotiv within digital literacy literature and several authors (see for example: Goodfellow 2011; Lankshear and Knobel 2003; Martin 2006) have described issues with students' learning methods, which resonates with Prensky's original notion concerning the knowledge and skills difference based on ages between students and teachers. Another study concerning those working in education was conducted by Ng (2012), who investigated the digital nativeness and digital literacy of 51 undergraduate pre-service teachers in Australia. She demonstrated the participants' familiarity with web technology platforms, although not all used various technologies, nor did they actively engage with Web 2.0 tools to create artefacts. It was suggested that this may have been due to a lack of purpose to do so. She concluded that digital natives gained greater opportunities to 'engage with technologies' (p. 1078), although this study was based on a cohort with access to many tools, technologies and platforms.

Eshet-Alkalai (2004), created and subsequently revised (2012), a six-part model for digital literacy, which centred mainly around skills, although the fifth part 'socio-emotional digital skills' incorporated collaboration: (i) photo-visual digital skills; (ii) reproduction digital skills; (iii) branching digital skills; (iv) information digital skills; (v) socio-emotional digital skills; and (vi) real-time digital skills. This moves the basic skill set into a more sophisticated arena of proficient application and creation.

A critical factor in Eshet-Alkalai's later work (Eshet, 2012) was the observation that 'having digital literacy requires more than just the ability to use software or to operate a digital device; it includes a large variety of complex skills such as cognitive, motoric, sociological and emotional skills that users need to master in order to use digital environments effectively' (Eshet, 2012, p. 1). However, the results established that there were different abilities based on generational cohorts: younger participants managed photo-visual and branching digital skills better; and older participants excelled with reproduction and information digital skills. Whilst it is notable that there were differences between the generations, there is no explanation as to why.

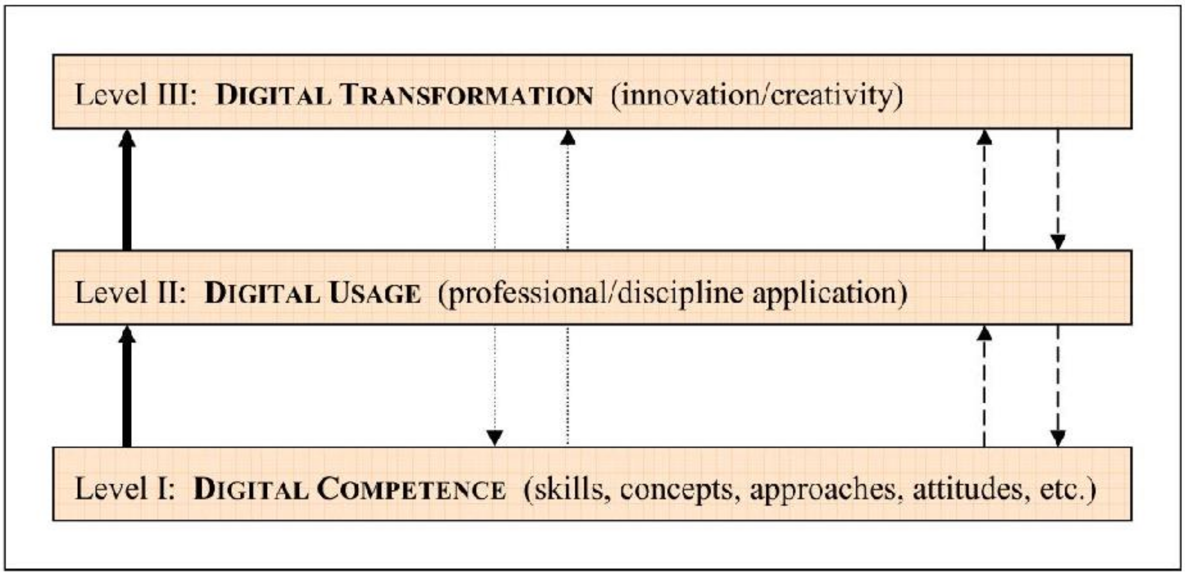
2.5.4 Digital literacy, digital competence and digital transformation

This study does not seek to fully investigate all aspects of digital literacy but to provide the context to better understand the critical factors impacting social media application within organisations.

Digital literacy is a major topic that has been led by governments, in particular the European Union which has conducted significant research into digital literacy and informs much of this section.

To better understand the construct Martin and Grudziecki (2006) proposed a framework of levels of digital literacy. As shown in Figure 2.5, this is a hierarchical model that commenced with skills and attitudes, followed by application and creation, which is not dissimilar to a typical learning taxonomy which resonated with the work by Eshet-Alkalai (2004, 2012).

Figure 2.5 Levels of Digital Literacy



Source: Martin and Grudziecki (2006, p. 255).

Digital competence

The first layer of digital literacy begins with digital competence; the approach, skills and attitude of users. Unsurprisingly governments are interested in 'digital competence', to such an extent that it has been recognised as one of the eight key competences for Lifelong Learning by the European Union (Ferrari, 2012). This is seen to provide social, health, economic, civic, cultural and societal benefits (Ala-Mutka, 2011). However, some researchers claimed that digital competence was not well-defined (Ilomäki *et al.*, 2016), thus a framework for Digital Competence (known by its acronym DigComp) was developed as part of a European Commission project (Martin, 2006; European Commission, 2013; Vuorikari *et al.*, 2016). The authors within these EU projects were qualified academics from across Europe, with wide experience of bringing information technology into classrooms. The framework for digital competencies identified five hierarchical dimensions (see Appendix D) and provided an image of the overall landscape, with the key competences but failed to provide a clear measurement tool. It is a complex multi-layered framework with a 21-item question set with sub-categories to self-assess ability, where individuals self-report using a five-point Likert scale[6]. Therefore the proficiency, skills and attitudes are based on individual perception, rather than the presence or absence of a formal marketing qualification. However, as an indicator of its importance, this framework has been adopted by the UK Government (ECORYS UK, 2016) and in part, considered characteristics noted by Prensky (2001) such as behavioural preferences and skills. However, within the dimensions of digital competence there are two habitual themes: (i) skills, which is contingent on the ability to perform specific tasks and activities with the technology (Gilster, 1998; Vuorikari *et al.*, 2016); and (ii) attitude or behaviour, which can be described as the willingness to carry out actions, regardless of motive (Lankshear and Knobel, 2006; Ng, 2012).

Other themes include context, which Lankshear and Knobel (2006), defined as the setting or place of access to the technology, whether at work or home. However, considering that this article was published one year before the iPhone was launched and the subsequent evolution of mobile technology, providing ubiquitous computing and access anywhere, this is now less of an issue. Furthermore, in this study, those being surveyed had access to technology due to the nature of their work with social media, thus this was excluded from the scope of the research. Another theme is knowledge, which Ng (2012), described as cognitive skills and which Vieru *et al.* (2015), styled as technology, centred on the ability to harness new hardware and software, although both could be considered as a duplication of skills.

Whilst aimed at educating citizens in different European Union states, digital competency is still a current research theme. The ability to use digital technologies has more recently moved into the classroom. Recognised as a core skill for teachers, digital competence is 'becoming a crucial element for the construction of useful pedagogical knowledge for practice and, consequently, improving students' learning' (Ramírez-Montoya, Mena and Rodríguez-Arroyo,

[6] (1) Not at all true of me (2) Not very true of me (3) Neither true nor untrue of me (4) Mostly true of me (5) Very true of me

2017, p. 357), yet there are still issues surrounding newly qualified teachers and their digital competency (Gudmundsdottir and Hatlevik, 2018).

Digital competence whether connected to a generational cohort or skill set or qualifications, has been identified as a critical issue for governments, which may cascade into organisational guidelines. A driving factor in the UK is the government's strategy 'digital by default' (Cabinet Office, 2012), requiring citizens and businesses living and operating in the UK to request and file all information online, where practical.

2.6 Chapter conclusions

This chapter has reviewed the construct of social media and in the absence of a universally-agreed and up-to-date definition, has provided a working operational alternative: 'social media is the facilitation of interactive, connected, marketing purposes at organisational, peer-to-peer and personal levels.'

Scientific approaches to the construction of definitions in the domain of marketing have been proposed by several scholars (Teas and Palan, 1997; MacInnis, 2011), yet according to MacKenzie (2003), many researchers fail to develop a 'clear, concise, conceptual definition of the focal construct' (p. 323). As Andreasen (1994) presciently noted when defining social marketing, disagreements in definitions are 'not uncommon for a new discipline' (p. 108). Thus, whilst a level of understanding exists, the lack of a clear vocabulary and a definition of social media, could limit marketing scholarship and is therefore an area that requires further research.

The contributions in this chapter include the finding of the overarching purposes and benefits of social media for individuals as: (i) consuming; (ii) participating; and (iii) producing. However, these researchers did not consider the awareness, attitude or ability of those using social media. The critical factors in the user purpose of social media which can better frame future research were also found. These factors were: social interaction; entertainment; information;

personal identity; communication; community development; relaxation; convenience; remuneration; and surveillance. These factors are further considered in the context of organisations in Chapter Three.

Whilst social media typologies for individuals were investigated and much of the extant research focused around specific age ranges, often explored via generational cohorts, in some cases with specific reference to the concepts of ‘digital natives’ and ‘digital immigrants’, one omission concerned the skills of the users. This demonstrated that the typologies focused on frequency and type of usage, rather than ability, although digital literacy is a key driver in government. Whilst it was helpful to make this assessment, the way in which typologies or segments within social media are applied within organisations remains unanswered. This will therefore be explored in the research phase.

This chapter has contributed to the body of knowledge surrounding generational cohorts. However, this does not resolve the issue as to whether digital natives or digital immigrants are more competent in their use of social media within organisations. The lack of empirical research in this area, coupled with the conflicting perspectives, requires further investigation. Whilst awareness may be less of an issue in a connected business environment, the notion of attitude requires additional consideration. Furthermore, the relationship between skills and application within organisations has not yet been fully explored and may be connected to generational cohorts. This is therefore an additional area for further investigation in the research phases.

Finally, the benefits of social media for business have been less explored than why consumers use social media (Nagle and Pope, 2013; Yadav *et al.*, 2013) and this is thus addressed in the next chapter.

Chapter Three: Social Media Models and Frameworks in Organisational Contexts

3.1 Chapter introduction

Social media are both changing and challenging the traditional business dynamic (Hanna, Rohm and Crittenden, 2011; Korschun and Du, 2013; Rapp *et al.*, 2013), whilst creating marketing contributions for organisations at many asynchronous levels and transforming organisational processes (Fulgoni and Lipsman, 2014; McTaggart and Benina, 2014). As a consequence, social media presents many marketing opportunities for organisations (Dollinger, 2015; Mills and Plangger, 2015).

As suggested in Chapter Two, social media could be considered as interactive, connected, marketing purposes at organisational, peer-to-peer and personal levels, as they facilitate the traditional axioms of business growth strategies, such as market penetration, market development and product development (Ansoff, 1957) which are illustrated in the extant literature:

- Creating awareness and generating sales with existing customers (Järvinen *et al.*, 2012; Qu *et al.*, 2013; Tsimonis and Dimitriadis, 2014);
- Influencing purchase decisions (Zhang, Craciun and Shin, 2010);
- Launching new products and product placement (Dobele, Steel and Cooper, 2015; Liu, Chou and Liao, 2015); and
- Brand promotion (Jansen *et al.*, 2009; Aladwani, 2015).

Equally, in a post-sales environment, social media offers organisations ongoing systems for:

- Customer relationship management (Hennig-Thurau *et al.*, 2010; Harrigan *et al.*, 2015; Verma, Sharma and Sheth, 2015; Kumar *et al.*, 2016);
- Customer services (Canhoto and Clark, 2013);

- Brand engagement (de Vries, Gensler and Leeflang, 2012; Hollebeek, Glynn and Brodie, 2014).

Thus the purpose of this chapter is to understand the usage and benefits of social media in an organisational setting. The chapter will firstly examine social media models that illustrate the benefits for organisations, to answer Research Question 5: ‘How can organisations use social media?’. Subsequently the chapter will extract the critical benefits of social media for organisations that will clarify why social media is of interest to organisations.

Having identified the benefits of social media for organisations, the lens of affordances will be applied to investigate Research Question 6: ‘What supplementary opportunities do social media offer organisations?’. From this Research Question 7 will be addressed: ‘What are the critical factors in social media usage for organisations?’. Having identified the critical factors, the next section will explore challenges with social media implementation for organisations to balance the overall perspective.

Subsequently guidelines for application of social media within organisations will be reviewed within the context of organisational maturity, to address Research Question 8: ‘Are there guidelines for the application of social media within organisations?’.

Finally, this chapter will conclude with the identification of elements to be investigated in the research phases, based on the application of affordances within organisations, extant guidelines and strategic frameworks for using social media.

3.2 Functionality and purpose of social media tools

To understand the models and frameworks for organisations, it is helpful to summarise the purpose of social media tools for organisations, as all offer different benefits or uses.

Chapter One provided a classification of social media networks (Interactive Advertising Bureau, 2009; Cann, Dimitriou and Hooley, 2011; Argyris and Monu, 2015). Within these classifications, Argyris and Monu (2015) considered the functionality of social media tools including: wikis, social networking sites, micro-blogging sites and video-sharing sites.

Kietzmann *et al.* (2012), provided a functionality framework which looked at the organisation's engagement with social media users through their construct named 'the honeycomb model' (p. 109). This offered a structural view of the user experience. Although this is a useful framework for assessing the community, it explicates the benefits of the different social media networks (identity, presence, relationships, reputation, groups, conversations, and sharing), rather than the application for organisations. Whilst there are recommendations for organisations, this study considered the consumer, rather than the organisation, as the central focus and thus does not identify critical benefits for organisations, but rather the functional gains from social media networks. By contrast Cann, Dimitriou and Hooley (2011), examined the purpose of social media networks, focusing on the generic ability the network provided, rather than the instrument's functionality. From this they identified: communication, collaboration and multimedia.

Vuori and Jussilao (2016), created an alternative framework which extended the purpose of social media for organisations. They proposed an alliterative 5C framework: communicating, collaborating, connecting, completing and combining, all of which could be viewed as uses or benefits, to enable organisations to understand the tools available. The difference with this classification is that the purpose of the social media category was defined, with examples of the tools and applications, as illustrated in Table 3.1.

Table 3.1 The 5C categories, purposes, tools and application examples

5C CATEGORIES	PURPOSE	TOOLS	APPLICATION EXAMPLES
Communicating: publishing and sharing content	Publishing, discussing, expressing oneself, showing opinion, sharing, influencing, storing	Blogs, media sharing systems, discussion forums, microblogging, instant messaging	Blogger, WordPress, Flickr, YouTube, Periscope, Reddit, Instagram, Twitter, Tumblr, SlideShare, Prezi
Collaborating: collective content creation	Creating content together, collaborating, produsage	Wikis, shared workspaces	Wikipedia, TWiki, GoogleDocs, MatchWare, Trello, FlowDock
Connecting: networking people	Socializing, networking, connecting, playing, entertaining	Social networks, communities, virtual worlds	Facebook, LinkedIn, SecondLife, World of Warcraft, Habbo Hotel, Pokémon GO
Completing: adding, describing and filtering	Adding metadata, describing content, subscribing updates, combining, rating	Tagging, social bookmarking, syndications, add-ons	Feedly, Flipboard, Pinterest, Foodgawker, StumbleUpon, Yelp
Combining: mixing and matching	Combining other tools and technologies according to situation and needs	Mash-ups, platforms	GoogleMaps, Hootsuite

Source: Vuori and Jussila (2016, p. 2).

Synthesising the frameworks discussed in this section leads to the key themes which were identified by more than one study: (i) communication; (ii) collaboration; and (iii) connectivity. Thus this section has identified organisational uses of social media including: communication, collaboration and connecting.

3.3 Critical benefits of social media for organisations

Several scholars have thus called social media game-changing as it has altered the rules of communication and has delivered critical benefits for organisations. However, customers have a voice and are able to control the conversation (Baird and Parasnis, 2011; Edwards, 2011; Corstjens and Umblijs, 2012), and 'consumers have become pivotal authors of brand stories' (Gensler *et al.*, 2013, p. 244), hence consumers have become more knowledgeable (Rolland and Parmentier, 2014). Therefore, the upsurge in social media has changed business in many ways and the eight benefits for organisations are shown in Table 3.2.

Table 3.2 Examples of eight critical benefits from social media for organisations

BENEFIT	BENEFITS FOR ORGANISATIONS	SOURCES
Market and product research	Access to themed communities, scattered or difficult-to-reach targets and access to knowledge via online communities.	Weinberg *et al.* (2013); Rolland and Parmentier (2014)
New product development	Generate new product ideas and gain insights by monitoring social media data.	Rathore, Ilavarasan and Dwivedi (2016)
Customer segmentation	Customers may self-segment by joining particular online communities of interest.	Canhoto, Clark and Fennemore (2013)
Brand building	Increase in brand awareness.	Wattanacharoensil and Schuckert (2015)
Brand management	Consumers managing the brand; creating artefacts and sharing stories.	Gensler *et al.*(2013)
Sales cycle	Consumer buying process is influenced by social media activities.	Saboo, Kumar and Ramani (2015)
Customer service	Potential for customer service and can support the development of long-term relationships and manage online issues.	Canhoto and Clark (2013)
Recordability	Record stakeholder communications and thereby demonstrate due diligence in formal reporting.	Argyris and Monu (2015)

As eight critical benefits from social media for organisations have been identified, the next stage is to consider the affordances or utility of social media within an organisational context.

3.4 The theory of affordances

This section will thus provide an introduction to affordances theory, which will be used as a lens to understand the application of social media within an organisational setting, in the empirical research. This section will further contextualise this theory within the marketing and social media literature and subsequently synthesise the core attributes of affordances. Frameworks for affordances will be illustrated and applied to the earlier identified critical benefits from social media for organisations. Subsequently, a decision tree model will be employed to assess whether a critical benefit can be classified as an affordance for social media. Consequently, the rationale behind the selection decisions will be explicated.

This section will conclude with a discussion concerning the limitations of affordances theory and identification of where further refinement and testing is required.

3.4.1 Introduction to affordances theory

Affordances, a neologism divined by Gibson (1979) in the domain of ecological psychology, yet often attributed to Norman (1988) following the success of his seminal work ‘the design of everyday things’, involve opportunities for action and positive affordances provide benefits. Gibson (1979, p. 127) defined affordances based on materiality and human agency:

> The *affordances* of the environment are what it *offers* the animal, what it *provides* or *furnishes*, either for good or ill. The verb to *afford* is found in the dictionary, but the noun affordance is not.

Gibson's background as an ecological psychologist took the notion of perception from Gestalt theory (Richards, 2009) which comprises three central elements: perception, cognition and learning. Gibson's perception concerns vision, although it has been more broadly described as 'the process by which we recognise what is represented by the information provided by our sense organs' (Martin, Buskist and Carlson, 2013, p. 186). Perception can be distinguished into different elements: including perceptions of form – how we see things as objects – within which Gestalt theory suggested that objects are recognised in their contextual setting and whilst boundaries may exist they do not preclude the visualisation of an object (Wagemans *et al.*, 2012). Gestalt theory appears in marketing literature, such as Hackley (2013), who similarly considered the setting, and the wider domain of consumer behaviour (Pachauri, 2002), as well as being recognised as a tenet of mixed-methods research (Tashakkori and Teddlie, 2003). Within the theory of affordances, the concept of Gestalt appeared to be more closely followed by Gaver (1991), who perceived objects as groups (he termed this nested) when adjacent or proximally located, as well as the notion of objects in a sequence, where one object continues the required action – such as pressing a door handle opens the door. Chemero (2003), recognised the mereology and explicated that affordances were features of 'whole situations' (p. 185).

Although Gibson (1979, 1986), explicated his concept of affordances and affirmed the focus on the relationship to the subject, whether animal or human, and their requirements, this was within a passive state where they were merely accessible for action, by the specific actor, when perceived as objects. McGrenere and Ho (2000), suggested a limitation of this concept was that actors had different needs and capabilities which Gibson failed to recognise and thus a staircase may be perceived by an able-bodied individual as a route to another part of a building, yet for an individual in a wheelchair, it could be perceived as a barrier. However Gibson's work was a *tabula rasa* and thus superficially positioned the notion of affordances and designated its characteristics, which were circumscribed by the notion that affordances were constant and lacked the possibility to change. This was expounded by the statement that affordances were ‘neither physical nor phenomenal’ (Gibson, 1986, p. 143), reiterating the construct that affordances were perceived by the observer who concentrated on artefacts which could be seen. Gibson’s work simultaneously confounded his concept with contradictions ‘an affordance is both physical and psychical, yet neither’ (Gibson, 1986, p. 129). The theory was subsequently adopted and popularised by Norman (1988), who adopted a more simplistic approach.

In a divergence from Gibson’s idea of direct visual perception, Norman extended the notion, moving beyond the unary psychological belief of solitary visual recognition and introduced tactile application, and asserted that affordances comprised the tangible properties of the item, to ascertain their usage. As a designer, Norman’s focus was the ‘psychology of materials’ (Norman, 1988, p. 9), and thus the materiality had agency, as he strived towards innate properties for objects, whereby the perception of the object would routinely denote its functionality. His construct further differed with Gibson’s concept as he suggested individuals had greater agency in understanding the affordance of an object – ‘what the user perceives can be done’ (Norman, 1992, p. 19). Likewise, his work was perhaps intended to be intuitive as it failed to fully describe *how* affordances could be used in design, simply that they *should* be used in design. However, in later work Norman (1998, 1999), attempted to provide clarification believing that his notion had been misinterpreted and suggested that real affordances existed, yet perceived affordances determined the usability within a design context. This was a pragmatic or solution-seeking approach which introduced the application of affordances to functional features of an item, that facilitated action.

The third development of the original concept of affordances was led by Gaver (1991), who expanded the theory from the confines of purely visual and tangible qualities and introduced an auditory sense. Following the Gestalt approach, Gaver further broadened the scope from being a solitary object to multiple or grouped items displayed in a sequential process and thus recognised the user design application of affordances within the field of technology. As properties for action, Gaver (1991) suggested that the application of an affordance was centred around relevance to the actor. He classified types of affordances as; false, hidden and perceptible. This was contingent on whether the observable information was convenient and whether an affordance was offered. In the case of hidden affordances, mediation may be required. As an example, websites include interface signs which can appear as hidden affordances (e.g. the three horizontal lines ☰ navigation button) until recognised or until mediation such as a 'click here' arrow appears. Gaver further added sequential (revealed over time) and nested (grouped) affordances (1991, p. 82).

3.4.2 Affordances within marketing

Whilst reviewing theory in marketing studies, Hackley (2009a), observed how the domain of marketing adopts theories (p. 112), from other realms and this study follows this path, harnessing the theory of affordances which originated from ecological psychology. However, the domain of marketing is not alone in borrowing the concept of affordances, as this is a multivalent theory which has been used in fields including psychology (Gibson, 1979, 1986; Chemero, 2003), product design (Norman, 1988), sociology (Hutchby, 2001), communication theory (Argyris and Monu, 2015; Nagy and Neff, 2015; Evans *et al.*, 2017), tourism (Cabiddu, de Carlo and Piccoli, 2014), local and national government practice (Klang and Nolin, 2011; Malsbender, Hofmann and Becker, 2014; Chen et al., 2016), human computer interaction, design (Pols, 2012; Zhao et al., 2013), and technology (Gaver, 1991; McGrenere and Ho, 2000; Markus and Silver, 2008).

Furthermore, affordances as a lens has been used in aspects of social media, although applied to individuals, concerning societal issues such as: digital activism (Earl and Kimport, 2013); micro-volunteering (Ilten, 2015); changing online behaviour (Wellman *et al.*, 2006; boyd, 2010; Rathnayake and Suthers, 2018); digital labour (Postigo, 2016); privacy (Trepte, 2015); and identity (Khazraee and Novak, 2018).

Whilst affordances have been used in many domains, led by ecological psychology, which witnessed the nominalisation, there are differing perspectives concerning its construct. Those espousing the original work of Gibson (1986), considered affordances as properties of the environment which provide potential for action, and recognised the relational and contextual aspects of affordances. A different, less complex and functional perspective of the features of the technology, was originally proposed by Gaver (1991), which heralded the application of affordances as the features of the technology. Insights into why there was this move towards a more functional approach, can be found in the *Communication Yearbook*, where Treem and Leonardi (2013, p. 146), explicated that:

> Scholars who study the relationship between new technologies and social practices have found great utility in the affordance concept because it helps to explain why people using the same technology may engage in similar or disparate communication and work practices.

Thus Treem and Leonardi (2013), extracted the functional aspects of social media platforms to explicate affordances as features of a technology that facilitated action, a notion followed by others exploring social media (Ilten, 2015; Postigo, 2016; Karahanna *et al.*, 2018; Rathnayake and Suthers, 2018), as well as in other domains, where the materiality and functionality of the features, without the connection to social impact, was investigated (Ellison and Vitak, 2014).

Categorising affordances as ‘warm and cold’ was an approach taken by Trepte (2015, p. 1), where both the warm and cold affordances represented the functional features of a technology that facilitate action - the difference concerned acceptable (warm) and unacceptable (cold) actions relating to personal privacy. The challenge with this categorisation is that a comment on Facebook may be classified as a warm and warranted affordance in one context, yet cold and unwarranted in another, thus this categorisation is subject to the vagaries of a specific situation and susceptible to immediate change. A further categorisation of affordances was provided in the first edition of the *SAGE Handbook of Social Media*, as Bucher and Helmond (2018, p. 12), considered 'high-level and low-level affordances', the high-level represented Gibson's abstract definition, whereas the low-level comprised the functional features of technology. Whilst this classified the two positions, the low-level emanated from the realms of design and technology (Norman, 1988; Smets, Overbeeke and Gaver, 1994), where practical action was sought. However, some scholars merged the two levels (Majchrzak *et al.*, 2013; McVeigh-Schultz and Baym, 2015; Khazraee and Novak, 2018; Rathnayake and Suthers, 2018), deeming affordances to comprise both the high-level properties of the environment and its action potential, as well as the low-level functional features of a technology that facilitated action.

Furthermore, as affordances have been applied within domains of technology and information systems, they have been considered as a useful bridge between technological determinism and social constructivism (Nagy and Neff, 2015). One such example is found in the work of McVeigh-Schultz and Baym (2015, p. 2), who explored 'vernacular affordances' within a micro-social app, developing the notion of material sense-making between actors, although acknowledging that affordances are both properties of the environment and its action, as well as potential features of a technology that facilitate action. The link between technology and society was explored by Wellman *et al.* (2006), who investigated different community groups and the impact of the internet. Whilst the word affordances appeared in the title of their work, the focus was technological determinism and the functional attributes of the internet, hence their notion of affordances were simply features of the technology. Similar stances were adopted by others (Graves, 2007; Markus and Silver, 2008; Khazraee and Novak, 2018), who harnessed affordances to contemplate the link between technology and society, recognising affordances as property of the environment, as well as the functional elements of the social media platform.

Thus whilst affordances have been applied within several domains, including marketing, the ontological debate concerning the nature of affordances remains. Some have adopted, as described by Bucher and Helmond (2018), the high-level affordances which represent properties of the environment and its action potential, and others prefer the reductionist approach focused on features, or the low-level affordances where the consideration is the functional aspects of technology that facilitate action. There are a number of scholars who have mixed both perspectives and therefore Table 3.3 shows the application of affordances theory in different domains, illustrating the focus of the research and core construct as the high-level, low-level or mixed approach.

Table 3.3 Application of affordances theory in different domains, illustrating the focus of the research and core construct

AUTHOR (YEAR)	DOMAIN	FOCUS OF RESEARCH	HIGH-LEVEL: PROPERTIES OF THE ENVIRONMENT	LOW-LEVEL: FUNCTIONAL FEATURES OF A TECHNOLOGY
Gibson (1986)	Psychology	Theoretical		
Turvey (1992)	Ecological Psychology	Theoretical		
Stoffregen (2000)		Theoretical		
Chemero (2001, 2003)		Theoretical		
Michaels (2003)		Theoretical		
Heft (2003)		Theoretical		
Treem and Leonardi (2013)	Social Media	Technology in organisations		
Majchrzak *et al.* (2013)		Knowledge sharing in organisations		
Ilten (2015)		Individual activism		
Trepte (2015)		Privacy of individuals		
Georgakopoulou (2015)		Small stories		
McVeigh-Schultz and Baym (2015)		Couples		
Pearce, Barta and Fesenmaier (2015)		Relational maintenance in societies		
Postigo (2016)		YouTube and gaming		
Laestadius (2017)		Instagram		
Rathnayake and Suthers (2018)		Twitter Hashtags		
Khazraee and Novak (2018)		Collective identity		
Bucher and Helmond (2018)		Theoretical and Twitter		
Karahanna *et al.* (2018)		Individual needs		
boyd (2010)	Social Networks	Networked publics		
Ellison and Vitak (2014)		Social network sites		

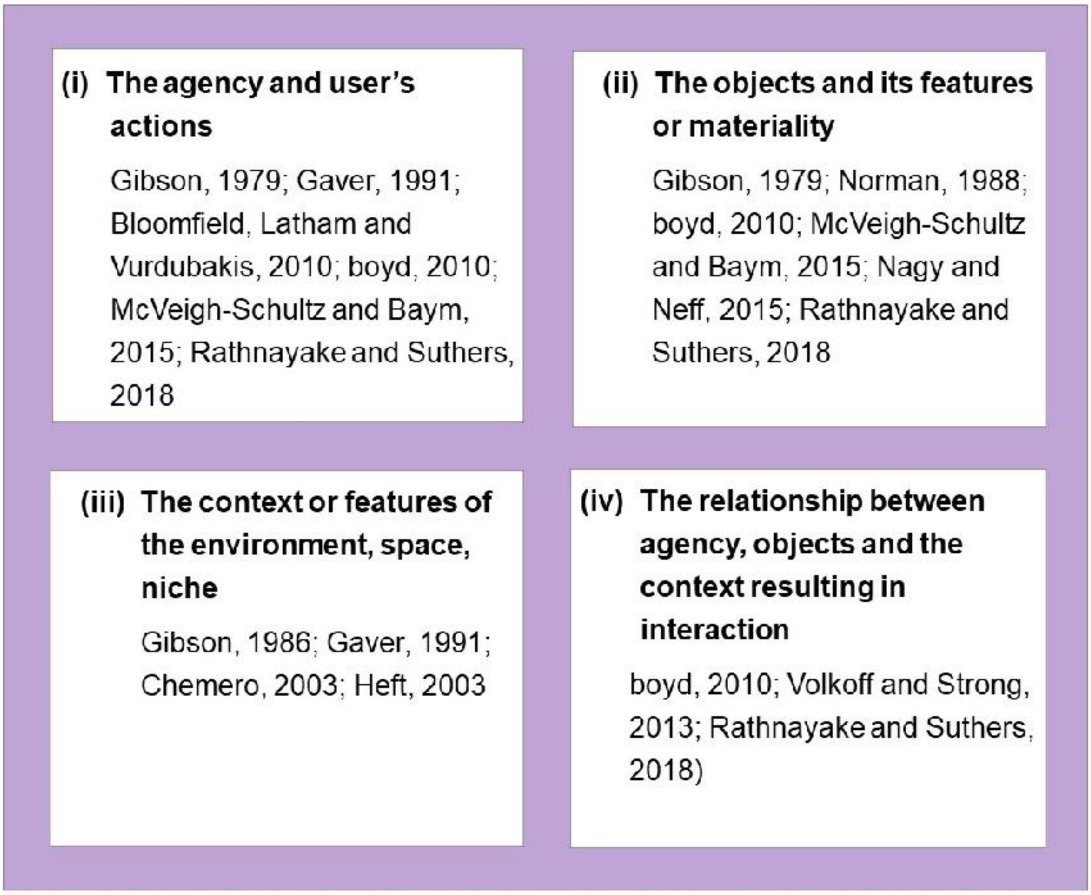
AUTHOR (YEAR)	DOMAIN	FOCUS OF RESEARCH	HIGH-LEVEL: PROPERTIES OF THE ENVIRONMENT	LOW-LEVEL: FUNCTIONAL FEATURES OF A TECHNOLOGY
Wellman et al. (2006)	Communication - Computer-Mediated	Community groups		
Graves (2007)		Blogging		
Parchoma (2014)		Collaborative learning		
Nagy and Neff (2015)		Theoretical and communication		
Evans *et al.* (2017)		Theoretical and communication		
Markus and Silver (2008)	Technology - Information Systems	Information Technology		
Leonardi (2011)		Organisational change		
Leidner, Gonzalez and Koch (2018)		Enterprise social media and employee on-boarding		
Gaver (1991)		Technology		
Earl and Kimport (2013)		Individual activism		
Fayard and Weeks (2014)		Technology and people in organisations		
Smets, Overbeeke and Gaver (1994)	Technology - Graphical Interfaces	Visual forms		
McGrenere and Ho (2000)		Human-computer interaction		
Norman (1988)	Design	Product design		
Hutchby (2001)	Sociology	Technological artefacts		
Bloomfield, Latham and Vurdubakis (2010)		Disabled individuals		
Volkoff and Strong (2013)	Management	Information systems and organisational change		
Hauge (2018)		Valuation studies		

Thus, as the theory of affordances has been applied in elements of organisational settings (Treem and Leonardi, 2013; Volkoff and Strong, 2013; Leidner, Gonzalez and Koch, 2018) and separately within elements of social media usage (Majchrzak *et al.*, 2013; Ilten, 2015; McVeigh-Schultz and Baym, 2015; Trepte, 2015; Postigo, 2016; Bucher and Helmond, 2018; Karahanna *et al.*, 2018; Khazraee and Novak, 2018; Rathnayake and Suthers, 2018), it is an apposite fit with this study which seeks to harness affordances theory, as applied to social media, within an organisational setting. Furthermore, none of the earlier works have investigated affordances as applied to social media marketing within organisations.

3.4.3 Affordances – core attributes

Notwithstanding the variations and ambiguity around the theory of affordances, scholars have assigned varying attributes to the concept. This section synthesises these components to offer four core attributes of affordances, which are shown in Figure 3.1, with examples of extant literature and is subsequently discussed in the following sections.

Figure 3.1 Core attributes of affordances



3.4.4 Affordances – core attributes: The agency and users' actions

Gibson's standpoint was the external environment and he postulated that affordances were objective and independent, whilst simultaneously being subjective and dependent on the actor, who may not perceive or access the affordance, depending on their situation, or, as suggested by McGrenere and Ho (2000), the actor may not have the capabilities to gain from the affordance. Gibson (1979) and McGrenere and Ho (2000) concurred that an affordance remains the same regardless of the requirements of the actor. Whilst Gibson's concept considered human or animal agency, this agency within a social media setting has been recognised as the users, often within specific platforms, such as Instagram (Laestadius, 2017), Twitter (Rathnayake and Suthers, 2018) and Facebook (Khazraee and Novak, 2018).

Nagy and Neff (2015), remarked that agency, within the domain of communications, has moved from the technology to the users, although this was Gibson's original definition (Gibson, 1986, p. 127), 'the affordances of the environment are what it offers the animal, what is provides or furnishes', thus the animal or agent is the locus of the affordance, without which it cannot exist.

3.4.5 Affordances – core attributes: The objects and its features or materiality

There are several illustrations of affordances in terms of their materiality. Firstly, considering the external environment, Gibson (1979), provided an example of an external horizontal, rigid surface as an affordance - offering a person support, although not designed with this in mind, as it could simply be a natural phenomenon in that setting. Another - a frequently used example - is a chair. Its affordance is not as a chair, but as somewhere to sit, store items or something on which to step up higher. From a design perspective, Norman (1988), might have considered a chair as a piece of artwork.

Further characteristics of the materiality affordances were developed when applying the notion to social media for users where online material in this context has: replicability – it can be reproduced (boyd, 2010), scalability – it can be widely shared (boyd, 2010; Trepte, 2015; Khazraee and Novak, 2018), searchability – it can be found via search mechanisms (boyd, 2010), performance – users can dramatically contribute to a narrative (Khazraee and Novak, 2018), interpretability – open to rich analysis (Laestadius, 2017), and discourse – enables engaging with others (Khazraee and Novak, 2018).

Addressing opportunities for action, the materiality of technological affordances has been recognised as functional elements that facilitate these activities (Postigo, 2016), such as capturing images (Laestadius, 2017), uploading videos (Georgakopoulou, 2017), adding hashtags to connect and interact (Rathnayake and Suthers, 2018) or creating communities (Khazraee and Novak, 2018).

3.4.6 Affordances – core attributes: The context or features of the environment

Following Gibson (1986), boyd (2010) suggested that the people (networked publics) were moulded by the affordances within the platform architecture. This is echoed by others who logically re-focused the context or claimed the environment as being the technology, which acted as the enabler or frame (Earl and Kimport, 2013; Postigo, 2016).

3.4.7 Affordances – core attributes: The relationship between agency, objects and the context resulting in interaction

According to Nagy and Neff (2015, p. 3) 'Affordances may be present for only one individual or a group of individuals but not for others' which resonates with Gibson's original concept of affordances being 'unique for that animal' (Gibson, 1986, p. 127). This was affirmed by Heft (2007), explicating the relational nature of affordances.

Pearce, Barta and Fesenmaier (2015), extended the relational aspect of affordances to infer that they provided 'opportunities for strategic relational maintenance' (p. 8) and Graves (2007), examined the affordances of blogging and suggested that a relational affordance was the capacity to juxtapose articles concerning corresponding topics, with these aggregations providing further scrutiny into a subject. Khazraee and Novak (2018), found the theory of affordances a commodious method to connect social and technical relationship elements, thus linking technological determinism and social constructivism.

Perception is recognised in the field of psychology as 'the organisation and interpretation of incoming sensory material' (Gross, 2015, p. 246) and the central theme is Gibson's perceived affordances which were extended to imagined affordances by Nagy and Neff (2015), who did not consider the notion established in psychology, of perceived affordances from the 'knower and the known' (Richards, 2009, p. 64). Whilst key texts in psychology failed to offer a formal definition of imagination (for example: Richards, 2009; Gross, 2015), this is a factor acknowledged in an earlier work by Dexter (1943), who explored imagination and thus she drew upon earlier works describing the phenomenon variously from creative deliberation to mental manipulation, which could invoke past experiences. Gibson's work in ecological psychology adopted a direct view of perception, yet according to Gross (2015), other scholars embraced an indirect and traditional view which sees perception as incomplete and constructive based on the 'best interpretation of the available data' (Gross, 2015, p. 255) which necessitates creative thought. Thus the line between perception and imagination is blurred and therefore represents a conceptual difference, rather than a novel type of affordance, as suggested by Nagy and Neff (2015).

3.4.8 Affordances of social media usage within organisations

Notwithstanding the different approaches to consider affordances in the field of social media, there has been less exploration of affordances of social media within organisations. Treem and Leonardi (2013), reviewed studies that considered the use of social media in organisations. From this they identified four affordances of social media: visibility, persistence, editability, and association.

Whilst their notion of visibility concerned 'the amount of effort people must expend to locate information' (Treem and Leonardi, 2013, p. 150), this is part of Gibson's (1979), and Norman's (1999), original concept, that perceived affordances pertained to vision. Thus for an affordance to exist, it must be visible, or when Gaver (1991), developed the notion, be perceptible to auditory or tactile senses. Gibson and Norman asserted that an affordance had to be perceived to exist and the level of effort would depend upon the agency and the context. Thus attributing visibility as an affordance demonstrates a lack of comprehension of the original texts – without some form of visibility there could be no perceived affordance.

Another aspect to affordances is constancy, or remaining static, which was interpreted by boyd (2010), and Treem and Leonardi (2013), who propounded that online content remains available, once the user has left the platform and thus this second affordance of persistence resonated with the notion of variance from Gibson (1979), and McGrenere and Ho (2000), insomuch as the affordance was invariant and lacked the possibility to change. However, this concept of always available content, an affordance termed 'fixity' by Graves (2007, p. 341), fails to recognise that the world is constantly changing and thus affordances cannot be static (Heft, 2003). This argument is not well-founded as online content can be deleted by users (Rheingold, 1993; Dean, 2010), which is a function made available through several platforms (Facebook Inc., 2012; Schmidt and O'Connor, 2015), erased by the platform (Langvardt, 2018), or removed by request within a privacy framework (Verčič, Verčič and Sriramesh, 2015) and thus can change. Whilst there are exceptions, such as deleted tweets from politicians which can be immediately captured by online tools such as Politwoops (Meeks, 2018), there is nonetheless, the possibility that online content can change. Furthermore, several social media platforms where content was present have been discontinued and access to the content is no longer available (for example; Google Buzz - closed 2011, Gowalla - closed 2012, Friends Reunited - closed 2016, YikYak - closed 2017), removing the notion of all online material being ever-present. Therefore identifying persistence within an online setting as an affordance lacks validity.

Nagy and Neff (2015), claimed to introduce their imagined affordance as being dynamic and having the capacity to change, suggesting this had hitherto not been recognised within affordances. However, Turvey (1992, p. 175), had earlier acknowledged the notion of dynamism 'there are no changeless things and there are no thingless changes; there are only changing things', as did Heft (2003, p. 171), who appreciated the potential of a changed or altered state within affordances whereby 'features of the environment can possess alternative affordances at different times in the context of different encounters'. Comprehending affordances outside a static state, Heft (2003) suggested that these intended or unintended changes could occur due to environmental, geographical, behavioural, or sociocultural contexts. Thus it appears that the work by Nagy and Neff (2015), failed to consider earlier pertinent work.

Editability was a further affordance proposed by Treem and Leonardi (2013), where users could edit content before, or after, sharing in an online setting. They argued that the ability to alter content enabled actors to manipulate shared information. Moreover, to focus specific messages to certain groups and ameliorate the original content. This element of publishing control is a long-recognised feature within several social media platforms that has been recognised by others (Walther, 2011; Crowston and Fagnot, 2018). Thus editability could be acknowledged as a functional affordance, although it is considered a key aspect of social media (Knobel and Lankshear, 2007; Palfrey and Gasser, 2008; Vuori and Jussila, 2016).

The final affordance promulgated by Treem and Leonardi (2013), was association between individuals. This element of connection or tie strength (Granovetter, 1973), was one of the core attributes surrounding the relationships between actors. This issue is whether this is an affordance or the raison d'être for many social media networks.

More recently Hauge (2018), addressed affordances within an organisational setting, linking the concept to 'situated valuation' (p. 245), which selected a pragmatic perspective and observed that affordances had utility as 'a lens for understanding the influence of technology' (p. 253), which validated earlier work from Fayard and Weeks (2014), who considered that affordances offered a context for exploring technology within different settings.

Thus having considered core attributes of affordances for social media within an organisational context, a framework is needed to better understand what constitutes an affordance.

3.4.9 Frameworks for affordances

Affordances may therefore be false, hidden, offer inherent or emerging properties, be nested or be sequential (Gaver, 1991; Markus and Silver, 2008). They are constant, useful, usable and present possibilities for action, irrespective of the actor's requirements, ability or perception. Having determined the construct, there may remain questions as to what constitutes an affordance. Pols (2012) proposed a description of affordances model, which provided a four-tier hierarchical structure and discussed here and applied in Table 3.4. To contextualise this model, examples are provided which apply to social media usage.

Table 3.4 Description of affordances model, with examples

TIER	OPPORTUNITY FOR	EXPLANATION	EXAMPLE
1	Manipulation	The actor could use the item to gain a benefit	A user could sign up to a social media platform, a basic and simple action.
2	Effect	The actions as a result of the manipulation	The user has signed up for a social media platform and the effect is finding old friends online.
3	Use	How the user can use the affordance	The user could use the social media platform as a mechanism to meet up with old friends.
4	Activity	The effect on the social world of the use	The user meets up with old friends, they may reflect on both lives to date and make material changes as a result, such as returning to education, changing jobs or even relationships.

Source: Adapted from Pols (2012).

Whereas Gaver (1991), briefly mentioned sequential effects, Pols illustrated sequential affordances through these tiers which illustrated progressive and consecutive benefits from an initial action, although they could be simultaneous.

That notwithstanding, Pols provided a convenient structure that explicated certain characteristics based on a hierarchical scale.

Sequential or hierarchical affordances were further proposed by Volkoff and Strong (2013) and Leidner, Gonzalez and Koch (2018).

Volkoff and Strong (2013, p. 826) offered a hierarchy of (i) basic affordances, (ii) standardizing and integrating affordances, (iii) visibility affordances, and (iv) controlling affordances. The basic affordances included technology functions such as ’recording data’ (p. 824), which resonates with recordability, identified as a critical benefit of social media for organisations (Argyris and Monu, 2015). The second level was ‘Standardizing and Integrating Affordances’ (p. 826), which was not identified as a critical benefit for organisations and could be considered as a management function. Their third affordance, Visibility, is a monitoring function for managers and was identified by Argyris and Monu (2015), as an affordance for social media use for external communication, whereas the application by Volkoff and Strong (2013), was an internal function. The final stage was ‘Controlling Affordances’ (p. 826), although this is about management of people, rather than any form of affordance and one example they provided was ‘Controlling which individuals can perform each transaction’ (p. 826). They remarked that their notion of affordances ‘arises from the relation between an object and a goal-directed actor’ (p. 824), yet in some cases (levels two and four) their descriptions more closely match tasks between managers and staff, rather than specific affordances.

Within the domain of information systems, Leidner, Gonzalez and Koch (2018, p. 120), suggested that ‘The affordance lens is a powerful tool for helping IS [information systems] researchers understand the choices made regarding a technology and the consequences of these choices’. This was a move away from the low-level or functional features of affordances towards the specific benefits provided as a result of its application. They further proposed two levels of affordances; first-order and second-order. This was a sequential model where the first-order affordances facilitated the second, such as the first-order affordance 'interacting with peers, enabled the second-order affordance of 'finding resources' (Leidner, Gonzalez and Koch, 2018, p. 125). However, this notion had earlier been proposed by Gaver (1991, p. 82), who described sequential effects, which, as has been discussed, was extended by Pols (2012, p. 120), in his 'descriptions of affordance model' which showed a hierarchical sequence.

Whilst, Pols created a framework for characterising affordances, he omitted to define what an affordance is, or is not. This was explored by Argyris and Monu (2015) who designated eight affordances for the corporate use of social media. The aim was to evaluate the usefulness of social media within the context of external communication to stakeholders, investors, customers and the general public. Table 3.5 illustrates an adapted version of the eight critical affordances identified by Argyris and Monu for external stakeholder communication.

Table 3.5 The eight affordances for social media use for external communication

AFFORDANCE	**POTENTIAL USE FOR ORGANISATIONS**
Presentability	- Present the organisation's images in a desirable way - Manage images / reputation - Persuade stakeholders by providing positive images
Self-expression	- Act as influencers on others - Participate in value creation - Provide input for new product development
Monitorability	- Enhance information management processes - Listen to investors' voices - Learn about market sentiment
Reach	- Reach external stakeholders - Provide information to the general public
Engagement	- Engage external stakeholders in continuous conversations - Maintain relationships with stakeholders

AFFORDANCE	POTENTIAL USE FOR ORGANISATIONS
Connectivity	Encourage external stakeholders to connect with other stakeholders Disseminate information with greater effectiveness Identify influencers
Recordability	Record and save conversations with stakeholders Manage documents with many external parties
Availability	Aid corporate communication with documents available at any time and place

Source: Adapted from Argyris and Monu (2015, p. 150).

This may have been an early explanation of the benefits of social media for organisations, albeit within the context of corporate communications. However, within these affordances, Argyris and Monu stepped beyond the scope of stakeholder communication to incorporate: new product development; social listening; document management; and document distribution. Their focus on stakeholders unsurprisingly included communication, which has been a recurrent theme proposed by several researchers (see for example Cann, Dimitriou and Hooley, 2011).

Argyris and Monu overlooked collaboration as an affordance, which was investigated in depth by Gaver (1992), within an online synchronous environment. Whilst their research provided an index of affordances as applied to social media, it lacked guidance on defining affordances. Positing what an affordance may or may not be was addressed by Evans *et al.* (2017, p. 5), who recognised the situation and created a threshold criterion as a 'straightforward method for researchers to conceptualize and apply affordances in their research'. This construct involved three criteria which are shown in Table 3.6 and discussed in this section.

Table 3.6 Conditions for affordances

CRITERIA	
1	Confirm proposed affordance is neither the object nor a feature (function) of the object
2	Confirm the proposed affordance is not an outcome
3	Confirm the proposed affordance has variability.

Source: Adapted from Evans et al. (2017).

The study by Evans *et al.* (2017), was timely as the development of a framework for affordances. According to Yadav and Pavlou (2014), affordances based on Norman's concept, '[have] the potential of providing new insights about social networks' (p.32-33), and considering the benefits for organisations they suggested that 'as social networking platforms continue to evolve, a systematic exploration of their current (and future) affordances can help address some of these issues' (p. 33). Therefore, within a pragmatist ontology and epistemology a framework provides utility to classify affordances within social media from the perspective of the organisation, which the remainder of this section will propose.

Extant literature from Argyris and Monu (2015), Cann, Dimitriou and Hooley (2011) and Vuori and Jussila (2016), offers a useful frame of potential affordances that can be applied to the threshold criteria proposed by Evans *et al.* (2017). Additionally, the earlier identified individual social media usage, shown in Table 2.3 are added to this frame, along with the examples of critical benefits from social media for organisations, that were pinpointed in Table 3.2, to test additional affordances that could be applied to organisations.

Thus the extant literature provided twenty-seven items as critical benefits for organisations, to be considered as an affordance, using the 'threshold criteria' framework provided by Evans *et al.* (2017, p. 36). To reduce duplication, the twenty-seven items were reduced to twenty-three items by merging five similar elements (shown in red) and these are shown in Table 3.7 which provides the sources where identified in the extant research.

Table 3.7 Critical factors for social media use by individuals and organisations with the sources where identified in extant research, to be considered as an affordance

CRITICAL FACTORS FOR SOCIAL MEDIA USE	BY INDIVIDUALS[7]	BY ORGANISATIONS[8]	SOURCES FROM EXTANT RESEARCH	TO BE CONSIDERED AS AN AFFORDANCE
Availability		✓	Argyris and Monu, 2015	Merged with information as this concerned the 24/7 availability of online content or information
Brand management (includes Brand awareness, brand building and brand presentability)	✓	✓	Muntinga, Moorman and Smit, 2011; Gensler *et al.*, 2013; Pletikosa-Cvijikj and Michahelles, 2013; Argyris and Monu, 2015; Wattanacharoensil and Schuckert, 2015; Hamilton, Kaltcheva and Rohm, 2016	Yes
Brand awareness and brand building		✓	Gensler *et al.*, 2013	Merged under brand management
Collaboration		✓	Vuori and Jussila, 2016	Yes
Combining		✓	Vuori and Jussila, 2016	Yes
Communication	✓	✓	Whiting and Williams, 2013; Luchman, Bergstrom and Krulikowski, 2014; Vuori and Jussila, 2016	Yes
Community development	✓	✓	Kozinets, 1999; Watts, Dodds and Newman, 2002; boyd and Ellison, 2007; Baird and Parasnis, 2011; Vuori and Jussila, 2016	Yes
Completing		✓	Vuori and Jussila, 2016	Yes
Connectivity		✓	Argyris and Monu, 2015; Vuori and Jussila, 2016	Yes

[7] Located in Chapter 2: paragraph 2.3, Uses and gratifications theory of social media usage
[8] Located in Chapter 3: paragraph 3.2, Functionality and purpose of social media tools; and 3.3 Critical benefits of social media for organisations

CRITICAL FACTORS FOR SOCIAL MEDIA USE	BY INDIVIDUALS[7]	BY ORGANISATIONS[8]	SOURCES FROM EXTANT RESEARCH	TO BE CONSIDERED AS AN AFFORDANCE
Convenience utility	✓		Whiting and Williams, 2013	Yes
Customer segmentation		✓	Canhoto, Clark and Fennemore, 2013	Yes
Customer service	✓	✓	Baird and Parasnis, 2011; Muntinga, Moorman and Smit, 2011; Canhoto and Clark, 2013; Hamilton, Kaltcheva and Rohm, 2016b	Yes
Engagement (includes social interaction, self-expression)	✓	✓	Shao, 2009; Baird and Parasnis, 2011; Muntinga, Moorman and Smit, 2011; Whiting and Williams, 2013; Luchman, Bergstrom and Krulikowski, 2014; Argyris and Monu, 2015; Krishen *et al.*, 2016	Yes
Entertainment	✓		Shao, 2009; Muntinga, Moorman and Smit, 2011; Whiting and Williams, 2013; Luchman, Bergstrom and Krulikowski, 2014; Hamilton, Kaltcheva and Rohm, 2016b	Yes
Information (includes 24/7 availability of online content or information)	✓	✓	Shao, 2009; Baird and Parasnis, 2011; Muntinga, Moorman and Smit, 2011; Whiting and Williams, 2013; Luchman, Bergstrom and Krulikowski, 2014; Argyris and Monu, 2015; Hamilton, Kaltcheva and Rohm, 2016a	Yes
Market and product research	✓	✓	Baird and Parasnis, 2011; Weinberg *et al.*, 2013; Rolland and Parmentier, 2014	Yes
Monitorability / surveillance (includes Recordability)	✓	✓	Whiting and Williams, 2013; Argyris and Monu, 2015	Yes
Multimedia / content	✓	✓	Shao, 2009; Muntinga, Moorman and Smit, 2011; Kietzmann *et al.*, 2012; Abrantes *et al.*, 2013; Hamilton, Kaltcheva and Rohm, 2016a; Vuori and Jussila, 2016	Yes

CRITICAL FACTORS FOR SOCIAL MEDIA USE	BY INDIVIDUALS[7]	BY ORGANISATIONS[8]	SOURCES FROM EXTANT RESEARCH	TO BE CONSIDERED AS AN AFFORDANCE
New product development	✓	✓	Baird and Parasnis, 2011; Rathore, Ilavarasan and Dwivedi, 2016	Yes
Personal identity / status	✓		Shao, 2009; Muntinga, Moorman and Smit, 2011; Krishen *et al*., 2016	
Presentability		✓	Argyris and Monu, 2015	Part of brand presentation, thus merged under brand management
Reach		✓	Argyris and Monu, 2015	Yes
Recordability		✓	Argyris and Monu, 2015	Merged with monitorability / surveillance
Relaxation / pass time	✓		Whiting and Williams, 2013	Yes
Remuneration (offers)	✓		Muntinga, Moorman and Smit, 2011	Yes
Sales cycle (testimonies and reviews)	✓	✓	Baird and Parasnis, 2011; Muntinga, Moorman and Smit, 2011; Hamilton, Kaltcheva and Rohm, 2016a; Saboo, Kumar and Ramani, 2016	Yes
Social interaction, including self-expression	✓		Shao, 2009; Muntinga, Moorman and Smit, 2011; Whiting and Williams, 2013; Krishen *et al*., 2016	Merged with engagement

3.4.10 Affordances meeting the threshold criteria

The next stage was to explore whether the proposed affordances met the threshold criteria proposed by Evans *et al.* (2017).

- Criterion 1: Is it an object or a feature of the object? If the response is yes, this is an object, feature or function of the social media platform; this does not meet the criterion and will fail.

- Criterion 2: Is it an outcome? If the response is yes, this is an outcome of the social media platform; this does not meet the criterion and will fail.

- Criterion 3: Does it have variability? If the response is no, there is no variability in this element; this does not meet the criterion and will fail.

The model by Evans *et al.* (2017), was further extended as this study concerns the organisational usage of social media affordances and thus an additional criterion was created:

- Criterion 4: Does this apply to organisations? If the response is no, there is no application to organisations and thus it does not meet the criterion and will fail.

The criteria proposed by Evans *et al.* (2017), are discussed further in this section and subsequently applied to the affordances.

1 Confirm proposed affordance is neither the object nor a feature of the object

The first criterion proposed by Evans *et al.* (2017), was to acknowledge the role of the actor within the setting. A chair is a mere object without a person requiring relaxation. This related to earlier definitions, such as Gibson (1979, p. 133), ‘to perceive as an affordance is not to classify an object’ and McGrenere and Ho (2000, p. 1), who suggested that ‘an affordance exists relative to the action capabilities of a particular actor.' Without the actor there is no affordance. McGrenere and Ho (2000), provided the example that whilst a smartphone has a camera, the camera is not the function of the smartphone and provides an affordance, which is the action of recordability.

2 Confirm the proposed affordance is not an outcome

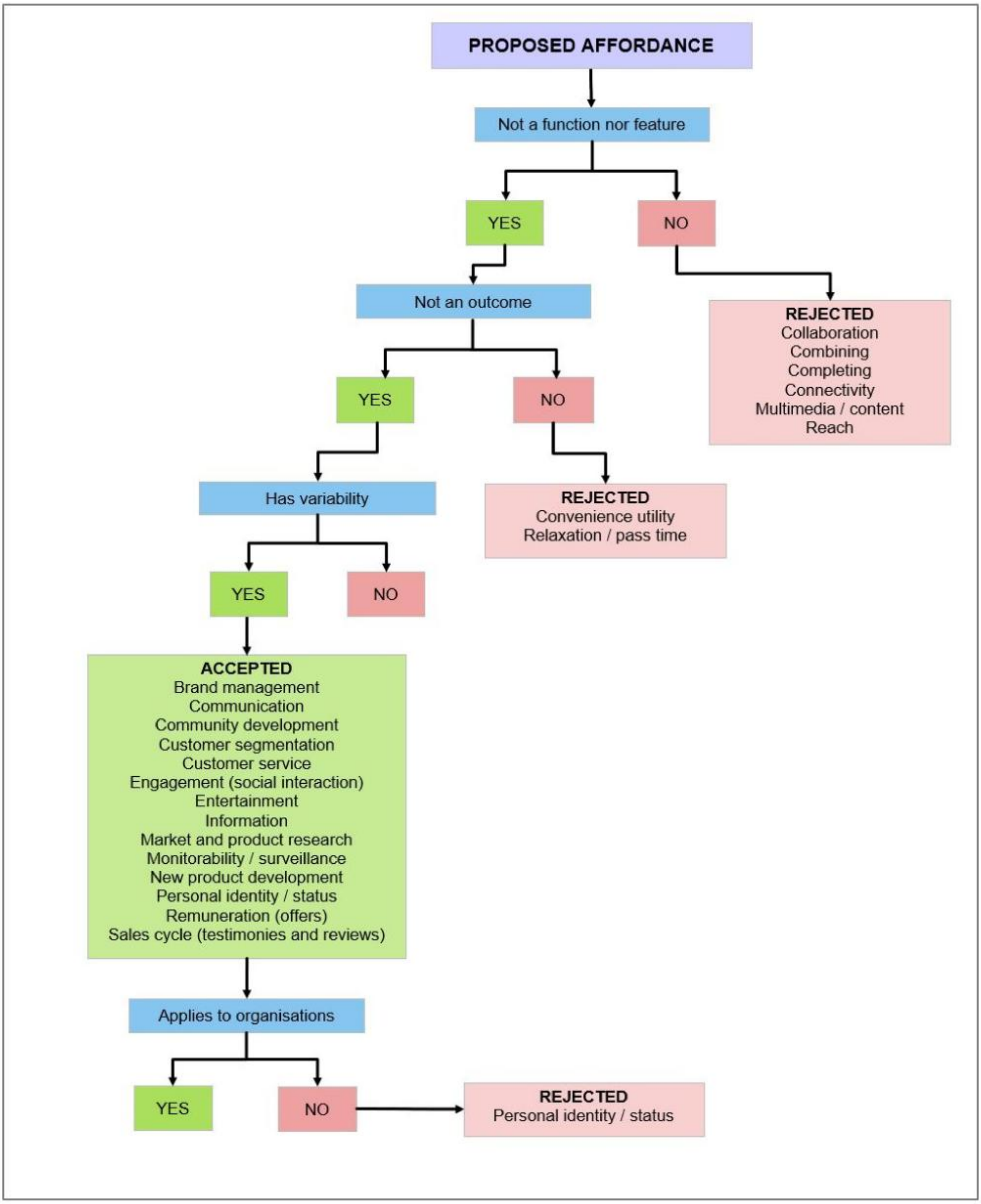
Whilst affordances may provide outcomes, criterion two states that the proposed affordance is not an outcome, but the effect or action from that outcome. This is similar to Pols' (2012), description of the affordances model, where a user has signed up for a social media platform and the effect is finding old friends online. The outcome is not signing up to social media, but finding friends. This could be described as a serendipitous benefit.

3 Confirm the proposed affordance has variability

The criterion, 'confirm the proposed affordance has variability' (p. 6), contradicted both Gibson (1979, p. 137), who suggested that affordances were invariant, and McGrenere and Ho (2000, p. 2), who adopted Gibson's perspective. Evans *et al.* (2017), postulated that affordances had scales and were not binary which reiterated the earlier suggestion from McGrenere and Ho (2000), regarding Gibson's simplistic dyadic outlook.

Therefore to assess whether the critical factors for social media use by individuals and organisations that were identified in Table 3.7, met the affordances criteria, a decision tree was employed as a useful evaluation tool (Makropoulou, 2011). This processed each proposed affordance through the yes / no process to ascertain whether it met the threshold criteria and is shown in Figure 3.2.

Figure 3.2 Decision tree to meet affordances criteria



3.4.11 Accepted affordances of social media for organisations

Thus the affordances for social media use which were identified in extant literature, include; brand management, communication, community development, customer segmentation, customer service, engagement (social interaction), entertainment, information, market and product research, monitorability / surveillance, new product development, remuneration (offers), and sales cycle (testimonies and reviews).

This section subsequently discusses each of the affordances of social media for organisations that have met the threshold criteria (Evans *et al.,* 2017), and are therefore accepted. Additionally, this section includes the affordances that met Criterion 4, the application to organisations.

Affordance 1: Brand management (presentability, brand awareness, brand building)

Argyris and Monu (2015) termed this presentability, as an affordance that enables organisations to manage their online image and reputation. Taking a different approach, Gensler *et al.* (2013) discussed the notion of organisations being the authors of their online brand stories and both studies referred to online brand management, which is identified as the affordance. Applying the criteria from Evans *et al.* (2017), brand management is not an object and therefore meets criterion one. Considering criterion two, brand management is a process offered indirectly by social media networks and therefore not an outcome. The third criterion considers variability which is certainly the case with brand management. Therefore brand management is confirmed as an affordance.

Affordance 2: Communication

Described by many scholars as an aspect of social media (see for example: Cann, Dimitriou and Hooley, 2011; Whiting and Williams, 2013; Luchman, Bergstrom and Krulikowski, 2014; Vuori and Jussila, 2016), the issue is whether this meets the threshold criteria.

Applying criterion one and reflecting whether communication is a feature of the object, is a challenge, as the response could be dependent upon the social media platform. The better question may be: is communication a feature of the object for organisations? In most cases, this was an affordance discovered by organisations. Equally, communication may be seen as a feature of the technology, yet the concept of communicating exists outside of the technology.

Regarding the second criterion and whether communication is an outcome, communication *per se* is not the outcome which may be a resolution or response, which is the outcome. Criterion three is simpler to confirm as there are ranges of communication types and this varies within organisations. The conclusion is that communication is an affordance.

Affordance 3: Community development

McQuail's (1983) four motivations for media use included integration, which was about a sense of belonging. Shao (2009) suggested that part of the uses and gratifications of social media was to be part of a community and potentially develop a community based on content about shared interests.

Applying the threshold criteria, this is neither an object, nor the feature of the object. Being part of the community may not be the outcome, rather the outcome that is the gaining knowledge and sharing views. In terms of the third criterion of variability, this is certainly evidenced in the range of online groups, therefore community development is an affordance.

Affordance 4: Customer segmentation

Canhoto, Clark and Fennemore (2013) researched the use of social media to identity and profile customers. Customer segmentation is not a feature of the object as it was not part of the original concept of social media networks. It has occurred as organisations have realised this benefit. It complies with the second criterion, as the outcome is more likely to be focused messages or other factors such as 'a source of customer insight' (Canhoto, Clark and Fennemore, 2013,

p. 419). The third criterion as to whether there is variability is met as the customer data varies according to the platform and to local legalisation. Therefore customer segmentation is an affordance.

Affordance 5: Customer service

Providing customer service or responding to customers' online queries and comments have been discussed by several researchers (see for example: Canhoto and Clark, 2013). In terms of meeting the affordance criteria, as this was not the original concept behind the social media networks, this meets the first criterion. The second, whether this is an outcome, is a more interesting question, although the purpose of customer service is to gain a resolution to issues, which is the outcome. The third factor of variability is met, as the service will depend on the connection between the user and the organisation as well as the platform being used. Thus customer service is an affordance.

Affordance 6: Engagement - Interaction

Engagement or interaction which Hollebeek, Glynn and Brodie (2014) suggested was typically represented by an 'interactive experience' (p. 150) involves users participating with organisations. Often manifested through online behaviour such as comments, likes, shares, ratings or reviews. Argyris and Monu (2015), considered engagement as an affordance as it facilitated external interaction. As examples, they suggested video sharing sites which offered high levels of engagement. Shao (2009), and Muntinga, Moorman and Smit (2011), considered social interaction, founded on McQuail's (1983), four reasons for media use, which included comments or shares. Whilst engagement or interaction is not the feature of the object, although many social media networks have facilitated this process, it is not the outcome, which may be to socialise (Whiting and Williams, 2013), have conversations (Argyris and Monu, 2015) or participate in co-creation (Krishen *et al*., 2016). Engagement or social interaction alters, depending on many factors, therefore this meets the criterion as an affordance. When reviewing the definitions of social media in Chapter

Two, interaction was more frequently used as a term for engagement, thus this will be renamed as interaction.

Affordance 7: Entertainment

Founded in mass communication, entertainment has been confirmed by several scholars as an essential use and gratification of social media (see for example: Shao, 2009; Whiting and Williams, 2013). Research by Luchman, Bergstrom and Krulikowski (2014), suggested that some social media networks offered greater entertainment than others, providing YouTube as an example. This meets the threshold criteria as it is not a feature of the object and is not an outcome but can lead to outcomes, such as laughing or relaxing. The types of entertainment vary from those which have greater and lesser interactivity and vividness, thus entertainment is an affordance.

Affordance 8: Information (availability)

Argyris and Monu (2015), discussed the function of social media networks to enable online content to be available and searchable at any time. This concerned information in one platform that could be shared on another. Other scholars (Shao, 2009; Muntinga, Moorman and Smit, 2011; Whiting and Williams, 2013), considered information being available 24/7 in a world of ubiquitous computing. Thus information, which is neither a feature nor an outcome and has variability, is an affordance.

Affordance 9: Market and product research

Rolland and Parmentier (2014) and Weinberg *et al.* (2013) provided examples of firms gathering insights and feedback from customers, as research material, to inform future strategies. However, research was not a primary feature of social media, nor the outcome. Additionally, the types and scale of research online vary, therefore this meets the threshold criteria, as an affordance.

Affordance 10: Monitorability / surveillance (recordability)

Monitorability was described by Argyris and Monu (2015), as the 'capacity to easily observe audiences' reactions' (p. 151), whereas recordability involved storing the conversations. These have been merged as most systems that facilitate forms of monitoring automatically enable recording for future reflection, although this is neither a feature of the object nor an outcome – that may be to learn from the conversations or employ the data in some other way. Methods of achieving monitorability and recordability vary and therefore this meets the threshold criteria as an affordance.

Affordance 11: New product development

Similar to market and product research, new product development via social media has been recognised and Rathore, Ilavarasan and Dwivedi (2016) recommended that whilst social media should not replace traditional product research, product features could be divined from social media mining. New product development is neither a feature nor an outcome as the data informs future decisions. It is variable and as Rathore, Ilavarasan and Dwivedi (2016. p. 14) stated 'social media mining techniques are still evolving', thus this is an affordance.

Affordance 12: Remuneration (offers)

Muntinga, Moorman and Smit (2011), suggested that remuneration was a motivator in belonging to online communities, with opportunities to gain offers, rewards, prizes, incentives or job-related benefits. Applying the threshold criteria demonstrated that remuneration is not a feature of social media networks; although LinkedIn has steered towards recruitment, this was not the original feature. Remuneration offers variability for organisations enabling competitions or other incentives to lead to separate outcomes, thus this is an affordance.

Affordance 13: Sales cycle - Reviews

Saboo, Kumar and Ramani (2016) explored social media within the sales process and how positive reviews could generate new customers. Although a valid aspect of the sales cycle, the concept of testimonies and reviews has more frequently been considered as part of online consumption (Muntinga, Moorman and Smit, 2011), or brand research (Weinberg *et al*., 2013). Reviews within the sales cycle is an affordance, meeting the threshold criteria as it is not a feature of the object and is not an outcome but a step towards the overall process, with variation depending on organisations and platforms. Thus reviews within the sales cycle is an affordance.

3.4.12 Affordances theory, limitations, refinement and testing

Whilst within the domain of ecological psychology there was much discussion and debate surrounding the notion of affordances (Michaels, 2000; Chemero, 2003). In some works concerning social media this has been interpreted using Gibson's (1979), original notion of 'opportunities for action' (boyd, 2010), as McVeigh-Schultz and Baym (2015, p. 2), suggested that affordances were popular 'within the Communication and Information Science fields'. However, Gibson's fundamental proposition has evolved to more widely apply affordances in these domains to embrace many concepts, thus as the core attributes of the theory of affordances have been variously described, they have been mis-understood and have become abstracted as functional features of the technology (Nagy and Neff, 2015; Evans *et al.*, 2017). Part of the rationale for this can be seen in work by Heft (2007), who identified actions within the functional characteristics of the environment, whereby these characteristics are transposed into technology as features.

Thus the construct of affordances lacks clarity which has been acknowledged by several scholars (McGrenere and Ho, 2000; Markus and Silver, 2008; Parchoma, 2014; Nagy and Neff, 2015; Evans *et al.*, 2017), and is perceived as having many meanings (Bucher and Helmond, 2018). However, the obscurity is not surprising with scholars taking opposing views in their own work, such as

Gaver (1991, p. 79), who considered affordances as 'fundamental objects of perception', yet contradicted this notion by claiming that affordances were equally were independent of perception. Furthermore, Norman (1998), admitted that his own definition lacked clarity and subsequently revised – or perhaps refined (following discussions with Gibson) – his initial phraseology and stated that 'there can be both real and perceived affordances' (Norman, 1999, p. 39).

This lack of clarity is compounded as affordances have been variously described as: niche – occupying a specific place based on social construction and agency (Gibson, 1979), false - they do not exist (Gaver, 1991); hidden - lacking materiality (Gaver, 1991), nested – they are dependent on other elements that are grouped or layered (Gaver, 1991; McGrenere and Ho, 2000; McVeigh-Schultz and Baym, 2015), perceptible - demonstrating materiality and affected by agency and social construction founded on the presence or absence of perceptible information (Gaver, 1991), imagined – similar to perceptible and combined with the expected affordance which is linked to materiality (Nagy and Neff, 2015), vernacular – where the actors are involved with sense-making to gain the affordance (McVeigh-Schultz and Baym, 2015), and constrained – where not all affordances are the same (Hutchby, 2001).

Associated with the lack of lucid articulation around the terminology is a further weakness surrounding the lack of a coherent theory of affordances. Several scholars have attempted to progress the theory (McGrenere and Ho, 2000; Michaels, 2000; Chemero, 2003; Evans *et al.*, 2017), yet many simply utilise Gibson's original concept.

Thus whilst more work is required to better explicate the theory of affordances, this chapter has sought to further refine this construct by synthesising the core attributes: (i) The agency and user's actions, (ii) The objects and its features or materiality, (iii) The context or features of the environment, space, niche, and (iv) The relationship between agency, objects and the context resulting in interaction. This could be further refined in future research.

Additionally, within a pragmatist epistemology, the criteria for affordances as suggested by Evans *et al.* (2017), has been extended to have greater relevance to an organisation context. The fourth criteria may require further testing at a later stage.

Furthermore, as the threshold criteria for affordances (Evans *et al.*, 2017), has been applied to the extant critical benefits of social media for organisations, this has led to the identification of 13 affordances of social media for organisations: brand management, communication, community development, customer segmentation, customer service, interaction (engagement), entertainment, information, market and product research, monitorability / surveillance, new product development, remuneration (offers), and sales cycle (testimonies and reviews).

The literature review has shown that organisations use social media for a range of purposes, many of which were the intended properties for action such as collaboration, connections and adding content. Whilst these may be ordinary or commonplace actions, this study is interested in the different application of social media within organisations and having included or excluded affordances, following a pragmatist epistemology, this offers a useful frame for marketing managers. Furthermore, a mixed-methods approach, using pragmatism, seeks warranted assertions 'to produce pragmatic/workable "solutions" for valued ends' (Johnson and Gray, 2010, p. 90). Hence, this frame of the accepted social media affordances for organisations, will be utilised to further explore this situation and to better understand the differences and affordances. Thus, the presence or absence of these social media affordances within organisations will be tested in Research Phase One, the online survey and those which are found as being applied by organisations, will be further explored in Research Phase Two, the semi-structured interviews.

This section has shown that affordances theory has been used in several domains (Norman, 1988; McGrenere and Ho, 2000; Hutchby, 2001; Klang and Nolin, 2011; Pols, 2012; Cabiddu, de Carlo and Piccoli, 2014; Argyris and Monu, 2015), and follows a Gestalt approach which is both recognised and has been applied in marketing theory (Hackley, 2013) and hence this is a pertinent theory within the domain of marketing.

To conclude, the theory of affordances - as opportunities for action - is a good fit with this study, as this mirrors the epistemology of pragmatism which seeks actionable results, which have been termed ‘practical bearings’ (Peirce, 1878, Lecture II; 1905, p. 171), and furthermore fits within marketing management, offering practical guidance (Möller, Pels and Saren, 2013), and being an ‘applied management field’ (Hackley, 2009a, p. 12).

3.5 Challenges with social media for organisations

There are also challenges for organisations in managing social media. Pletikosa Cvijikj, Dubach Spiegler and Michahelles (2013), identified issues: (i) lack of understanding of the communication medium; (ii) lack of social media strategies; and (iii) lack of methods for effectiveness evaluation. However, these fundamental issues - comprehension, strategy and appraisal - could be applied to other business disciplines, outside social media and beyond marketing.

Valos *et al.* (2015), provided a more detailed frame to identify social media implementation challenges. They suggested six specific challenges: (i) lack of control; (ii) culture; (iii) coordination (cross-functional and external); (iv) strategic role clarity; (v) performance measurement; and (vi) marketing information systems. However, these issues are equally not unique to social media implementation as they resemble typical aspects of new technology adoption (Queiroz Miranda *et al.*, 2016).

Each of the challenges with social media for organisations is explored in this section.

3.5.1 Control

The move from communication, brand presence and product development being directed by the company to being controlled or contributed-to by the consumer, has been recognised as a 'socio-cultural shift' (Bacile, Ye and Swilley, 2014). The lack of control by organisations has a direct impact on brand management, which has become more complex in an online environment as users may provide negative public feedback or parody brand created content (Muñiz, Jr. and Schau, 2007; Gensler *et al*., 2013). Furthermore, mass communication previously centred around one-way or company control, but social media removes this power as Tredinnick astutely noted over a decade ago 'control is being gradually ceded to users' (2006, p. 229).

Another dimension regarding control is that as the boundaries between professional and personal use can become blurred (Pereira *et al.*, 2015; Van Zoonen, Verhoeven and Vliegenthart, 2016), as social media affords the opportunity for staff as well as customers to complain in a public sphere (Kaplan and Haenlein, 2010; Kietzmann *et al.*, 2011), which can result in significant damage to the organisation, as noted by Kietzmann *et al.* (2011), and Gregoire, Salle and Tripp (2015), who stated that the employee voice can result in organisations losing control as complaints may spread and result in public crises.

3.5.2 Culture

Korsten, Lesser and Cortada (2013, p. 23), distinguished a specific stage within the transformation towards 'social business' as a requirement to 'fuse the external company brand with the internal corporate culture to create a consistent customer experience at all touch points'. This resonated with recommendations that an agile approach that embraced change was required (Quinton, 2013; Valos *et al.*, 2015), especially with internal brand management, as there have been examples of employees being 'Facebook fired' (Miles and Mangold, 2014; Schmidt and O'Connor, 2015) for contributing personal comments about their organisations online. This concern regarding inappropriate use of social media and the workplace has generated guidelines across many sectors for employee use of social media, to ensure that organisations comply with the law as well as providing good practice for staff (Butell, 2011; Scheinman, 2013; Johnston, 2014; O'Connor, Schmidt and Drouin, 2015; Johnstone, 2016).

3.5.3 Coordination

Coordination is a recurring theme within social media (SM) management and implementation. This traversed the concept of culture as Valos *et al.* (2015) noted that employees may require 'guidelines for employees providing commentary on SM' (p. 6) although their over-arching concerns are connected to inter-departmental coordination as well as external coordination. In this context, coordination may be termed integration, which is an issue that will be explored further in this chapter.

3.5.4 Strategic role clarity

The notion of the strategic use of social media has been addressed by some scholars, largely providing a framework without specific guidelines. Felix, Rauschnabel and Hinsch (2017), conducted in-depth interviews with seven European social media marketing experts, succeeded by an online qualitative survey with 43 respondents and developed a framework: (i) social media marketing scope (how social media is used); (ii) social media marketing culture (traditional or modern); (iii) social media marketing structure (roles and responsibilities); and (iv) social media marketing governance (rules and guidelines). However, this construct is a set of definitions of the behaviours of those working in organisations and their approaches to social media. Whilst this is named a strategic framework, it contributes to the understanding of those involved in the processes, rather than the application required.

Pletikosa Cvijikj, Dubach Spiegler and Michahelles (2013), identified a lack of strategies and Valos *et al.* (2015), noted the same challenge as a lack of clear application in the use of social media for the organisation. The risk of a lack of strategy is additionally observed by Ogbuji and Papazafeiropoulou (2016), as a clear barrier to implementation.

3.5.5 Performance measurement

Valos *et al.* (2015) considered that there were issues with performance management for both implementing social media and measuring the ongoing performance. As an example, they incorrectly suggested that there were no metrics to measure Facebook likes, although many researchers have explored this area. For example, Lipsman *et al.* (2012), conducted research to understand the value of a 'fan' using a commercial social media measurement platform (comScore Social Essentials[9]), which assessed the value of a 'fan' in three ways: (i) increasing the depth of engagement and loyalty among fans; (ii) generating incremental purchase behaviour; and (iii) leveraging the ability to influence friends of fans. Subsequently, Paniagua and Sapena (2014), positively demonstrated the value of Twitter followers in relation to share prices.

Whilst Valos *et al*. (2015), erroneously suggested that there are no performance measurement tools, this depends on the specific objective. The addition of hypertext markup language (HTML) code into Facebook pages and website pages, can track the activity and actions of fans across a social media journey. However, this is not without flaws as duplication can occur (Pletikosa-Cvijikj, Dubach Spiegler and Michahelles, 2013), users may use and share different devices at different times, thus erroneous data can be generated. Additionally, the evolution of advertising formats across social media, includes options such as 'cost per action' which means that a sale from a specific Facebook post can be accurately recorded and tracked, weeks or months after the event. In partnership with comScore, the UK Online Measurement Company, UKOM,

[9] comScore Inc. is a cross-platform measurement company that measures audiences, brands and consumer behaviour. comScore Social Essentials measured numbers of fans and friends reached with different post types, demographics, online behaviour and brand engagement

(UKOM, 2016) provides a UK industry standard for online audience measurement, based on a newer version of comScore Social Essentials which 'uses a combination of metered panel and website, app and video tag data, commonly known as a 'hybrid' approach' (UKOM, 2017).

Outside of UKOM, within the Facebook ecosystem it is possible to gain performance measures within Facebook's own freely-available 'Insights' system on aspects of user behaviour. This currently includes, but is not limited to, the number of likes (total, new, unlikes), engaged users, reach (total, organic, paid) and people talking about this. Other researchers have explored the value of likes within social media networks (see for example Lipsman *et al.*, 2012; Mochon *et al.*, 2017). Thus whilst challenges surround performance measurement, many factors can be resolved with greater understanding.

3.5.6 Marketing information systems

As a counterbalance to where all activity can be tracked and where users share insights, this produces significantly larger volumes of information, which may be difficult to manage (Mount and Garcia Martinez, 2014; He *et al.*, 2015). Unsurprisingly, social media marketing information systems have grown significantly (Al-Qurishi *et al.*, 2015), as organisations seek to manage the plethora of data available.

Whilst information systems are available, monitoring brand and product mentions via social media can be complex (Zhang and Vos, 2014), and significant resources are required to establish and maintain a social media presence (Mills and Plangger, 2015; Saboo, Kumar and Ramani, 2016). Therefore challenges with social media implementation for organisations involve lack of control, a culture which can result in staff dismissal for inappropriate content, the integration of social media into business processes, lack of strategy and lack of understanding of the metrics. In addition to this, Duane and O'Reilly (2016) identified other dominant problems with social media management as lack of resources (time, budget, staff).

Having considered affordances and different challenges within social media for organisations, the issue is whether there are constructs or advice for the application of social media for organisations. There are many guidelines for social media policies (O'Connor, Schmidt and Drouin, 2015), and for aspects of marketing activities, although there is less research regarding the application of social media in organisational contexts (Durkin, 2013), and this is considered in the next section.

3.6 Guidelines for organisational application of social media

Having reflected upon the affordances of social media, as well as the challenges, this section sought guidelines for the implementation of social media.

Acceptance of social media within businesses has been addressed at a strategic level by several authors. Baird and Parasnis (2011) considered the move from 'social media to social customer relationship management' (p. 30) and as an older article in this domain, urged businesses to recognise 'social media as a game changer' (p. 36). Whilst others developed the theme of social customer relationship management (see for example Hennig-Thurau *et al.*, 2010; Malthouse, Haenlein and Skiera, 2013), Baird and Parasnis (2011, p. 36) created specific six management guidelines for social media adoption:

(1) Recognise social media is a game changer.
(2) Be clear on the differences between social media and other channels.
(3) Make the customer experience seamless – across social media and other channels.
(4) Start thinking like a customer.
(5) If you aren't sure what customers value, ask them.
(6) Monetise social media, if that's what customers want.

In reviewing the research concerning social media guidelines, social media frameworks, social media models and social media constructs, eight core themes were identified which are: vision; research; resources; customer focus; integration; management; measurement; and income generation. The guidelines and selected sources are highlighted in Table 3.8 and are subsequently discussed in more detail in this section.

Table 3.8 Strategic social media guidelines

SOURCES	GUIDELINES	VISION	RESEARCH	RESOURCES	CUSTOMER FOCUS	INTEGRATION	MANAGE	MEASURE	INCOME
Kaplan and Haenlein (2010)	Guidelines about using media and guidelines about being social.	✓				✓	✓		
Baird and Parasnis (2011)	Recommendations for a successful social media program to reinvent customer relationships.				✓	✓			✓
Kiron *et al.* (2012)	How to begin (or accelerate) your social journey.	✓	✓	✓				✓	
Werder, Helms and Slinger (2014)	Social media strategy framework.	✓	✓	✓	✓		✓	✓	✓
Vásquez and Escamilla (2014)	Best practices in the use of social media in SMEs.	✓		✓					
Kiráľová and Pavlíčeka (2015)	Success factors of (the destination´s) social media campaign.	✓	✓	✓					
Mills and Plangger (2015)	Strategic process for customer relationship building and maintenance on social media.		✓	✓	✓		✓	✓	
Felix, Rauschnabel and Hinsch (2015)	Social media marketing framework.	✓			✓				
Valos *et al.* (2015)	Implementation of social media.	✓		✓		✓			
Chung *et al.* (2017)	Stages of growth model for social media presence.	✓	✓	✓	✓	✓	✓		✓

Vision

The careful selection of social media networks with a purpose and a strong vision for the role of social media within the organisation was recommended by most scholars and Kaplan and Haenlein (2010, p. 65) in their five points about media, provided a weak recommendation concerned with social media selection, that businesses should 'choose carefully' - on the basis that 'There are dozens - if not hundreds - of Social Media applications'.

Although Kaplan and Haenlein (2010) gave little direction on how businesses should 'choose', this brief proposal is reverberated in Kiron *et al*.'s (2012), 'Start with a Long-Term Vision' (p. 17), whereas Werder, Helms and Slinger (2014, p. 5), provided a lengthy discourse surrounding social media and business objectives. Kiráľová and Pavlíčeka (2015, p. 363), whose domain is tourism, recommended 'clear identification of goals based on analysis' and whereas Valos *et al*. (2015, p. 24) did not explicitly mention vision; instead they recommended that managers should 'define their organisational roles and purposes'.

Research

The notion of building an evidence base and conducting prior research, before embarking on a social media strategy, is shared amongst several researchers. As an example, online brand listening, to understand issues about the brand, is a specific area to be considered (Kiron *et al*., 2012; Mills and Plangger, 2015), to capture information about the organisation, its customers and the wider market (Kiron *et al.*, 2012; Mills and Plangger, 2015).

Resources

Assigning resources (people and budget) to implement and manage social media was proposed by several scholars (Kiron *et al.*, 2012; Mills and Plangger, 2015; Valos *et al.*, 2015). Chung *et al.* (2017), commented that providing the staff with no training could diminish the benefit of social media, therefore human resources should be carefully deployed with the appropriate skills. Skills as a concept was discussed in Chapter Two under the auspices of digital literacy and there may be an argument for social media literacy within organisations to reduce the possibilities of erroneous actions.

Customer focus

Baird and Parasnis (2011), proposed a new strategy called ‘social customer relationship management’ as they recognised that customers were congregating online which is why organisations are interested. However, without a strong customer focus, the relationship may not be successful. Mills and Plangger (2015), warranted that customers were a key aspect of social media guidelines and recommended that the first step in any social media strategy should be identifying the target customer.

Integration

Coordination was noted earlier and reflects the focus on integration. Valos *et al*. (2015, p. 26), explicitly stated that social media ‘need to be integrated across all the organisational activities’. Although the concept of integrating or coordinating social media into existing elements of organisations is not widely considered by all. Killian and McManus (2015), centred one aspect of their research around the notion of integration, which they postulated had not been addressed in the literature and identified four cross platform integration strategies: (i) consistency, (ii) customisation; (iii) commitment; and (iv) caution.

Integration is acknowledged by other scholars recommending synthesis within other channels and activities (Kaplan and Haenlein, 2010; Baird and Parasnis, 2011). From a different perspective Duane and O’Reilly (2016), and their later collaboration with Chung *et al.* (2017) recognised integration, although suggested that this was part of a maturity model, when an organisation had formalised its social media processes and progressed towards consolidation and integration.

Manage

Unsurprisingly in a set of guidelines for social media, managing the process is recommended at various levels by different authors. Some provided strategic guidance such as the management team should arrange social media throughout the organisation (Chung *et al.*, 2017), and the management team must be cognisant as to why customers are connecting with their brand online. Others supplied tactical recommendations on the management of online content (Killian and McManus, 2015), social media interaction (Mills and Plangger, 2015) and managers should establish communication objectives for the stakeholders (Felix, Rauschnabel and Hinsch, 2017).

Measure

All aspects of digital marketing, especially social media, offer access to metrics enabling firms to see the results of their activities, yet only two of the researchers in this group advocated the notion of measuring results (Kiron *et al.*, 2012; Mills and Plangger, 2015). This may be as fewer managers understand the available metrics within social media which will be explored in the research phase.

Income

Baird and Parasnis (2011) identified income generation via social media and recommended monetisation, if appropriate to customers. Chung *et al.* (2017) directly commended the possibility of income generation via social media, or attribution of value.

3.7 Organisational maturity

One factor which may influence managers' ability to implement social media, as well as manage the challenges raised and affordances gained, is the level of social media adoption which could be described as organisational maturity.

The guidelines reviewed in this section for the application of social media have largely failed to address the issue of organisational maturity. However, working within the domain of information systems Duane and Reilly (2016), sought to develop a stages of growth (SoG) model in the adoption of social media, to identify levels of social media activity within organisations.

The SoG model is akin to a maturity model recognised in the domains of information systems (Gibson and Nolan, 1974; Chan and Swatman, 2004), performance measurement (see for example: Bititci *et al.*, 2015; Tarhan, Turetken and Reijers, 2016), e-business adoption (Earl, 2000), and partially applied to social media (Duane and O'Reilly, 2016). Chaffey (2010), investigated the maturity of digital-marketing governance, although this focused on organisations' operational management of digital marketing. More broadly, Morais, Pires and Gonçalves (2012), examined e-business maturity via a postal survey which took place in 2007 and concluded, unsurprisingly, that e-business systems were required. Table 3.9 illustrates the SoG model.

Table 3.9 Stages of growth in social media business presence (SMBP) implementation and management

STAGE	STRATEGY	FOCUS	STRUCTURE	MANAGEMENT
1. Experimentation and Learning	It is experimental with every department doing their own thing.	Announcing launch of SMBP, posting a number of comments, images and videos, and providing some product/service information.	Individual or departmental drive.	None or very Little involvement.
2. Rapid Growth	It is coordinated across all departments by management and a number of goals and objectives have been established.	Consumer-centric focus. Efforts aimed at increasing internal and external awareness. Customers encouraged to connect, follow, like, recommend, and comment, on products / services.	Bottom-up widespread user participation coupled with top-down management.	Support and Encourage.
3. Formalisation	It is formalised and controlled across the company, with a strategy aligned with the business plan. Staff adhere to an established set of rules.	Planning, strategy, governance, and alignment with overall business strategy.	A more centralised corporate driven model to coordinate efforts.	Controlled by management.
4. Consolidation and Integration	It is very well integrated with key business processes across the company, and it is driving a fundamental change in how we do business.	Optimisation of processes and creating scale. Fundamental business change. Pursue alignment with external partners/suppliers. Co-creation / ideation, crowdsourcing emerge.	Extension of corporate model to integrate external partners, suppliers, customers, communities, experts, etc. Micro-outsourcing of activities may also occur.	Shared by management / staff.
5. Institutional Absorption	It is embedded into the core of what we do, and how we do it, from customers to suppliers, from internal partners to external partners.	De-facto application for key business tasks. Enterprise-wide social media technologies for the entire workforce. Generate new/ reengineer existing business models.	Aimed at customers, suppliers and partners, as business connectivity is transformed to establish wider business relationships.	Shared by management / staff or decentralised.

Source: Duane and Reilly (2016, p. 82).

This is a helpful structure to show the maturity phases with key aspects to each stage, such as strategy development and management involvement. Whilst this model does not provide strategic guidance for the application or management of social media, it illustrated the typical stages of growth as being from: (i) experimentation and learning; (ii) rapid growth; (iii) formalisation; (iv) consolidation and integration description; to (v) institutional absorption. Within each stage there are descriptors based on benchmark variables which were tested through a survey instrument offered to a business community, combined with interviews and assessment of online presence.

Table 3.10 shows the social media guidelines identified in the previous section, as applied to the SoG model. This demonstrates that all elements of the social media guidelines were discussed, except income generation. This may be as the SoG model was focused on social media adoption rather than sales from social media.

Table 3.10 Social media guidelines applied to the stages of growth model

Social media guidelines	**STAGES OF GROWTH** **1. Experimentation and Learning**	**2. Rapid Growth**	**3. Formalisation**	**4. Consolidation and Integration**	**5. Institutional Absorption**
Vision			Formal strategy in place		
Research			Planning aligned to business strategy		
Resources		Management supports and encourage	Controlled by management	Shared by management and staff	Shared or decentralised
Customer Focus		Consumer centric focus			
Integration				Optimisation of processes	
Manage	Individual management	Top-down and user management	Centralised management	Integrated with stakeholders	Transformed with wide connectivity
Measure	Measurement is recognised as a gap requiring further research				
Income	Income generation not discussed				

Source: Adapted from Duane and Reilly (2016).

Therefore this section has identified the following strategic social media guidelines: vision, research, resources, customer focus, integration, manage, measure, and income. However, the guidelines reviewed in this section for the application of social media have largely failed to address the issue of organisational maturity. However, the combination of social media guidelines and the SoG model offer areas to be investigated in the research phase.

3.8 Chapter conclusions

The contribution of this chapter has been to extricate the critical factors for organisations using the lens of affordances. This has built on the earlier work of Argyris and Monu (2015), and thirteen critical factors have been distilled to be explored further within an organisational context: brand management, communication, community development, customer segmentation, customer service, engagement, entertainment, information, market and product research, monitorability / surveillance, new product development, remuneration (offers) and sales cycle (reviews).

A further contribution of this chapter has been to simplify the process of defining affordances through the development of a decision tree to meet affordances criteria. This can be used to assess new or emerging affordances.

Moreover, a review of the social media guidelines, as applied to the Stages of Growth (SoG) model, have contributed other components which may facilitate or impede social media application: vision, research, resources, customer focus, integration, manage, measure, and income.

The contribution of this chapter is three-fold: firstly to assemble social media benefits, termed as affordances, for organisations, which could be utilised in future research; secondly to build on extant theories of affordances and offer a new decision tree to enable straightforward identification of affordances; and thirdly to provide a question frame for Research Phase One.

PART 3: PRIMARY RESEARCH

Chapter Four: Methodology

4.1 Chapter introduction

This chapter discusses and explores research philosophies in marketing in more detail. The chosen research strategy – Classical Pragmatism is explained, defined and evaluated. The application of pragmatism in this study is further explicated, followed by a discussion on the mixed-methods research approach, the strategy and evaluation criteria.

This chapter concludes by considering validity in mixed-methods, illustrating strategies to mitigate any threats. This chapter contributes to the thesis as it explains the approach taken to gather the research data.

The literature review did not offer a conclusive approach to either the research philosophy or the research methods. Some researchers adopted a positivist stance (Lorenzo-Romero, Alarcon-del-Amo and Constantinides, 2012; Labrecque *et al.*, 2013; Krishen *et al.*, 2016; Bulut and Dogan, 2017); others approached their studies from an interpretivist viewpoint (Kozinets, 1999; Brandtzæg, 2010; Muntinga, Moorman and Smit, 2011; Whiting and Williams, 2013; Vieru *et al.*, 2015; Vuori and Jussila, 2016); and the remainder chose to mix their methods (Eshet-Alkalai, 2004; Baird and Parasnis, 2011; Ng, 2012; Luchman, Bergstrom and Krulikowski, 2014; Argyris and Monu, 2015; Hamilton, Kaltcheva and Rohm, 2016a). Thus, this did not provide a definitive or recommended procedure for the research phase.

This chapter will therefore expand upon research philosophies considered in marketing and will subsequently discuss the pragmatist research philosophy that was adopted and the research design.

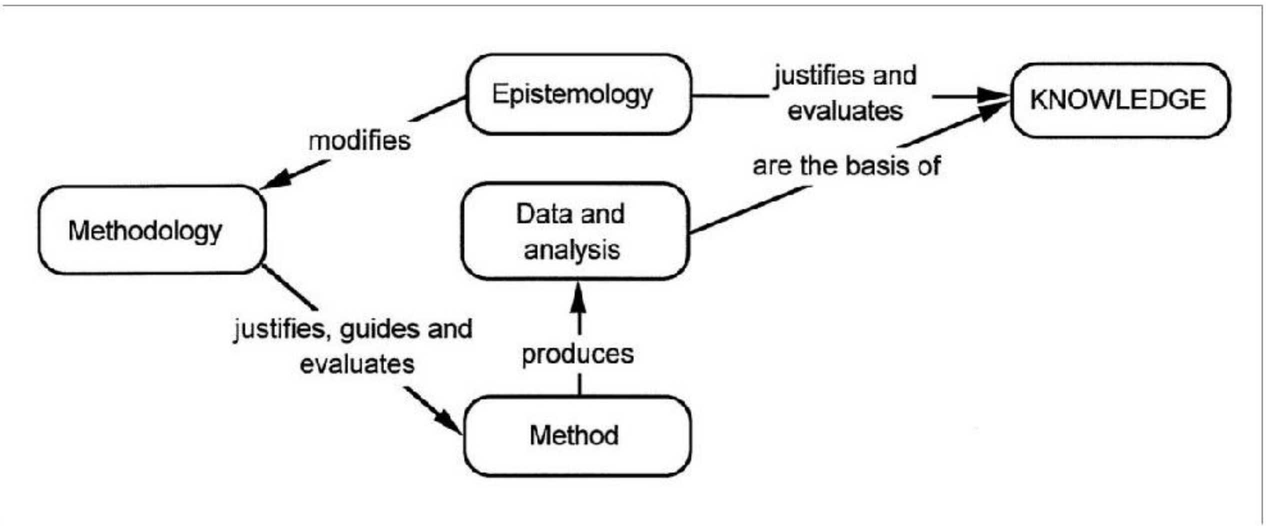
4.2 Research philosophies

There is complex language, inconsistency and duplication which encircle research philosophies.

The research philosophy used in a study explains the beliefs and views held by the researcher. This often commences with views of reality which are encapsulated within the study of being, which in social sciences is represented by ontology (Bryman and Bell, 2011). Ontology has two axes: one is adopted by those who believe that there is direct access to the real world while the other sees no single reality, but a reality that is based on the individual's view. Ontology can be applied to selected theories of knowledge, wrapped around a framework or methodology.

If ontology is the study of existence or what is, epistemology is the study of what it means to know, or what knowledge is or adopting the literal translation from the Greek, 'knowledge discussion' (Crotty, 1998; Mortari, 2015; Saunders *et al.*, 2016). Therefore the epistemology adapts or influences the methodology and justifies the knowledge, whilst the methodology underpins and assesses the method, as illustrated in Figure 4.1.

Figure 4.1 The simple relationship between epistemology, methodology, and method



Source: Carter and Little (2007, p. 1317).

Nevertheless within these philosophies there are a plethora of possibilities. However, two principal perspectives exist in research into organisations and businesses; positivism and interpretivism (Swanson, 2005; Easterby-Smith, Thorpe and Jackson, 2008; Bryman and Bell, 2011).

Opposing views of positivism and interpretivism, quantitative and qualitative research have been discussed by several scholars for some time (Carson et al., 2001; Creswell and Plano Clark, 2010, 2018; Bryman and Bell, 2011) and thus the elements contained in these paradigms, are shown in Table 4.1 which presents the fundamental differences between positivism and interpretivism. These dichotomous stances are intended to affirm the researcher's principle orientation to the role of theory.

Table 4.1 Fundamental differences between positivism and interpretivism

PARADIGM	POSITIVISM	INTERPRETIVISM
Ontological orientation	Objectivism	Constructionism

PARADIGM	POSITIVISM	INTERPRETIVISM
Social reality	One true reality with direct access to the real world	No single external reality as it is considered as a constantly changing and emergent property from individuals' creation
Epistemology	Scientific method, observable and measurable facts	Focus on narratives, perceptions and understandings
Research approach and principle orientation to the role of theory in relation to research	Deductive and quantitative methods	Inductive and qualitative methods
Role of theory	Seeks to test theory and often commences with a theoretical framework	Seeks to generate and develop theory based on the data collected
Techniques used by the researcher	Primarily formalised statistical and mathematical methods	Primarily non-quantitative, such as hermeneutics, phenomenology
Axiology	Value-free, unbiased as researchers use checks to eliminate bias	Value-bound, biased as researchers are part of the process
Data collection	Collection of data for numerical appreciation	Collection of data for linguistic appreciation
Process	Linear process	Emergent process from which themes are developed.

Sources: Adapted from Carson et al. (2001); Creswell and Clark (2010, 2018); Bryman and Bell (2011).

The next section will discuss these differing views further.

4.2.1 Positivism – ontological and epistemological considerations

Stemming from natural sciences, a positivist ontology espouses a scientific approach where the intention is to explain based on observation. Founded on direct access to the real world, this philosophy requires absolute truth and clearly identified findings, with no middle ground. According to Saunders *et al.* (2016, p. 135), positivism provides 'unambiguous and accurate knowledge'. Data exist to test hypotheses, from which generalisations can be made and knowledge produced.

The epistemological focus of positivism is deductive with an objective, value-free, unbiased approach to the data. In a positivist frame, the data collection is for numerical assessment, rather than subjective interpretation and is approached following a sequential mechanism to deliver deductive proof.

This deductive approach is often favoured by those undertaking quantitative research and has been depicted as a consecutive process, although this may not always be the case. Additionally, assuming the question design is appropriate for the audience, this provides standardised checks and measures to ensure that any potential bias is minimised so as not to contaminate the results.

This is an unequivocal view of a research philosophy and could be considered, for the newer researcher, as a logical epistemological option where knowledge is constituted by means of gathering numerical data. Yet there are confounding views and whilst the term positivism is recognised, it is not always appreciated and is perceived by some researchers as a pejorative expression (Bryman, 1992).

4.2.2 Interpretivism – ontological and epistemological considerations

The other view, interpretivism, opposes positivism and represents an ontology with no single reality but rather one which is ‘constantly changing and emergent property from individuals’ creation’ (Bryman and Bell, 2011, p. 27), thus the researchers create the meaning and it is socially constructed with multiple meanings depending on the context. The epistemology is based on an understanding through perceived knowledge, where meaning is derived from a subjectivist stance.

As with positivism, there is diversity within the styles of interpretivism and Saunders *et al*. (2016, p. 140) suggested three prominent branches of interpretivism which included ‘hermeneutics, phenomenology and symbolic interactionism’. Other scholars further incorporated realism and naturalistic enquiry as part of the core approaches of interpretivism (Lincoln and Guba, 1985; Gray, 2014). Regardless of the selected option, this alternative approach is inductive and is favoured by those conducting qualitative research, as once data collection has been completed, themes are explored to formulate a hypothesis and develop theory.

The rationale for adopting this qualitative approach is that critical components of the investigation are language and meaning, as with interpretivism, data is collected for linguistic or cultural appreciation where the theory is an emergent process from which themes are developed to provide understanding. For the newer researcher, this raises questions such as whether or not the research would be valid and indeed accepted when the data collection was finalised.

However whilst positivism and interpretivism are recognised as the two primary research philosophies in the wider domain of business and management, this chapter will expand upon other research philosophies that are employed within the field of marketing.

4.2.3 Research philosophies in marketing

In the field of marketing a range of perspectives have been widely debated, employed and recommended, part of the dilemma or 'contretemps' (Tadajewski, 2006), that has been acknowledged within the study that concerns the polar alternatives of marketing as either an art or a science.

According to marketing scholars, this debate revolves around two approaches, the first of which embraces a scientific approach and has been pejoratively referred to (Biesta, 2010) as positivist, empirical or imperialistic, and it has been widely used in the domain of marketing (Peter and Olson, 1983; Bagozzi, 1984; Hunt, 1990). This approach views a single objective reality where truth is warranted via numbers and quantifiable measures (Bryman and Bell, 2011). There have been debates in marketing about the dominance of positivism for decades (Arndt, 1985; Hunt, 2014) and whether this is a benefit or a hindrance to marketing. A bibliometrics study of articles published in the Journal of Strategic Marketing from 1993 to 2017 illustrated that over 62 per cent were based on a quantitative approach (Brown *et al.*, 2017) which, whilst as a single journal is not definitive, indicated that this may be favoured in a marketing context.

The second contrasting view, is the interpretivist stance which has been used by marketing scholars in many forms (Belk, Sherry, Jr. and Wallendorf, 1988; Hackley, 2003; Brown, 2015), which has been considered as inferior as it is perceived as lacking scientific rigour (Cassell *et al*., 2006). Interpretivism considers the ability to understand the world in which we live through social construction, where meaning is derived from artefacts which can be evidenced by means of rich descriptions, rather than numerical data.

These diametrically opposing views often circumnavigate the construct as to whether marketing is, or is not, a science (Peter and Olson, 1983). Whilst aspects of marketing may indeed be scientific and can be quantified as such, the weaknesses of a positivist approach are that it offers explanation without a nuanced understanding and thus the 'implications for action may not be obvious' (Easterby-Smith, Thorpe and Jackson, 2008, p. 73). However, this dichotomy has major conflict at its roots (Oakley, 2000), to such an extent that this generated 'crisis literature' in the 1980s, questioning the place of marketing. This is a discussion that has endured since the '19th and early years of the 20th centuries' (Anderson, 1986, p. 155) and has continued (Bartels, 1951; Buzzell, 1963; Hunt, 1976, 1978, 1990; Brown, 1996; Saren, 2016), yet to date, the argument has failed to generate a resolution and has thus been deemed as unhelpful (Anderson, 1983).

Whilst epistemology seeks to ascertain what is and is not acceptable knowledge within a domain (Bryman and Bell, 2011; Saunders *et al.*, 2016), the quest for truth and genuine knowledge in marketing, combined with the avoidance of falsity or non-genuine knowledge (Hunt, 1990), has been, as stated by Arndt (1985, p. 11) dominated by 'the logical empiricist paradigm' which is founded in Humean scepticism and the values espoused by the German-speaking scientists that formed the Vienna Circle (Hunt, 1991). This logical positivism sought empirical verification or falsification, via observable elements, to deliver the proving or disproving of a hypothesis, to have meaning. There has, however, been misrepresentation concerning logical positivism which has questioned its fundamental meaning (Hunt, 1991). Whilst the logical empiricist, positivist and realist phrases may appear interchangeable and similar, according to Hunt (2015), both logical empiricism and scientific realism agree that science 'makes progress' (p. 244), these constructs differ in areas including the application of formal logic and in the semantic treatment of 'theoretical terms' (p. 245).

Nevertheless, in spite of these differences and the debates within marketing, Hunt (1990), positioned scientific realism as the apposite paradigm in the field of marketing, on the basis that it reflected extant research within the domain, which he supported as this philosophy ‘makes sense of science’ (p. 13). Nevertheless, this adherence to a specific philosophy, has been described by Mingers (2006, p. 13), as the process of adopting an imperialistic argument because this ‘is the correct way to generate knowledge’. Hunt and Hansen (2013, p. 111), further claimed that ‘Marketing scholars often face a quandary when searching for a philosophical foundation to ground their research’. However, this is unsurprising as Hunt (1990) listed fifteen forms of realism (classic, constructive, convergent, critical, direct, evolutionary naturalism, fallibilistic, inductive, methodological, motivational, naïve, ontic, referential, scientific, and transcendental) which he subsequently grouped together in one cluster as ‘scientific realism’ (p. 8), although the variations of scientific realism were later acknowledged as a challenge (Hunt, 1991). This indicated that regardless of the nuanced approaches within this philosophy, they all belonged to one overarching perspective. Furthermore, although Hunt (1990), commended scientific realism as a relevant philosophy in the field of marketing, he simultaneously confounded the situation by adding that there was ‘no ’grand theory’ of science according to realism’. Thus demonstrating some deficiencies of realism as a philosophical standpoint.

Yet, within the domain of marketing, realism has been positioned as ‘the victor’ (Easton, 2002, p. 104) and has thus appeared to dominate the field, to the exclusion of other philosophies.

Moving from the wider construct of scientific realism to one version of realism, the notion of critical realism, which was further developed by Bhaskar and Sayer (Bhaskar, 1989; Collier, 1994; Sayer, 2000, 2010), is a type of scientific realism (Chernoff, 2007) and whilst ‘closely related’ (Nash, 2005, p. 186), there are differences. Sayer (2010, p. 5) described critical realism through eight characteristics which are subsequently illustrated and discussed.

(1) The world exists independently of our knowledge of it.
(2) Our knowledge of the world is fallible and theory-laden.
(3) Knowledge develops neither wholly continuously, as the steady accumulation of facts within a stable conceptual framework, nor discontinuously, through simultaneous and universal changes in concepts.
(4) There is necessity in the world; objects — whether natural or social — necessarily have particular powers or ways of acting and particular susceptibilities.
(5) The world is differentiated and stratified, consisting not only of events, but objects, including structures, which have powers and liabilities capable of generating events.
(6) Social phenomena such as actions, texts, and institutions are concept-dependent.
(7) Science or the production of any kind of knowledge is a social practice.
(8) Social science must be critical of its object. In order to be able to explain and understand social phenomena, we have to evaluate them critically.

Some of these characteristics resonated with both positivism and scientific realism and thus did not represent a change in direction. Sayer's description of critical realism addressed the Popperian construct of falsification (Popper, 1959), and the role of theory, which are both present in critical realism, as is the requirement of scientific method in collecting facts or data. Hunt (2005), reiterated the notion that social science should evaluate objects critically. However some characteristics indicated differences from critical realism, which started with the notion of necessity.

Commending critical realism as a philosophy within the domain of marketing, the characteristic of necessity is discussed by Easton (2002), who recognised the need for relationships in marketing between one party and another. This element of necessity, is, according to Sayer (2000, p. 13), ‘One of the most distinctive features of realism is its analysis of causation’. Causality in critical realism, is, as explained by Sayer (2010, pp. 104-105), ‘the ‘causal powers’ or ‘liabilities’ of objects and their ways-of-acting’. Thus critical realists consider how the causal powers affect certain events. Although this stance around the nature of causality led to confusion within scientific realism which was rejected by positivists as an ‘unobservable, metaphysical, concept’ (Hunt, 1991, p. 34) yet embraced by critical realism.

This study is concerned with social media marketing in organisations to develop a framework for social media application and thus critical realism is not a good fit for this study, as it is not seeking to uncover causality, but to understand and consider the affordances derived from social media for organisations and why they exist, rather than why they were caused (Danermark *et al.*, 2002). Furthermore, the focus of the study is the application and use of social media which is a value-driven axiology driven by the researcher’s beliefs as a practitioner.

Whilst Sayer (2010), illustrated the core aspects of critical realism, Bhaskar (1989, p. 3), positioned critical realism (he named this transcendental realism) as ‘a set of perspectives on society’ and added that it was not ‘a set of practical policies’, thus failing to provide guidance on its application in a practical situation and thus less apposite to a study concerning application in an organisational setting (Ormerod, 2006). Further arguments against critical realism include an automatic assumption that critical realism is required (Hammersley, 2009), without foundation. Additionally there is political focus (Bhaskar, 1989), underlying critical realism which may be less relevant in commercial organisational research (Brown, 2014).

Consequently Table 4.1 has been extended to incorporate the additional philosophies considered in marketing, that is critical realism and pragmatism, illustrating the fundamental differences between these approaches, shown in Table 4.2.

Table 4.2 Fundamental differences between positivism, interpretivism, critical realism and pragmatism

PARADIGM	POSITIVISM	INTERPRETIVISM	CRITICAL REALISM	PRAGMATISM
Definition	'The philosophical stance of the natural scientist and entails working with an observable social reality to produce law-like generalisations' (Saunders *et al.*, 2016, p. 135)	'A strategy is required that respects the differences between people and the objects of the natural sciences and therefore requires the social scientist to grasp the subject meaning of social action' (Bryman and Bell, 2011, p. 17)	'Realism is the theory that the ultimate objects of scientific inquiry exist and act … quite independently of scientists and their activity' (Bhaskar, 1989, p. 12)	'Pragmatism is a theory of the nature of ideas and truth... it is a theory about reality' (Dewey, 1908, p. 85)
Ontological orientation	Objectivism	Constructionism	Stratified in three layers; empirical, actual and real	Complex, rich, external
Social reality	One true reality with direct access to the real world	No single external reality as it is considered as a constantly changing and emergent property from individuals' creation	External and independent reality but multiple interpretations	Reality is the practical consequences of ideas

PARADIGM	POSITIVISM	INTERPRETIVISM	CRITICAL REALISM	PRAGMATISM
Epistemology	Truth uncovered via scientific method, observable and measurable facts	Truth gained from meanings in narratives, perceptions and understandings	Alethic truth that recognises fallibility	Truth derived from practical meaning within the context, focus on problem solving
Role of theory	Seeks to test theory and often commences with a theoretical framework	Seeks to generate and develop theory based on the data collected	Reflects upon meta-theory	Theories are instruments of thought and action
Research approach and principle orientation to the role of theory in relation to research	Deductive and quantitative methods	Inductive and qualitative methods	Retroductive, analysis of existing structures and range of methods	Follows research questions and uses range of methods, emphasis on practical outcomes
Axiology	Value-free, unbiased as researchers use checks to eliminate bias	Value-bound, biased as researchers are part of the process	Value-laden, researcher bias acknowledged and attempts made to minimise	Value-driven, study initiated by researcher’s beliefs
Techniques used by the researcher	Primarily formalised statistical and mathematical methods	Primarily non-quantitative, such as hermeneutics, phenomenology	Causal-explanatory	Mixed-methods
Data collection	Collection of data for numerical appreciation	Collection of data for linguistic appreciation	Collection of data for numerical and linguistic appreciation	Collection of data for numerical and linguistic appreciation
Process	Linear process	Emergent process from which themes are developed	Uncovering causality	Mixed processes to find solutions

PARADIGM	POSITIVISM	INTERPRETIVISM	CRITICAL REALISM	PRAGMATISM
Researcher's relationship to the study	Objective role in collecting and interpreting data	Researcher has a participative role in the study	Emphasis is on the relationships throughout; belief that total objectivity is not possible	Can follow codes of objectivity and / or subjectivity depending on the context.

Sources: Adapted from James, 1907; Dewey, 1908; Bhaskar, 1989; Carson et al., 2001; Swanson, 2005; Tashakkori and Teddlie, 2010; Bryman and Bell, 2011; Saunders et al., 2016; Shannon-Baker, 2016; Creswell and Plano Clark, 2018.

However, notwithstanding the merits or limitations of critical realism, there are realist and non-realist stances within the field of marketing. Nevertheless, not all have been accepted and one such example of a philosophy used in marketing studies includes critical relativism (Anderson, 1986), which posited the lack of a singular 'scientific method' (Anderson, 1986, p. 156) although this philosophy was condemned as lacking credibility and filled with contradictions, as marketing was positioned as scientific endeavour, 'We, as scientists, do not need to embrace a critical relativists' perspective' (Cooper, 1987, p. 127). This viewpoint was supported by other marketing scholars who equally censured the construct of critical relativism (Hunt, 1990; Hunt and Hansen, 2013).

Although he failed to concede other potential alternatives to realism as possible marketing philosophies, Hunt (1991, p. 38), suggested in the interests of 'fairness' that different standpoints should be recognised and therefore he cited the opening lines from Frost's poem 'mending the wall' in what appeared to be a rapprochement, thus repeating earlier calls for pluralism (Lutz, 1989), which submits that values should be expanded beyond positivism to incorporate 'socially constructed' methodologies (Hirschman, 1986, p. 237).

The notion of methodological pluralism is similarly found in work by O'Shaughnessy (2013), who recommended that 'The choice of method will relate to the questions being asked' (O'Shaughnessy, 2013, p. 184). Moreover, Hunt (1990), advised that not all researchers should adopt the philosophy of scientific realism, partly from a concern of developing a hegemonic position and partly from a pragmatic approach as research needs to meet the requirements of the study.

Whereas it has been argued that critical realism is recognised in extant marketing literature and could thus be considered as a mainstream philosophy for marketing (Hunt, 1990), it seeks to uncover causal powers, rather than present solutions, whereas pragmatism follows the research questions and uses a range of methods, with a particular emphasis on practical outcomes. According to Rorty (1999, p. xxvi), the basis of pragmatic research is that it delivers 'utility' or as Shannon-Baker (2016, p. 325), stated, 'pragmatism focuses on what things will make a difference'. This study seeks to make a difference to organisations with the development of a social media application framework, and thus its focus is utility, which centres around a pragmatist epistemology, to provide 'better action in context' (Davies, 2015, p. 217). Furthermore, the applied emphasis of pragmatism has been recommended in areas of marketing, such as consumer research with regards to 'policy, engagement and impact' (Silcock, 2015, p. 213).

Therefore, the domain of marketing does not possess prescriptive or nomothetic methods (O'Shaughnessy, 2013), and as noted by Hackley (2007, p. 4), these different methods share a common purpose as 'everybody is looking for findings'. Thus, this study pays attention to advice from recognised scholars (Hunt, 1990; O'Shaughnessy, 2013) and therefore seeks an alternative paradigm in order to meet the questions posed in this study, and thus pragmatism is regarded as the pertinent stance.

The next section will subsequently discuss the pragmatist research philosophy that was adopted in this study.

4.3 Chosen research strategy – Classical Pragmatism

The debates surrounding these epistemologies and the lack of a prescriptive epistemology in marketing lead the researcher towards an alternative theoretical standpoint. Traversing these opposing stances is another choice - pragmatism - which 'sees ways through the polarised quantitative-qualitative debate to find practical solutions to the problem of differing ideologies and methodologies' (Grbich, 2013, p. 27). Whilst this could be considered as a less complicated route through the melange and mire of methodological choices as it 'acknowledges the plurality of knowledges' (Cornish and Gillespie, 2009, p. 7), its focus is to find a problem and provide a practical solution.

The next section with explicate the philosophy and definitions of pragmatism, including Dewey's model of inquiry and will illustrate the differences between the two schools of thought in this paradigm: classical pragmatism and neopragmatism.

4.3.1 Philosophy and definitions of pragmatism

The founders of pragmatism studied at well-known universities in the United States (Harvard - Peirce, James; John Hopkins – Dewey; Yale - Rorty), and also worked at many recognised institutions (Harvard – James; John Hopkins - Peirce, Princeton - Rorty), where they influenced later scholars (Ormerod, 2006). Although, as a belief, classical pragmatism is attributed to Charles Saunders Peirce (Peirce, 1905), who was dismissive of traditional metaphysics and articulated the 'inseparable connection between rational cognition and rational purpose' (Peirce, 1905, p. 163). Peirce was inspired by Immanuel Kant's work *Kritik der reinen Vernunft* (1781), which introduced the notion of a pragmatic belief (Dewey, 1916b). Building on this construct, Peirce developed pragmatism as a philosophy of meaning, taking the designation from the Greek *pragmatikos* representing deed (Peirce, 1905, p. 163).

Whilst he initially stated that ‘pragmatism is not definable’ (Peirce, 1905, p. 175), as explananda were in the domain of traditional paradigms and within pragmatism ‘action is a universal phenomenon which in itself begs no explanation but rather makes the starting point for explanations’ (Kilpinen, 2008, p. 1). However, Peirce offered descriptions and spent much time explaining its meaning (Peirce, 1878, Lecture II; 1905, p. 171), this was recognised as the pragmatic maxim:

> Consider what effects that might conceivably have practical bearings you conceive the object of your whole conception to have. Then your conception of those effects is the WHOLE of your conception of the object.

Whilst this definition introduced the notion of ‘practical bearings’ which is at the core of pragmatism, it could be considered vague as ‘what effects’ could apply in any situation and ‘whole conception’ may indicate ‘a sign, a word, a communication’ (Ormerod, 2006, p. 898). Peirce’s notion of pragmatism languished and failed to achieve immediate attention. The philosophy gained recognition though the work and publication of ‘Pragmatism: A New Name for Some Old Ways of Thinking’ by William James (James, 1907; Ormerod, 2006) who suggested pragmatism had existed since Socrates and possessed anti-intellectualist proclivities (James, 1907), thus rendering this philosophy less popular in some quarters. James referred to pragmatism in part, as the pragmatic method, which he determined as ‘Method for settling metaphysical disputes that might otherwise be interminable’ (James, 1907, Lecture II). James added that researchers should ‘try to interpret each notion by tracing its respective practice consequences’ (James, 1907, Lecture II) and that the pragmatic method was an ’attitude of orientation’ which he outlined as (James, 1907, Lecture II):

> The attitude of looking away from first things, principles, 'categories', supposed necessities; and of looking towards last things, fruits, consequences, facts.

In describing the behaviour of a pragmatist, James suggested courage was needed as this meant those adopting pragmatism as a method (James, 1907, Lecture II) would thus:

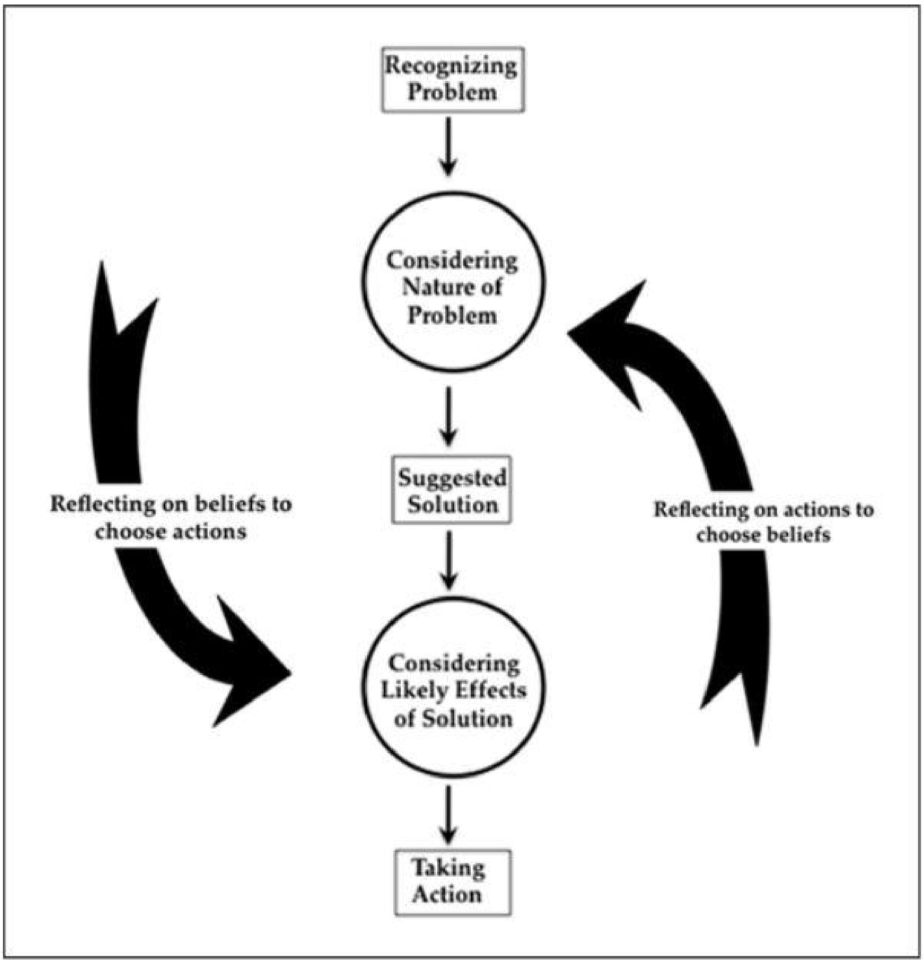
> Turn(s) away from abstractions and insufficiency, from verbal solutions, from bad *a priori* reasons, from fixed principles, closed systems, and pretended absolutes and origins. He turns towards concreteness and adequacy, towards facts, towards action and towards power.

Thus Peirce and James recognised pragmatism as an alternative paradigm to the traditional ontologies of positivism / objectivism and interpretivism / constructionism. Although for James, truth was found in 'useful ideas' (Ormerod, 2006, p. 899), and thus the notion of application was firmly rooted with pragmatism. Subsequently, the philosophy was acknowledged and extended as a systematic form of pragmatism by Dewey (1916a), who applied the construct to education and politics.

With his focus considering more closely the experience of the researcher, Dewey suggested that ‘Pragmatism believes that in knowledge as a fact, an accomplished matter, things are ‘representative of one another’ (Dewey, 1905, pp. 325-326). This was termed instrumentalism by Dewey (1905), although it is recognised as classical pragmatism. Dewey was concerned with the sources of beliefs and meanings of actions. He stated that the origins of the beliefs were based on prior actions, or habits (Kilpinen, 2008; Morgan, 2014) which were acquired from previous experiences and the outcomes of actions were found in these beliefs. Dewey further affirmed that experiences always occurred within a specific context which may be historically or culturally dependent. Thus as experiences involve interpretation and always occur in a specific context, as a dependent factor, this therefore introduced the potential for erroneous or fallible predictions (Morgan, 2014, p. 2).

According to extant research (see for example: Brown, 2012; Morgan, 2014), Dewey’s model of inquiry as a basis for research, commences with problem recognition, with an issue requiring investigation. This develops as the nature of the problem is defined, based on further investigation. The third step is to consider possible solutions and the impact of these solutions. The model concludes when action is taken and Figure 4.2 illustrates Dewey’s model of inquiry according to Morgan (2014, p. 4).

Figure 4.2 Dewey's model of inquiry



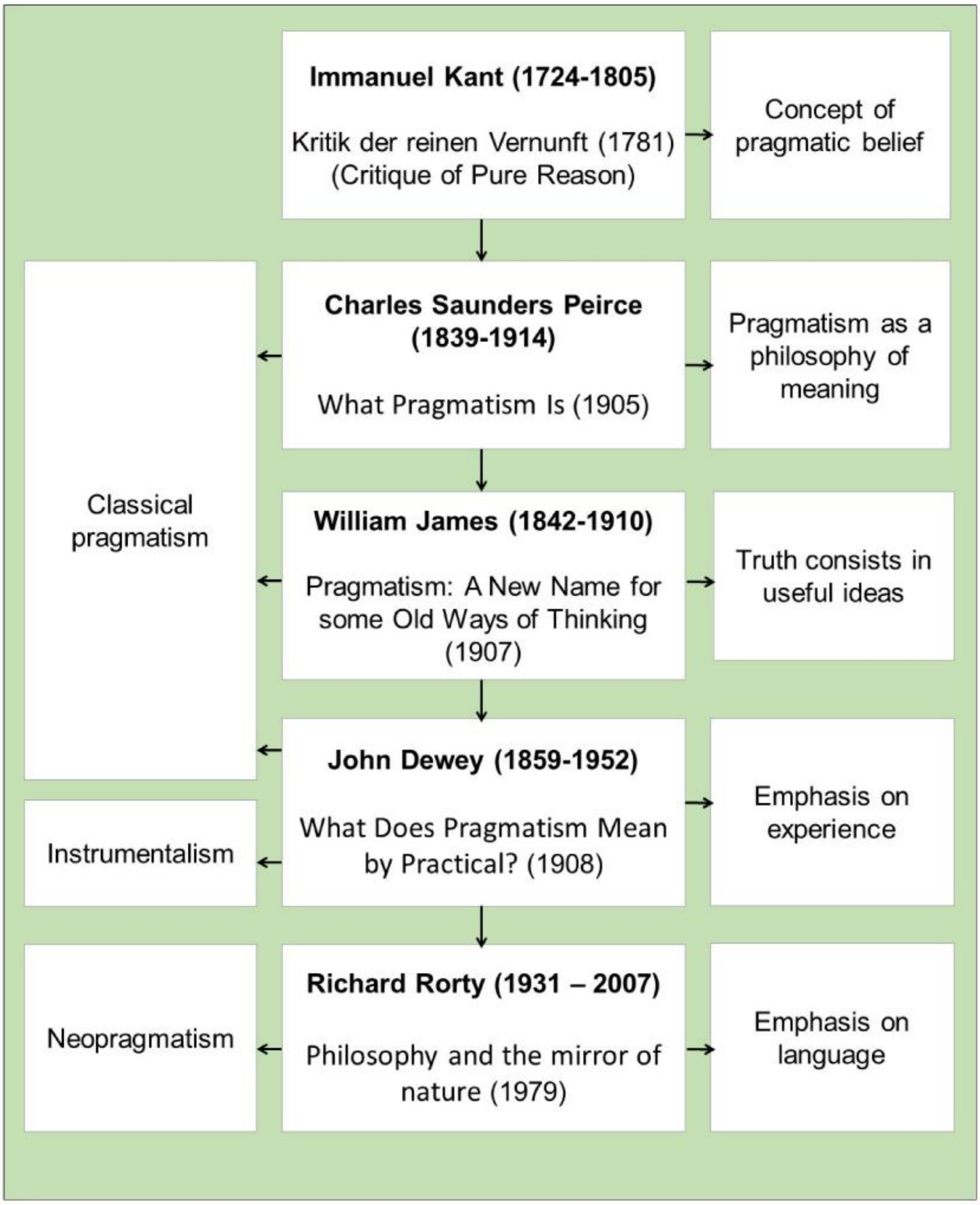
Source: Morgan (2014, p. 4).

Thus Dewey's model of inquiry moves back and forth between different stages where reflection is harnessed, thus providing a useful model for mixed-methods research where one study informs a supplementary study. Thus this is a good fit for this study.

After Peirce, James and Dewey, a new school of neopragmatism emerged, led by Richard Rorty who emphasised meaning in language, as an interpretive method (Rorty, 1982). Also referred to as linguistic pragmatism (Hildebrand, 2005), its adherents included Habermas and Putman. However, it should be acknowledged that neopragmatism is more often used in semiotics and other areas of linguistics, which is outside the scope of this study.

Figure 4.3 provides a summary of the development of pragmatism that highlights key factors from each philosopher and serves to explicate that pragmatism is long-established philosophy.

Figure 4.3 Summary of the development of pragmatism



Whilst pragmatism has evolved as a philosophy or indeed as a method, with classical and neopragmatism remaining as the recognised paradigms, Hildebrand (2005) distinguished the elements between these two schools of thought, based around classical pragmatism from the later perspective of Dewey and neopragmatism as described by Rorty, and this is shown in Figure 4.4.

Figure 4.4 Central Differences between Classical Pragmatism and Neopragmatism

Issue	Classical Pragmatism (Dewey)	Neopragmatism (Rorty)
Reality is radically external to us; complete and determinate; mind independent	No	No
Knowledge must embody fixed and certain standards; universal scope and certainty	No	No
Values and principles are immovable and eternal; while applied in daily life, their ground is neither conventional nor constructed	No	No
Warrant or justification of a proposition depends on verification…	... by experience or satisfaction of conditions initiating problem	… by conversation that leads to linguistic devices that seem better
Language is a tool used in experience, including the inquiries made by philosophers	Yes	No. Nothing beyond language can be appealed to in a philosophical argument. To grant this is to take the linguistic turn.
Inquiry or scientific method	Have specific phases that can be described and adapted for use in various arenas.	No specific pattern of inquiry or method is discoverable. Coping is serendipitous; it happens in multifarious and unsystematic ways.
Philosophy should criticize fundamental beliefs and reconstruct them even as philosophical systems	Yes. Philosophical reconstructions can play a role in political and cultural renewals.	No. Philosophical systems are throwbacks and only hinder renewal. Philosophical criticism should aim at decoding and debunking; this clears the way for linguistic creativity.

Source: Hildebrand (2005, p. 347).

Within traditional paradigms the nature of inquiry focused on the nature of reality - its ontology, with the nature of the relationship between the knower and what can be known - its epistemology (Lincoln and Guba, 1994). The difference within classical pragmatism is that is considers the nature of reality with the emphasis on experience (Dewey, 1908; Ormerod, 2006; Kilpinen, 2008).
As this study developed from practitioner knowledge, seeking the experience of those in organisations, classical pragmatism is a good fit as an epistemology as the outcomes are based on contextual evidence which Dewey referred to as being able to justify or warrant assertions (Ormerod, 2006; Biesta, 2010; Hildebrand, 2014). Furthermore, a specific method will be applied, following Dewey's model of classical pragmatism where the inquiry has 'specific phases that can be described and adapted for use in various arenas' (Hildebrand, 2005, p. 347). Nevertheless, it should be acknowledged that this study does not take neopragmatism as its foundation for the reasons that this is not a study of language, and additionally neopragmatism does not follow a specific research method. Thus neopragmatism would be inappropriate and classical pragmatism is more suitable.

Having considered alternative philosophical approaches within the domain of marketing, the next section will evaluate the chosen epistemology, classical pragmatism, which will hitherto be referred to as pragmatism throughout this study.

4.3.2 Evaluation of pragmatism

There are disadvantages of pragmatism as both an epistemology and ontology. It could be considered a narrow or less-convoluted philosophy, with a focus on practicality (Morgan, 2014, p. 1), and as Dewey developed the construct it offers no access to absolute truth and thus furnishes warranted assertions where truth is derived from practical meaning and inference (Hildebrand, 2005; Ormerod, 2006; Scott and Briggs, 2009). Furthermore as the foundation of pragmatism was in the American teaching universities - which enabled the concept to gain attention - nonetheless, based on these origins, there is a political dimension where pragmatism is negatively regarded as 'the American philosophy' and was thus scorned by leading European philosophers such as Durkheim (Ormerod, 2006; Rusche and Tilman, 2007), partly due to the lack of a monist search for truth. Additionally it appeared to subscribe to 'crass materialism and naïve democracy', due to its rejection of traditional ideological paradigms. (Ormerod, 2006, p. 902).

There are further issues around its designation as pragmatism, where the term has encountered distain, and could hence be perceived as having negative connotations (Ormerod, 2006). Moreover, whilst it has been recognised that there is confusion amongst the many forms of realism (Hunt, 1990), a similar, albeit smaller dilemma faces pragmatism, which, according to Lipscomb (2011, p. 3), 'is not one thing'. In some circles, there is a lack of agreement on the main forms of pragmatism and the terminology. Some scholars suggested that there are two forms – classical and neopragmatism (Haack, 2006); others considered three – classical (Cambridge), instrumentalism, linguistic pragmatism (Ormerod, 2006). Classical pragmatism is also referred to as Cambridge pragmatism and Rorty's neopragmatism and linguistic approach is also called postmodern (Ormerod, 2006). Additionally more recent appellations have included methodological pragmatism (Maxwell and Mittapalli, 2010), and realist pragmatism (Lipscomb, 2011), although these newer designations are versions of classic pragmatism.

Other disadvantages with pragmatism are that it has been closely linked to mixed-methods research (Johnson and Onwuegbuzie, 2004; Teddlie and Tashakkori, 2012), and may thus be considered a challenge (Denzin, 2012). Indeed Johnson and Onwuegbuzie (2004), commended pragmatism as the perfect partner for mixed-methods research. Yet Denzin (2012, p. 82), disagreed that pragmatism was a methodology and suggested ‘It is a doctrine of meaning’. This contributes to the argument that pragmatism fails to fully explicate its epistemology and ontology (Lincoln, 2010).

However, notwithstanding the disadvantages of pragmatism as an epistemology and ontology, the advantages include the nature of its approach which seeks to addresses the gap between theory and praxis (Fendt, Kaminska-Labbé and Sachs, 2008; Skålén and Hackley, 2011; Möller, 2017), the adoption of a specific process for research (Morgan, 2014), its emphasis on practical outcomes that make a difference (Scott and Briggs, 2009), and additionally aspects of pragmatism such as its ‘social nature of science’ are considered modern (Ormerod, 2006, p. 905).

According to Lipscomb (2011), one reason for the renaissance in pragmatism was possibly its ability to provide a route through the endless ontological disagreements. Thus pragmatism as an epistemology and ontology is relevant today as it simultaneously seeks to ameliorate the polarised ontologies of positivism / objectivism and interpretivism / constructionism and to address the nature of human experience (Johnson and Onwuegbuzie, 2004; Hildebrand, 2005; M. J. Brown, 2012).

The nature of pragmatist inquiry is to find a problem and provide a practical solution (Johnson and Onwuegbuzie, 2004; Morgan, 2014), thus as an epistemology it is apposite for problem-solving within organisations. Additionally pragmatism supports empirical research (Ormerod, 2006), and is especially recognised as a methodology for use in mixed-methods research (Teddlie and Tashakkori, 2012; Creswell and Plano Clark, 2018) and is consequently a good fit with this study.

4.3.3 Pragmatism in this study

Whilst pragmatism was established in the American higher education system, this is evidenced in the field of marketing. One such example is the concept of the marketing mix (Borden, 1964), which followed research questions that were seeking practical outcomes where the mix was developed as a solution to a lack of specific data and thus provided applied conclusions, in the form of checklists for marketing managers. Additionally, Levitt's seminal work 'Marketing Myopia' (1975), identified business problems that required solutions. Thus pragmatism's roots in marketing theory hark back to the Marketing Management School which addressed the question 'How should organisations market their products and services?' (Jones, Shaw and McLean, 2013, p. 42), which considered the application of marketing from the organisations' (sellers') standpoint.

Furthermore, pragmatism is acknowledged and advocated in mixed-methods research (Lipscomb, 2011; Teddlie and Tashakkori, 2012; Shannon-Baker, 2016). Indeed, Shannon-Baker (2016), recommended that pragmatism was more apposite to determine practical solutions as critical realism was better suited to evaluative studies.

Additionally, undergoing a revival following further research into its philosophy and application (Feilzer, 2010; Rosiek, 2013), pragmatism has been recommended as an epistemology for application in several other domains including: education (Biesta, 2014), operational research (Ormerod, 2006), social research (Morgan, 2014), public administration (Hildebrand, 2005), information systems (Goldkuhl, 2012), medical informatics (Scott and Briggs, 2009), and science (M. J. Brown, 2012).

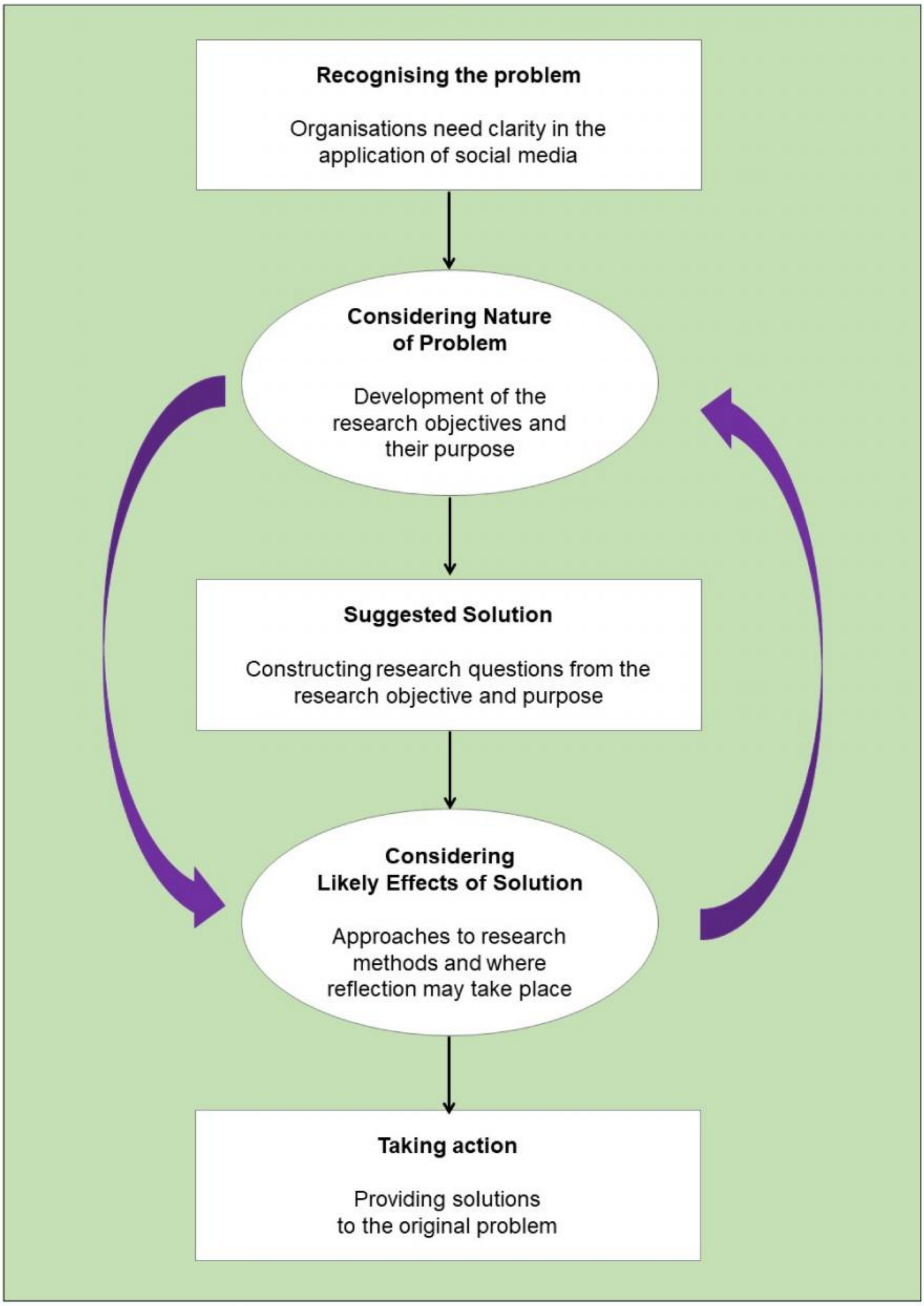
Aspects of pragmatism have been employed in areas of marketing such as; branding (Hatch, 2012), consumer research (Silcock, 2015), evaluating marketing effectiveness (Brooks and Simkin, 2012), and creating social media metrics (Peters *et al.*, 2013). Moreover, pragmatism has been recommended as an alternative marketing philosophy (S. Brown, 2012), and according to Varey (2012, p. 430), marketing should adopt a pragmatic, solution-focused approach, since 'marketing-by-objectives … can generate value'. This pragmatic approach has long been employed in marketing education and was utilised in the initial teaching of marketing at institutes such as the Harvard Business School (Jones and Tadajewski, 2015), subsequently influencing other university marketing programmes.

Furthermore, as identified in the literature review, the gap between theory and praxis has been recognised by several scholars (Lamberton and Stephen, 2016; Quinn *et al.*, 2016; Kannan and Li, 2017), as pragmatism has the element of useful application at its core, this is a good fit for this study. The rationale for this research is further supported by Hackley (2013, p. 2) who remarked that 'Marketing in practice has a social texture, in its workplace, its consumptions experiences', this recognises the essence of human experience (Ormerod, 2006; Kilpinen, 2008; Morgan, 2014), as well as the context of the study (Dewey, 1905).

The literature review further illustrated a lack of knowledge as to whether digital natives or digital immigrants are more competent in their use of social media within organisations. The gap in empirical research in this area, coupled with the conflicting perspectives, requires further investigation and will, using a pragmatist epistemology, be based on the experience of the respondents who will provide warranted assertions of their experience. This will be evaluated within the theory of affordances, which considers these experiences framed around the relationship between agency, objects and the context, resulting in interaction. Additional research gaps in the literature review related to the deficiency in research regarding the application of social media within organisational contexts (Durkin, 2013). Following a pragmatist epistemology and ontology, to discover the application of social media within organisations requires obtaining truth – or rather warranted assertions – from the respondents' experience in representing their organisations, to define the practical meaning.

According to Morgan (2014), Dewey's systematic approach involved five steps which are noted in Figure 4.5 and applied to this study. The structure starts with a problematic situation and concludes with a solution.

Figure 4.5 Dewey's systematic steps as applied to this study



Thus applying Dewey's systematic steps (Morgan, 2014, p. 3), is initiated with the recognition of a problem, which in this study, is that organisations require clarity in the application of social media within a business context.

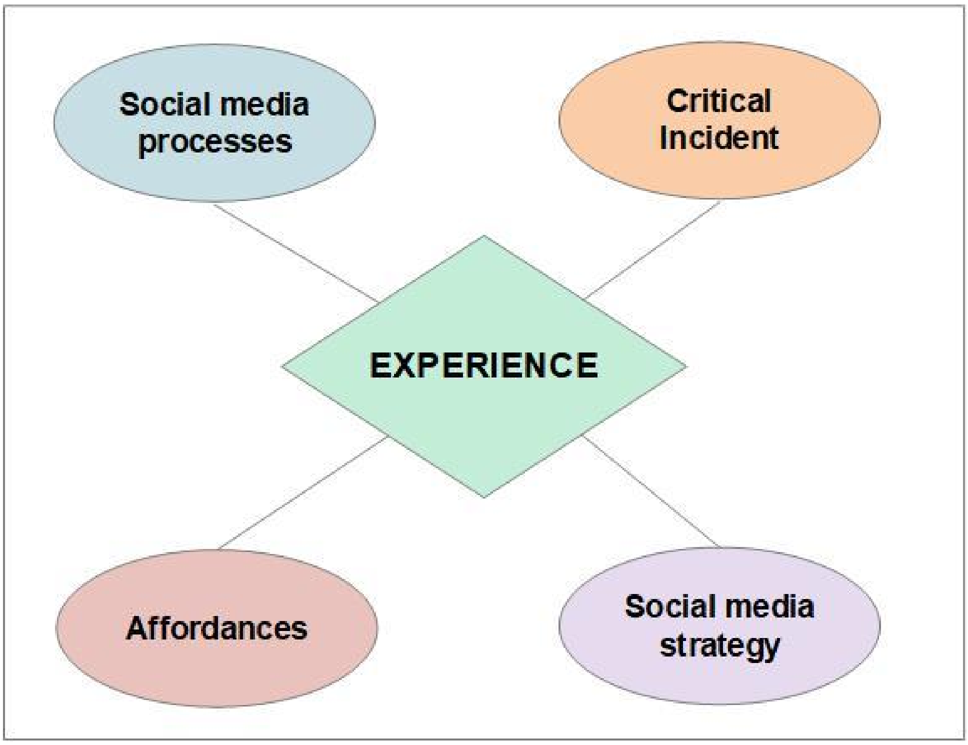
The second step requires consideration of the difference it makes to define the problem one way rather than another. This involved identifying stages within the literature review, to address both the individual and organisational contexts: (i) To review the literature on social media and social media application in organisations in order to identify critical success factors, and (ii) To conduct primary research in order to determine and evaluate current social media marketing application within organisations. Whilst the literature review found evidence of the overarching purposes and benefits of social media for individuals, one omission concerned the skills of the users. Following a pragmatist epistemology, requiring reflections on beliefs to choose actions, was identified as an area to be investigated in the empirical research. The critical factors for organisations, using the lens of affordances, provided a parsimonious method of assessing whether an item was, or was not, an affordance. Thus the affordances of social media, as well as the challenges, were identified.

However, as noted earlier in this section, there was a gap in the research concerning the application of social media, within an organisational setting. Whilst context in pragmatism is critical (Dewey, 1905), experience is a central tenet and thus this was an area to be investigated further in the empirical research.

Thus the next step, in Dewey's pragmatic process, was to develop a possible line of action as a response to the problem – the suggested solution. This encompassed constructing research questions from the research objectives and purpose. At this stage action was taken to gather empirical evidence on the usage and benefits of social media in an organisational context and to identify whether there were differences in social media application, and to explain what these differences were and why they existed. The benefits were accordingly assessed using the lens of affordances to provide clarity. As a mixed-methods approach was employed, this enabled reflective action to take place between the first and second study and therefore the second study was informed by the first, following a pragmatist epistemology.

The second study commenced with *a priori* themes focused around the experience of the individual responding on behalf of their organisation. Based on the evidence garnered in the literature review, the primary themes are illustrated in Figure 4.6, which are developed and explicated further in Research Phase Two.

Figure 4.6 Thematic map (version 1) showing primary a priori themes to be explored in Research Phase Two



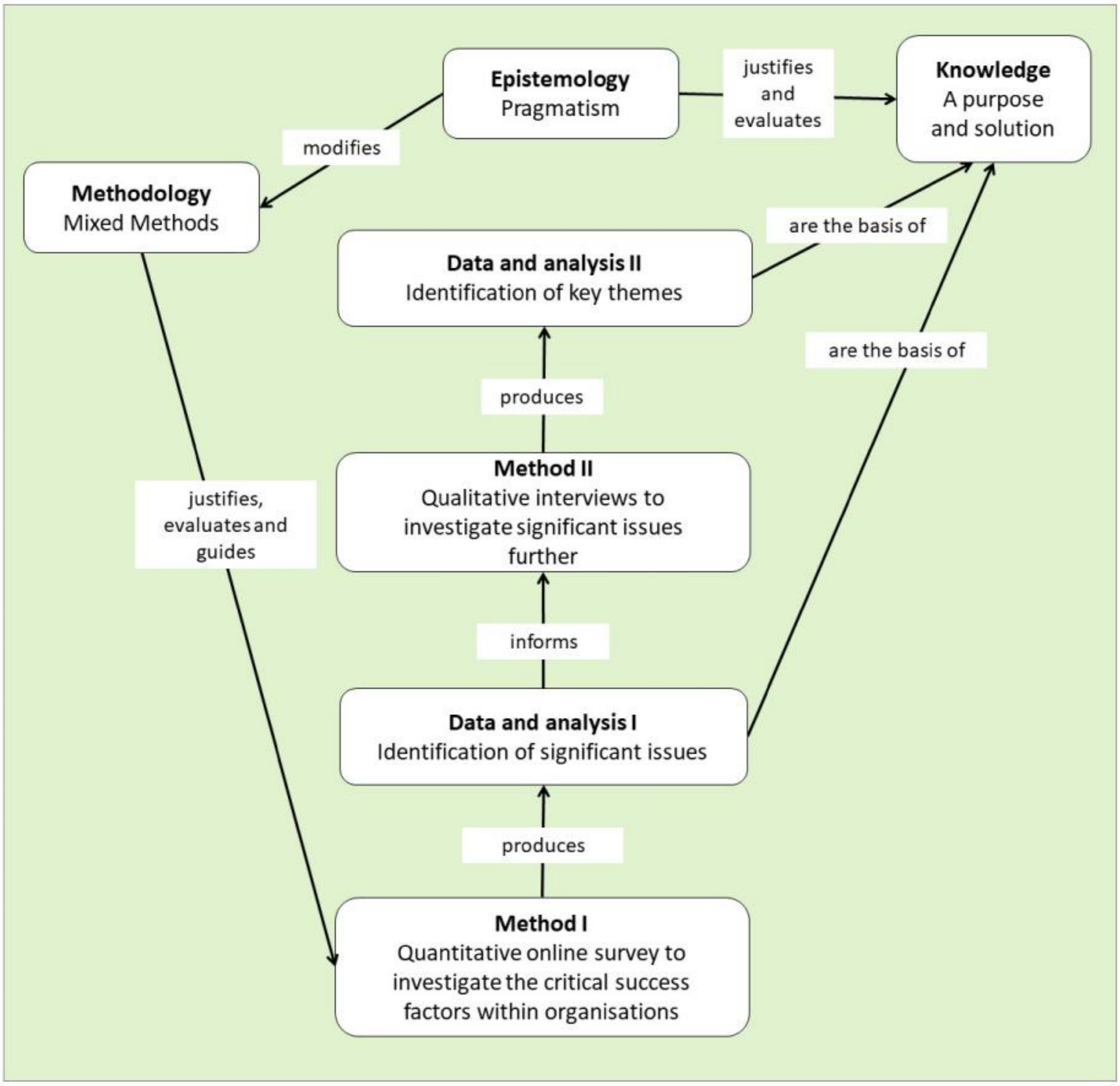
Subsequently, the fourth step required consideration of the likely effects of the solution. This comprised evaluating potential actions in terms of their likely consequences and considering approaches to research methods and where reflection may take place. Pragmatism advocates an empirical approach and thus evidence was evaluated using gaps that were identified in extant research and consequently framed around generational cohorts and the presence or absence of formal marketing qualifications.

The last stage, taking actions that are felt to be likely to address the problematic situation, necessitated providing solutions to the original problem, to provide clarity in the application of social media for organisations. This resulted in; (i) The social media affordances maturity scale; (ii) Stages towards the identification of critical factors in social media application which resulted in guidelines for best application of social media marketing in organisations; and (iii) Development of a strategic framework for social media application in organisations. Whilst these steps provide a sequenced approach that can be adapted, following a pragmatist epistemology, these actions will require further field testing at a later stage.

Thus, pragmatism is often applied where the results furnish action for organisational practice (Johnson and Onwuegbuzie, 2004; Ormerod, 2006; Morgan, 2014). As has been described in this section, founded by the American philosophers Charles Sanders Peirce, William James and John Dewey, pragmatism considers practical activity as its knowledge base.

The epistemology flows from (i) what are the sources of our beliefs; to (ii) what are the meanings of our actions (Dewey, 1908). Thus this philosophy recognises that multiple methods are appropriate for this study. Research Objective 2 is: 'To conduct primary research in order to determine and evaluate current social media marketing application within organisations', which includes understanding what and why, thus pragmatism has been recognised as a good fit with a mixed-methods approach (Johnson and Onwuegbuzie, 2004; Cameron, 2011; Creswell and Plano Clark, 2018), to address these issues. Thus Figure 4.7 illustrates the epistemology, methodology and method applicable to this study, demonstrating that the research objectives are the essence to finding a practical solution.

Figure 4.7 Epistemology, methodology, and method applied to this study



Source: Adapted from Carter and Little (2007).

In amongst the confusion, discord and diverse terminology, as well as the many choices and multi-methods, sensible advice is provided from several quarters, in so much as researchers should focus on the approach that best meets the needs of the research question (Creswell and Plano Clark, 2010; Bryman and Bell, 2011). This is a pragmatic approach which this research will assume, within a mixed-methods strategy which is subsequently explicated.

4.4 Mixed-methods research approach

Addressing the research questions requires both quantitative and qualitative approaches. This is not a dualistic positivist and interpretivist stance as the separation between quantitative and qualitative research methods is no longer straightforward. The other approach is that it can be integrated (Balnaves and Caputi, 2001; Grbich, 2013), referred to as mixed-methods, which has been defined by Johnson, Onwuegbuzie and Turner (2007, p. 123) as:

> The type of research in which a researcher or team of researchers combines elements of qualitative and quantitative research approaches (e.g., use of qualitative and quantitative viewpoints, data collection, analysis, inference techniques) for the broad purposes of breadth and depth of understanding and corroboration.

Tashakkori and Creswell (2007, p. 4) suggested that mixed-methods was:

> Research in which the investigator collects and analyzes data, integrates the findings, and draws inferences using both qualitative and quantitative approaches or methods in a single study or a program of inquiry.

The key words are combine and integrate, rather than perceiving the methods as separate entities with one qualitative study and one quantitative study. Described as the 'third methodological movement' (Tashakori and Teddlie, 2003, p. ix), there are supporters of the integrated approach. Brannen (2005), for example, argued the case for mixed-methods and explained how governments used to favour quantitative studies although they have since embraced qualitative methods. She further contended that research may require both quantitative and qualitative methods, at different stages. Denscombe (2010, p. 137) adopted a strident perspective and proposed that the mixed-method approach 'crosses the boundaries of conventional paradigms of research by deliberately combining methods from different traditions with different underlying assumptions' whereas Bryman and Bell (2011, p. 630) asserted that 'mixed-methods research has become an increasingly used and accepted approach to conducting business research.' As the locus of this research concerns organisations, mixed-methods is an appropriate research solution.

Creswell and Creswell (2005) suggested that one of the difficulties with mixed-methods research is the name as this is recognised by scholars with alternative terms including: multi-trait, multi-method, combined research or multi-strategy research (Bryman and Bell, 2011). Although at an earlier point, Tashakkori and Teddlie (2003, p. 62) disavowed this view:

> Mixed methods are differentiated from multimethod designs in which the research questions are answered by utilizing two data collection procedures (e.g. participant observation and oral histories) or two research methods (e.g. ethnography and case study), both from earlier qualitative or quantitative traditions.

To extend the inconsistency within research philosophy, Bryman (2007) described a further dichotomy: a particularistic discourse and a universalistic discourse (p. 8). The particularistic discourse suggested that methodology naturally evolves from the research question, whereas the universalistic discourse recommended mixed-methods, regardless of the question. This is a similar concept suggested by Gorard (2003, p. 3) who stated that 'whatever your choice of primary method, there is a good chance that your research should involve numbers, at least at the outset'.

Whilst some comprehend the benefits of mixed-methods evaluation, others refute the possibility of a combined epistemological and ontological approach (Sale, Lohfeld and Brazil, 2002). Somehow quantitative research is perceived as scientific with a more valid, robust and rigorous approach; marrying this to a different epistemological approach appears such a contradiction as to be impossible. This approach, which has been termed a third way, adopts a pragmatic stance and mirrors the researcher's philosophy.

4.4.1 Benefits and challenges of mixed-methods

The mixed-methods strategy minimises the weaknesses of a single approach (Creswell and Plano Clark, 2010; Makrakis and Kostoulas-Makrakis, 2016), and the notion of adopting 'multiple methodological approaches' has been recommended in the domain of marketing (Lamberton and Stephen, 2016, p. 167). Furthermore, an additional factor is that the combination of approaches provides answers to both what and why. Quantitative data can elucidate *what* has happened, qualitative research adds colour and context to provide explanations as to *why* this happened.

However, mixed-methods is not without challenges, of which the greatest are the breadth of skills required and the additional time needed to collect and analyse different data (Creswell and Plano Clark, 2010; Bryman and Bell, 2011). Further challenges are recognised by Tashakkori and Teddlie (2003, p. 4), which included (i) the nomenclature and basic definitions used in mixed-methods research; (ii) the utility of mixed-methods research; (iii) the paradigmatic foundations for mixed-methods research; (iv) design issues in mixed-methods research; (v) issues in drawing inferences in mixed-methods research; and (vi) the logistics of conducting mixed-methods research.

The nomenclature and basic definitions, along with the 'paradigmatic foundations' have been acknowledged by several researchers, as mentioned earlier. The rationale or the 'why' which is described as the 'utility' is a larger issue, along with the 'logistics' of the research and is dependent upon the research question, time and resources available and echoed the sentiment of both Creswell and Clark (2010) and Bryman and Bell (2011). Connected to this are the design issues and whether the study warrants this approach.

The last aspect concerned evaluation, which is discussed in the next section.

4.4.2 Mixed-methods evaluation criteria

Standards are required to assess the quality of mixed methods research and thus far, evaluation techniques in mixed-methods research have been constructed by several researchers (Creswell *et al.*, 2011; Creswell and Plano Clark, 2018).

Whilst the context and purposes of evaluation are applicable to all types of studies, a further benefit of a mixed-methods approach, as opposed to a mono-method, is that this involves the application of multi-methods, which in this study are firstly a quantitative study and secondly a qualitative study. According to Bryman and Bell (2011), quantitative research methods have measurable evaluation criteria. Considering qualitative research, Lincoln and Guba (1985) devised a process-focused evaluation methodology which, in the absence of specific measures, considered four criteria: credibility; transferability; dependability; and confirmability. Therefore, there are recognised measures of evaluation within both quantitative and qualitative research and these are shown in Table 4.3.

Table 4.3 Evaluation criteria for qualitative and quantitative research methods

QUANTITATIVE RESEARCH (BRYMAN AND BELL, 2011)	**QUALITATIVE RESEARCH (LINCOLN AND GUBA, 1985)**
Reliability - Whether the results are repeatable	Credibility - Whether the findings are believable
Replication - Whether the procedures can be replicated	Transferability - Whether the findings apply to other contexts

QUANTITATIVE RESEARCH (BRYMAN AND BELL, 2011)	QUALITATIVE RESEARCH (LINCOLN AND GUBA, 1985)
Validity • The conclusions must demonstrate integrity (measurement, internal, external, ecological)	Dependability • Whether the findings are likely to apply at other times Confirmability • How the investigator has managed their values

Regardless of whether quantitative, qualitative or mixed methods, research requires an evaluation criteria to ascertain its quality. However, an issue for mixed methods research, is the lack of an agreed evaluation criteria (Brown *et al*., 2015). Whilst using two methods - qualitative and qualitative – is recognised as independently providing validity for the results and according to Abowitz and Toole (2010, p. 108), within mixed-methods, 'the key is to incorporate sound methodological principles at each stage of the design process'.

Onwuegbuzie and Johnson (2006) suggested that 'validity in mixed research be termed legitimation in order to use a bilingual nomenclature that can be used by both quantitative and qualitative researchers'. They proposed nine types of legitimation: (i) sample integration; (ii) insider-outsider; (iii) weakness minimization; (iv) sequential; (v) conversion; (vi) paradigmatic mixing; (vii) commensurability; (viii) multiple validities; and (ix) political, although this does not appear to have been widely adopted. This approach appears to be positivist in nature in order to justify the validity rather than accept interpreted findings.

Creswell and Plano Clark (2018, p. 282), researchers who have focused on mixed-methods, proposed four principles to judge the quality of mixed methods research: (i) both qualitative and quantitative data is collected and analysed rigorously; (ii) there is intentional integration of the data and results; (iii) the procedures follow specific designs; and (iv) the procedures are located within theory and philosophy. Whilst these are useful as an over-arching criteria, there are two weaknesses; firstly as they are based on data analysis which is dependent upon the method and repeats earlier criteria, and secondly, these principles lack detail and may result in elements being missed.

An alternative method of evaluating mixed-methods designs was proposed by Dellinger and Leech (2007) who developed a Validation Framework, aiming to reconcile the range of options available within a mixed-methods context and to organise the required evidence. However this is a complex and unwieldy framework with eighteen separate elements that repeated different aspects of quantitative and qualitative research that had been previously identified by other researchers (Lincoln and Guba, 1985; Bryman and Bell, 2011). The elements focused on (i) design quality - which addresses reliability and credibility; (ii) legitimation - which incorporates reliability and validity; and (iii) interpretive rigor - which includes dependability and validity. Therefore, this is a complex framework which encompasses all extant methods of evaluation within qualitative and quantitative methods, and is thus less of a unifying framework and more of an assemblage of all possible evaluation processes. Therefore this is not a suitable evaluation framework for a pragmatist 'what works' epistemology as it simply replicates existing qualitative and quantitative methods of evaluation and fails to provide a unified method of evaluation.

Adopting a numerical approach, Pluye *et al.* (2009), suggested a scoring system and noted the increased use of mixed-methods in the health sector, thus focused their research in this domain. This was a move towards a set of criteria to be assessed, rather than a replication or compilation of established quantitative and qualitative evaluation methods. Table 4.4 illustrates this scoring system.

Table 4.4 A scoring system for mixed methods research and mixed studies reviews

TYPES OF MIXED METHODS STUDY COMPONENTS OR PRIMARY STUDIES IN A SYSTEMATIC MIXED STUDIES REVIEW CONTEXT	**METHODOLOGICAL QUALITY CRITERIA**
Qualitative	• Qualitative objective or question • Appropriate qualitative approach or design or method • Description of the context • Description of participants and justification of sampling • Description of qualitative data collection and analysis • Discussion of researchers' reflexivity
Quantitative experimental	• Appropriate sequence generation and/or randomization • Allocation concealment and/or blinding • Complete outcome data and/or low withdrawal/drop-out
Quantitative observational	• Appropriate sampling and sample • Justification of measurements (validity and standards) • Control of confounding variables
Mixed methods	• Justification of the mixed methods design • Combination of qualitative and quantitative data collection-analysis techniques or procedures • Integration of qualitative and quantitative data or results.

Source: Pluye et al. (2009, p. 540).

However the criteria for the scoring system for mixed methods research, is dependent upon the type of mixed-methods approach that was deployed. To provide some form of universal application the presence or absence of different items to be coded is marked (yes=1, no=0) and a 'quality score' (Pluye *et al.*, 2009, p. 539) is devised based on the percentage of items present, divided by the number of coded items. However the weakness of this approach is that as a binary system, this may not indicate the quality of work, simply that the elements were contained in the study being conducted or subsequently reviewed. Furthermore, the final number, within a single study, is isolated and in the absence of a guide to good and weak quality, there is no indication of the overall merit of the research. This approach is therefore more suited to a series of studies where the absolute score can be compared to other relevant studies.

Thus this is less suitable for a single research project and not an appropriate fit for this study.

Whilst these evaluation methods adopted numerical approaches, A different style was taken by O'Cathain, Murphy and Nicholl (2008, p. 97), who were working in a healthcare environment and advised researchers utilising mixed-methods to adopt guidelines for 'Good Reporting of A Mixed Methods Study (GRAMMS)', as illustrated in Table 4.5. This was a process-driven approach providing a set of criteria to be assessed, rather than a replication or compilation of established quantitative and qualitative evaluation methods.

Table 4.5 Good Reporting of A Mixed Methods Study (GRAMMS)

STEP	GOOD REPORTING OF A MIXED METHODS STUDY (GRAMMS) PROTOCOL
1.	Describe the justification for using a mixed-methods approach to the research question.
2.	Describe the design in terms of the purpose, priority and sequence of methods.
3.	Describe each method in terms of sampling, data collection and analysis.
4.	Describe where integration has occurred, how it has occurred and who has participated in it.
5.	Describe any limitation of one method associated with the presence of the other method.
6.	Describe any insights gained from mixing or integrating methods.

Source: Adapted from O'Cathain, Murphy and Nicholl (2008).

Thus, in in the absence of universally agreed criteria for mixed-methods evaluation, the Good Reporting of A Mixed Methods Study (GRAMMS) protocol demonstrates adherence to a process, which provides the possibility for greater evaluation. Moreover, within a pragmatist epistemology, knowledge starts with a problematic situation and concludes with a solution. According to Morgan (2014), Dewey's systematic approach involved a sequence and the GRAMMS protocol follows a similar approach and thus is a good fit for this study.

Therefore Table 4.6 shows Good Reporting of A Mixed Methods Study (GRAMMS) steps and their location in this study.

Table 4.6 Good Reporting of A Mixed Methods Study (GRAMMS) and location in this study

STEP	GOOD REPORTING OF A MIXED METHODS STUDY (GRAMMS) PROTOCOL	LOCATION IN THIS STUDY
1.	Describe the justification for using a mixed-methods approach to the research question.	Chapter Four: Methodology
2.	Describe the design in terms of the purpose, priority and sequence of methods.	Chapter Four: Methodology
3.	Describe each method in terms of sampling, data collection and analysis.	Chapter Five: Research Phases Chapter Six: Research Phase One – Quantitative Online Survey Findings Chapter Seven: Research Phase Two Qualitative Semi-Structured Interview Findings
4.	Describe where integration has occurred, how it has occurred and who has participated in it.	Chapter Four: Methodology Chapter Five: Research Phases
5.	Describe any limitation of one method associated with the presence of the other method.	Chapter Nine: Conclusions, Implications and Reflections
6.	Describe any insights gained from mixing or integrating methods.	Chapter Eight: Discussion

Source: Adapted from O'Cathain, Murphy and Nicholl (2008).

Furthermore, the GRAMMS guidance is recognised as practical (Cameron, Sankaran and Scales, 2015), and thus is a good fit with a pragmatist philosophy.

Finally, it should be noted that steps five and six in the GRAMMS approach have been reversed. The insights will be provided first, followed by the limitations as this better matches the study reporting format and this is further discussed in Chapter Eight.

The research design will thus utilise the recommended GRAMMS protocol (O'Cathain, Murphy and Nicholl, 2008). This section will address steps (1) Describe the justification for using a mixed-methods approach to the research question; (2) Describe the design in terms of the purpose, priority and sequence of methods; and (4) Describe where integration has occurred, how it has occurred and who has participated in it. Step (3) the description of each method in terms of sampling, data collection and analysis, is outlined in this chapter and addressed in detail in Chapter Five Research Phases, Chapter Six Research Phase one - Online Survey Findings, and Chapter Seven Research Phase two - Qualitative Interview Findings.

4.4.3 Justification for mixed-methods selection

Johnson, Onwuegbuzie and Turner (2007, p. 112) suggested that mixed-methods research is the 'third major research approach' and they equally described its position as 'workable middle solutions' (p. 113) and discussed different reasons provided by earlier researchers for the use of this research paradigm. These are synthesised and shown in Table 4.7.

Table 4.7 Reasons and rationale to combine quantitative and qualitative research

Year	Source	REASONS AND RATIONALE FOR MIXED METHODS Confirm findings	Elaborate or enhance the data	Provide richness	Identify areas to explore further
1985	Rossman and Wilson	✓	✓	✓	✓
1989	Greene, Caracelli and Graham	✓	✓	✓	✓
1995	Sechrest and Sidani	✓		✓	
2006	Collins, Onwuegbuzie and Sutton	✓	✓	✓	

Source: Adapted from Johnson, Onwuegbuzie and Turner (2007).

The researchers identified in Table 4.7 agreed that confirmation of findings, whether through corroboration, triangulation, verification or treatment integrity was an essential element within mixed-methods research. They further concurred that mixed-methods provided a richness and detail to the meaning of the results. Most agreed that it could enhance the data and researchers (Rossman and Wilson, 1985; Greene, Caracelli and Graham, 1989), have suggested that mixed-methods could additionally identify areas for further research, although this is not unique to mixed-methods.

The aim of the primary research is to determine and evaluate current social media marketing application within organisations. This necessitates gathering data to assess social media marketing application and whether there are differences based on generational cohort or skills. In this study the skills are assessed using the presence or absence of recognised formal marketing qualifications. This will explain the differences but may not illuminate why they exist and thus integration of the different data sets is required to enrich, clarify, extend, probe, enhance and understand the findings. Research Phase One provided the framework for Research Phase Two, thus using one method to inform the other. Therefore this is the rationale to integrate the quantitative and qualitative research.

4.4.4 Purpose, priority and sequence of methods

The epistemological approach is pragmatism and the research methodology mixed-methods. The next issue to determine is the purpose, priority and sequence.

The purpose of using mixed-methods in this study is to gather different types of data to add richness and to understand whether there are differences in social media application based on generational cohort or formal marketing qualifications and identify the significant differences. However, there are varying options in the priority and sequence of mixed-methods that have been raised by Creswell and Plano-Clark (2010) and Bryman and Bell (2011), which are discussed in this section.

Creswell and Plano Clark (2007, p. 59) stated that the 'four major types of mixed-methods designs are the Triangulation Design, the Embedded Design, the Explanatory Design, and the Exploratory Design'. However the chosen mixed-methods design should reflect the research objectives.

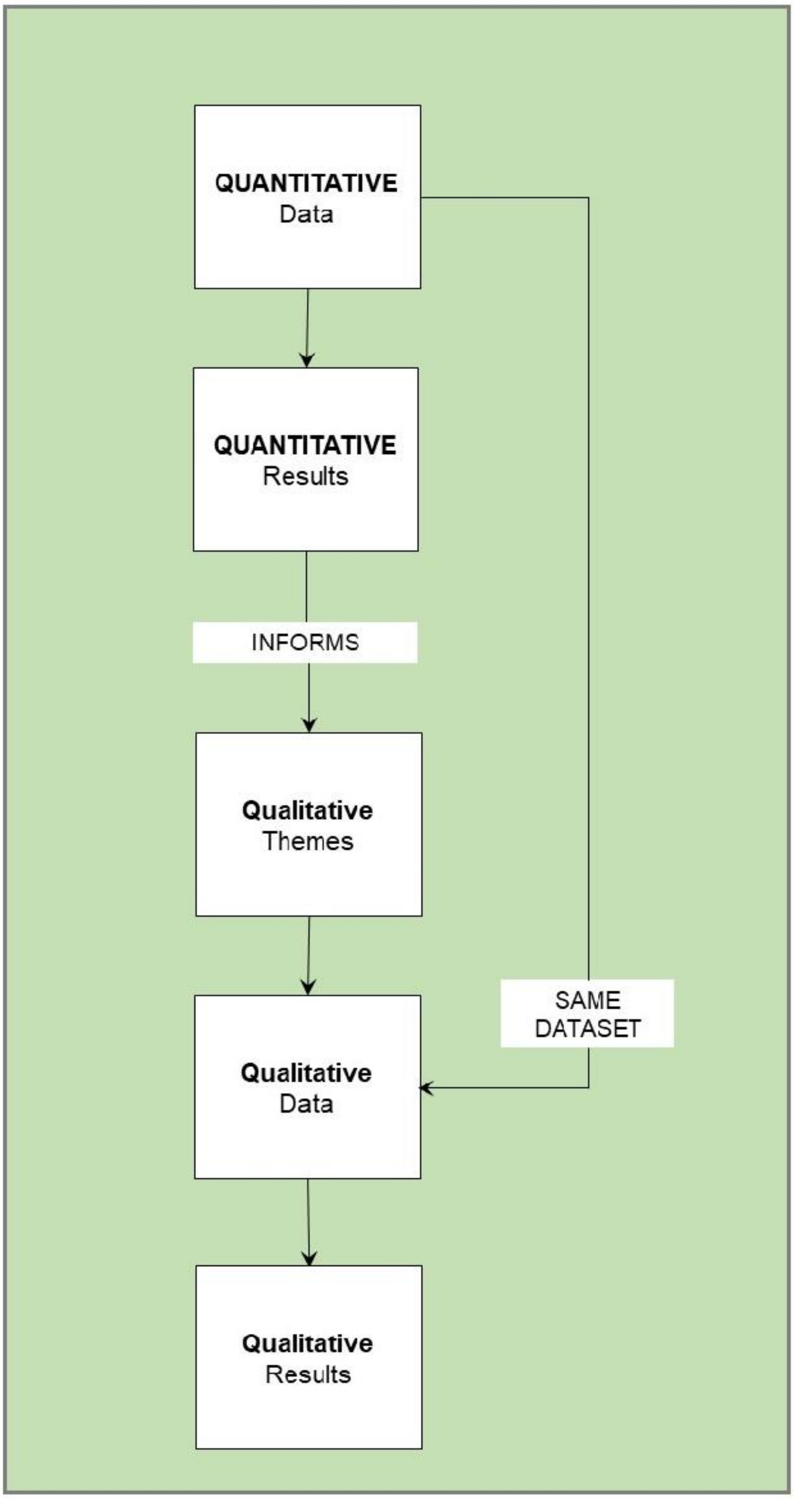
The two concurrent design methods - triangulation and embedded - were rejected. Firstly, triangulation, where the findings are corroborated by more than one method of investigation and which is recommended by several scholars (Webb *et al.*, 1966; Bryman, 1992; Hammersley, 1996). However, this was rejected as the purpose of the second phase is not to corroborate but to enrich the findings. Secondly, embedded design usually involves multiple research phases and can be centred around an intervention and in this study there was no intervention and thus the method was not applicable.

The two remaining mixed-methods design options were explanatory and exploratory. The difference is the order of the research type. Neither of these approaches are clear-cut and as observed by Ivankova, Creswell and Stick (2006), there is a requirement to consider the relative weight of each element of the research.

Exploratory design commences with qualitative research which informs the quantitative data, whereas the explanatory design begins with quantitative research and is succeeded by qualitative research (Creswell and Plano Clark, 2007; Bergman, 2008). Whilst these options are similar, explanatory design more closely met the research objectives of this study as the initial quantitative research could provide an explanation of social media application and the qualitative phase could add understanding.

Sequential design, proposed by Swanson and Holton (2005) offered emergent or fixed approaches. With emergent, the use of mixed-methods arises due to issues discovered in the research process. However, this was rejected in favour of fixed mixed-methods as the use of quantitative and qualitative methods was predetermined and planned at the start, as the quantitative survey results would inform the qualitative phase. This is described as an explanatory sequential mixed-methods design (Swanson and Holton, 2005), as illustrated in Figure 4.8.

Figure 4.8 Explanatory mixed-methods sequential design



Source: Adapted from Swanson and Holton (2005, p. 320).

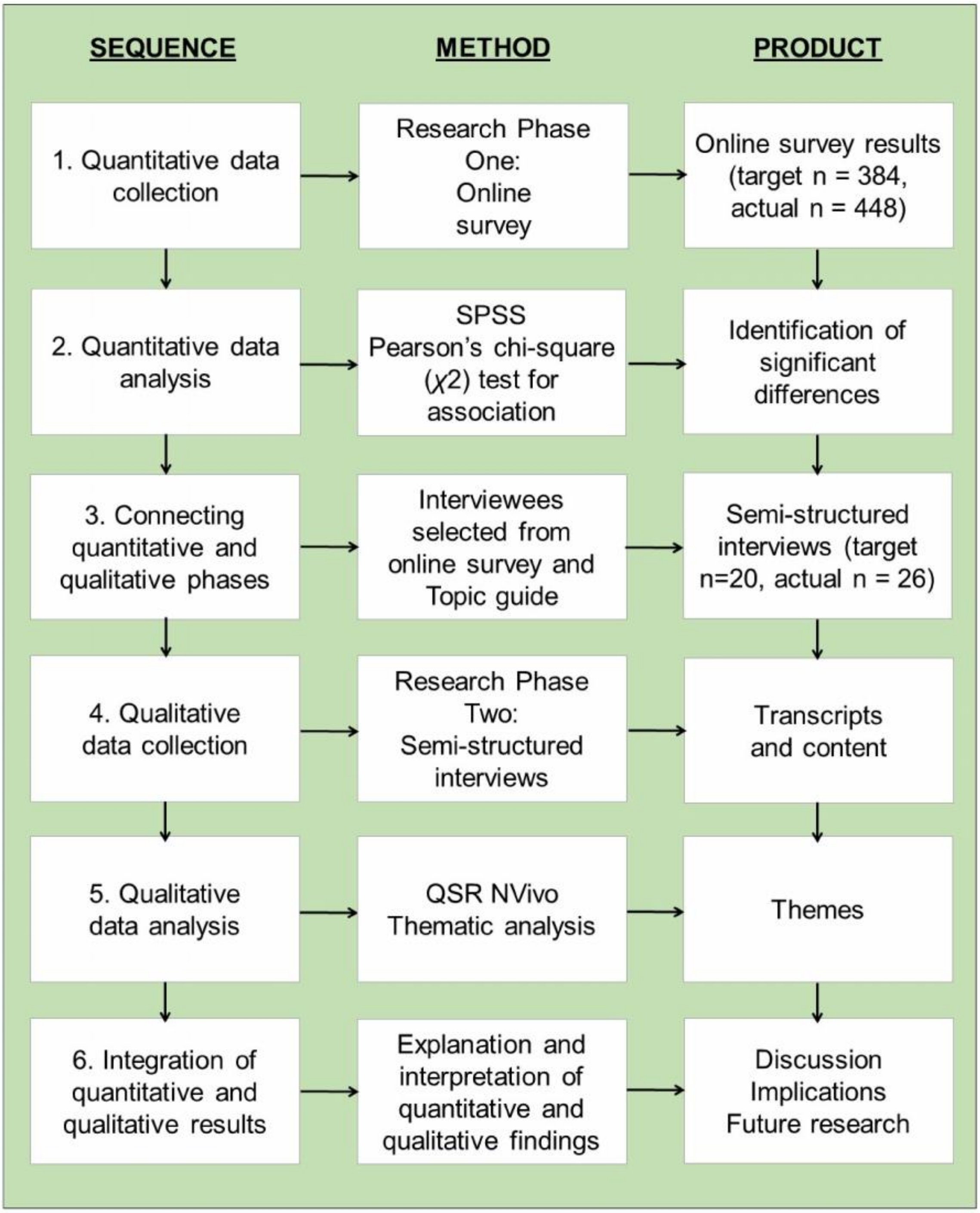
Advantages of this explanatory mixed-methods sequential design process included: (i) the possibility to use major themes from the first research phase; and (ii) the possibility to recruit a subset of participants for the qualitative phase from the quantitative phase.

Challenges that could occur included: (i) the time required to administer two research phases; (ii) the time that elapsed between one phase ending and another being was launched; and (iii) the possibility of gaining contradictory findings.

4.4.5 Description of each method in terms of sampling, data collection and analysis

Having justified the approach and provided the sequencing, the third step of the GRAMMS approach (O'Cathain, Murphy and Nicholl, 2008) is to 'Describe each method in terms of sampling, data collection and analysis' (p. 97). This is outlined in this section and Figure 4.9 provides an overview of the sequence, methods and resulting products.

Figure 4.9 Overview of sequence, methods and products for explanatory mixed-methods sequential study design



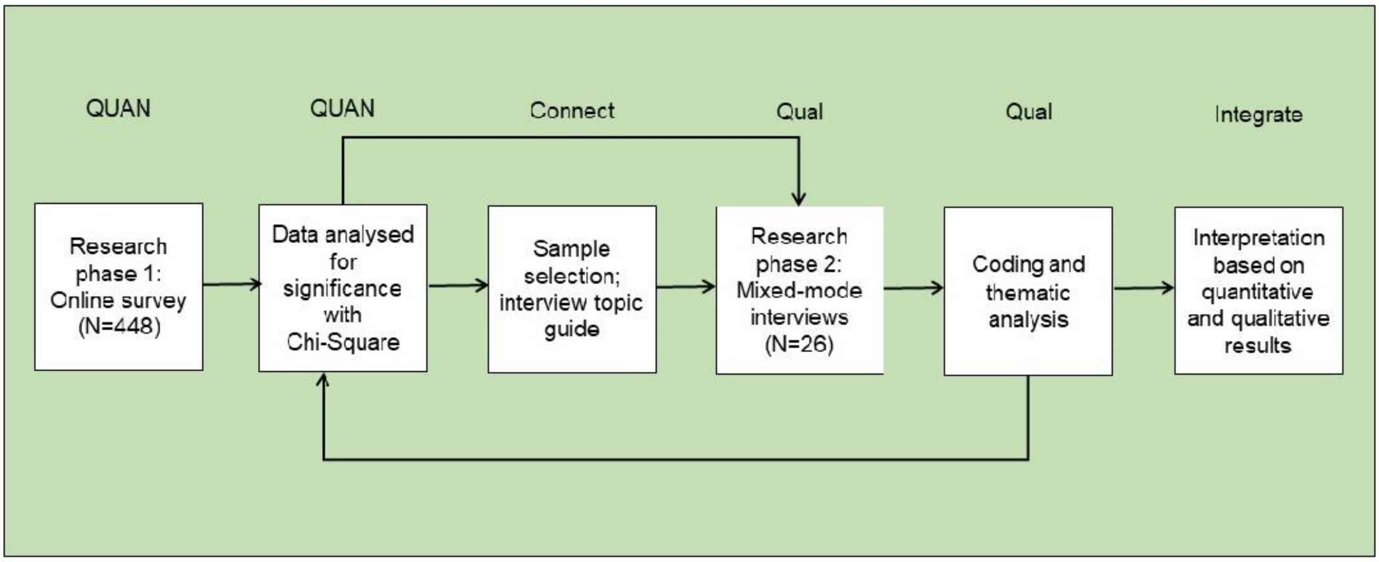
The research process for this explanatory mixed-methods sequential design is described in Chapter Five. The next section will discuss the integration process.

4.4.6 Integration

Step four in the GRAMMS approach (O'Cathain, Murphy and Nicholl, 2008) is to 'Describe where integration has occurred, how it has occurred and who has participated in it' (p. 97). The integration process in an explanatory mixed-methods sequential design utilises quantitative data and results to subsequently inform the qualitative approach.

Whilst both research phases were considered equal in terms of effort and application, in the explanatory mixed-methods sequential study design, the quantitative element is considered to be superior and to have priority over the qualitative element, as the survey findings inform and shape subsequent qualitative research which was the semi-structured interviews. As recommended by Ivankova, Creswell and Stick (2006) the qualitative design was based on the findings from the quantitative data in Research Phase One. Thus where areas of statistical significance were identified in the quantitative phase, these were connected to the next part of the sequence and transferred into the topic guide, to be examined and probed in Research Phase Two (Creswell and Plano Clark, 2018), as shown in Figure 4.10.

Figure 4.10 Explanatory mixed-methods sequential study design and procedures visual model of the process



Source: Adapted from Ivankova (2014, p. 31).

Furthermore, Creswell and Plano Clark (2018, p. 185) recommended that ‘individuals who participate in the qualitative phase should be individuals who participated in the quantitative phase’ and therefore the criterion for selecting participants in the qualitative phase was that they had responded in phase one. Additionally, Ivankova (2014, p. 42) remarked that adding new participants could result in ‘divergent views and cause inconsistencies’ which would threaten the validity of the study. Onwuegbuzie and Collins (2007, p. 292) refer to this as a subset, or ‘nested relationship’. Therefore an additional element of integration was to ensure that the same sample frame was considered and to examine the qualitative findings with individuals who had completed the quantitative study.

Final integration took place with the findings from both research phases being mixed as discussed in Chapter Eight.

4.5 Limitations and insights

The final steps in the GRAMMS approach (O'Cathain, Murphy and Nicholl, 2008) will be addressed in subsequent chapters and include: (v) describe any limitation of one method associated with the presence of the other method; and (vi) describe any insights gained from mixing or integrating methods.

4.6 Validity in mixed-methods

The GRAMMS guidelines (O'Cathain, Murphy and Nicholl, 2008) were designed to assess the quality of mixed-methods studies, thus adding rigour to the study's design, to ensure that transparency is provided and contribute towards the validation of the study, to ensure that the integration is justified. There are other methods of assessing validity in mixed-methods which are discussed in this section.

Onwuegbuzie and Collins (2007), postulated that the Triangulation Protocol (Farmer *et al.*, 2006), to provide validation, which would usually be accepted in a mixed-methods study (Saunders *et al.*, 2016), is not applicable in a sequential rather than a concurrent study, where the 'findings from the first approach might influence those from the second approach, thereby positively biasing any comparisons' (p. 292). Therefore validity is sought through complementarity to 'allow meanings and findings to be elaborated, enhanced, clarified, confirmed, illustrated or linked' (Saunders *et al*., 2016, p. 173).

Creswell and Plano Clark (2018, p. 252) suggested that validity methods depended upon the mixed-methods design selected. They subsequently recommended an approach for addressing threats to validity, specifically for the explanatory sequential design. This approach identified potential threats to validity, with strategies to minimise these threats and these are considered and applied to this study, as shown in Table 4.8.

Table 4.8 Threats to validity with a mixed-methods explanatory sequential design

VALIDITY THREATS	STRATEGIES TO MINIMISE THREATS	APPLIED TO THIS STUDY
Failing to identify important quantitative results requiring explanation	Consider all possibilities for explanation (significant and non-significant)	Pearson's chi-square (χ^2) test for association was employed to identify significant results and non-significant results were reported.
Not explaining surprising, contradictory quantitative results with qualitative data	Design qualitative data collection questions to probe into the surprising quantitative results	The qualitative data collection was based on the quantitative findings.
Not connecting the initial quantitative results with the qualitative follow-up	Purposefully select the qualitative sample using the quantitative results to identify participants from the sample of quantitative participants who can provide the best explanations.	The qualitative sample was selected from the quantitative respondents which represented a similar profile to the online survey.

4.7 Chapter conclusions

This chapter has illuminated some of the primary research philosophies to arrive at the researcher's philosophy and epistemological position.

The main contribution of this chapter was to demonstrate how the research objectives will be used. The chapter explained that pragmatism will be adopted and the research approach will comprise mixed-methods using the fixed explanatory sequential study design. This will firstly explain the social media application by organisations and secondly help to understand why this exists.

An additional contribution of this chapter was the adoption of the guidelines for 'Good Reporting of A Mixed Methods Study (GRAMMS) to demonstrate adherence to an evaluative process (O'Cathain, Murphy and Nicholl, 2008), within the domain of marketing. These guidelines are more often used within the field of healthcare and have recently been mentioned within business research

(Creswell and Plano Clark, 2018). As the call for mixed-methods in the area of marketing increases (Lamberton and Stephen, 2016), these guidelines may help future researchers.

The next chapter describes the sampling, data collection and analysis.

Chapter Five: Research Phases

5.1 Chapter introduction

Following the guidelines for 'Good Reporting of A Mixed Methods Study (GRAMMS)' (O'Cathain, Murphy and Nicholl, 2008), as illustrated previously in Table 4.6, this chapter will address steps 2 to 4 describing:

2. The design in terms of the purpose, priority and sequence of methods;
3. Each method in terms of sampling, data collection and analysis;
4. Integration and where it has occurred, how it has occurred and who has participated in it.

This chapter will explain the two research phases: Firstly the quantitative phase, the online survey; and secondly the qualitative phase, the semi-structured interviews.

Within Research Phase One, the quantitative online survey, this chapter explains the rationale for its selection and the sampling process. Subsequently, potential bias and ethical issues will be discussed. Data collection methods and the questionnaire design will be presented, demonstrating how Chapter Two and Chapter Three contributed towards the questionnaire design. The pilot test and instrument administration are detailed, following the GRAMMS guidelines (O'Cathain, Murphy and Nicholl, 2008). This section concludes with the questionnaire content and data analysis procedures.

Research Phase Two, the qualitative semi-structured interviews, is subsequently explained. This commences with the rationale for choosing this method. Consequently the sample frame is discussed and followed by details concerning the interview formats. The instrument administration is provided and the data analysis procedures are defined.

5.2 Research process

The purpose of the primary research was to determine and evaluate current social media marketing application within organisations. The literature review explored these research questions in order to identify the critical success factors for organisations:

i. What is social media?
ii. Why do individuals use social media?
iii. Are there different types of social media users?
iv. Are there differences in social media usage based on generational cohorts?
v. How can organisations use social media?
vi. What supplementary opportunities do social media offer organisations?
vii. What are the critical factors in social media usage for organisations?
viii. Are there guidelines for the application of social media within organisations?

The next phase considers Research Objective 2: 'To conduct primary research in order to determine and evaluate current social media marketing application within organisations'. Table 5.1 shows the connections between the research aim, objectives, questions and selected study methods.

Table 5.1 Research aim, objectives, questions and study method

RESEARCH AIM		
To investigate social media marketing within organisations in order to identify critical success factors and develop a framework for social media application in organisations.		
RESEARCH OBJECTIVE	**RESEARCH QUESTIONS**	**STUDY METHOD**
To conduct primary research in order to determine and evaluate current social media marketing application within organisations.	1. Are there differences in social media marketing application based on generational cohort? 2. Are there differences in social media marketing application based on skills? 3. What are the significant differences?	Quantitative online survey
	4. Why do the significant differences exist?	Qualitative semi-structured interviews

The next section will discuss the research phases in the sequences conducted.

5.3 Research Phase One: Quantitative Online survey

5.3.1 Aims of Research Phase One

The principal aim of Research Phase One was to investigate the critical success factors within organisations and to address three key questions:

- Are there differences in social media application based on generational cohort?
- Are there differences in social media application based on skills?
- What are the significant differences?

Following a pragmatist ontology and epistemology, the generational cohorts and skills – represented by the presence or absence of formal marketing qualifications – were problematised, as part of Dewey's systematic approach (Morgan, 2014).

5.3.2 Rationale

As this phase was to explain a situation, a quantitative survey was employed. As described by Bryman and Bell (2011, p. 54), a cross-sectional design involves data ‘collected predominately by questionnaire… which are then examined to detect patterns of association’. Surveys are a useful method of gathering answers from a larger population to questions in a cost-effective manner (Saunders *et al.*, 2016).

Online surveys have increased in popularity for numerous reasons, for example; the responses collected are simultaneously stored and ready for analysis (Vehovar and Manfreda, 2008) and there is wide availability of cost-effective online survey software systems (Hewson, Vogel and Laurent, 2016). However disadvantages include the non-response problem (Vehovar and Manfreda, 2008; Park and Fesenmaier, 2012) as participants may choose not to respond or withdraw during the questionnaire due to sensitive topics being raised or sensitive answers being required (Albaum, Roster and Smith, 2014).

Access to the target population online, as opposed to face-to-face, is both an advantage, as they are easier to contact, and a disadvantage as the message may be considered spam in an online environment (Wright, 2006). This should be mitigated via respecting the access granted to the group and ensuring that the researcher’s credentials are shared.

5.3.3 The sample

There are recognised issues with online surveys, such as the lack of a registry of internet users, and the fact that the target population in particular studies may not have access to the internet. However in this study there was access to the target population and as this concerned those working in marketing and using social media for work, necessitating internet access, this barrier was removed.

The population of interest comprised those working in marketing. In an attempt to generalise the findings, a probability sampling method was initially considered. Traditional probability sampling methods used in postal or telephone surveys aim to provide all those in the same frame with an equal chance or probability of being selected. This may involve a random sampling technique such as selecting every *nth* household or using random number tables.

However, Gorard (2015, p. 75) suggested that a random sample was technically a ‘pseudo random sample’ as all methods of generating the sample involve a process and are thus not random. He further suggested (p. 76) that:

> A random sample must be complete in two senses. It must include every case that was selected from the population by chance. There can be no non-response, refusal or dropout in a random sample (by definition - again this is not a matter of opinion or belief) and every case selected must have a known measurement or value of the characteristic of interest (height, number of rooms or whatever). There must be no missing values.

The implications are that it is not possible to adopt probability sampling methods for computer-mediated surveys unless the response rate is 100 per cent. Therefore, with missing values and non-responses, this study involved a non-probability purposive sample.

Lists of closed populations were accessed from five different sources which represented those working in marketing in a range of ages and skill sets. The five lists were accessed via: [CONTENT REDACTED TO PRESERVE ANONYMITY OF PARTICIPANTS].

In all cases, the lists did not represent the list owner's entire population (i.e. all clients and or all those registered), but a group that had agreed to receive specific material, which could be considered a form of pre-recruited panel, rather than a census. It should be noted that the list accessed via the [CONTENT REDACTED TO PRESERVE ANONYMITY OF PARTICIPANTS] excluded those without internet access. However as these individuals were unlikely to be using social media for work, they would thus be outside the desired population.

Writing in *The SAGE Handbook of Online Research Methods*, Professor Ronald D. Fricker (2008) remarked:

> Survey sampling methodologists should endeavour to develop new sampling paradigms for Internet-based surveys. The fundamental requirement for a probability-based sampling scheme is that every member of the target population has a known, non-zero probability of being sampled. While in traditional surveys this can be achieved via various frame and frameless sampling strategies, it does not necessarily follow that Internet surveys must use those same sampling strategies (p. 213).

Confounding the issue, according to Schonlau, Fricker and Elliot (2002), a closed population list provides the opportunity of conducting probability sampling. Table 5.2 shows their options for sampling selection methods for internet-based surveys and those applied to this study.

Table 5.2 Sampling selection methods for internet-based surveys applied to this study

Sampling Category	**Selection Method**	**CLOSED POPULATION LIST SOURCES** [CONTENT REDACTED TO PRESERVE ANONYMITY OF PARTICIPANTS]				
Convenience	Uncontrolled instrument distribution					
	Systematic sampling of Web site visitors					
	Volunteer panel					
Probability	Sample from a closed population list	✓	✓	✓	✓	✓
	Sample from a general population					
	Pre-recruited panel	✓	✓	✓	✓	✓

Source: Adapted from Schonlau, Fricker and Elliot (2002).

According to several scholars (Schonlau, Fricker and Elliot, 2002; Fricker, 2008), online research using a list-based sampling frame facilitates a probability-based survey as there are no formal lists of internet users. However, there was no method of selecting individual users due to the instrument administration procedures, although it could be argued that every member of the target population had an equal chance of being sampled.

Equally, the collective group could thus be considered as a recruited web panel, although no formal arrangements were in place to evidence this activity. Therefore whilst this meets several of the requirements for a probability study, including the controlled instrument distribution to a set of closed lists, in the absence of traditional random selection this will be considered as a non-probability sample. However, the guidelines pertaining to a probability sample will be followed.

These lists provided access to the required survey population and it is recognised that there are advantages of using existing lists, such as generalisability (Hewson, Vogel and Laurent, 2016, p. 96). However, the disadvantages included potential financial implications, gaining access to the list and non-response errors which is a perennial issue in online surveys (Couper, 2000; Hewson, Vogel and Laurent, 2016).

5.3.4 Potential bias and errors

Further issues concern potential bias in the results. Using a non-probability method means that there may be sampling error where the sample does not represent the target population adequately. However, potential participation bias in the sample was reduced by using five different lists representing a wide population of those working in marketing. As the findings illustrated, the respondents were from different generational cohorts, different job roles and different sectors, hence mitigating sampling errors.

Another issue is whether the sampling frame is inadequate. Based on a 95 per cent confidence level with a five per cent margin of error, the desired response rate was a minimum of 384 useable surveys with the total population being less than 10,000,000 (see for example Saunders *et al.*, 2016, p. 281). The number of completed surveys was 448 which, in a probabilistic setting, represents generalisability to 95 per cent of the population, thus reducing the argument of the sampling frame being inadequate.

Non-response is a major factor in online surveys and according to Saunders *et al.* (2016, p. 280) ‘researchers normally work to a 95 per cent level of certainty’, thus the confidence level was set at 95 per cent. The sample frame was 89,453 people working in marketing.

However, several researchers have observed that response rates to web surveys are lower than traditional postal surveys (Millar and Dillman, 2011; Hewson, Vogel and Laurent, 2016) and that the application of traditional methods to increase response rates does not easily transfer to online surveys (Couper, 2000; Bosnjak and Tuten, 2003). This view corresponded with Manfreda *et al.* (2008) who conducted a meta-analysis reviewing different types of surveys and noted that ‘non-response is demonstrably higher for web surveys in most cases, compared to other modes’ (p. 97). Mouncey (2014) suggested that web surveys exhibited lower responses to other survey methods and commented that whilst data quality issues may exist, ’using response rates as a measure of data quality is flawed’ (p. 414).

Singer and Ye (2013) evaluated earlier research on postal and web surveys and concluded that monetary pre-paid incentives have an impact on response rates although they ‘are difficult to implement in Web surveys’ (p. 134). Their analysis did not ascertain whether the incentives had an impact of the survey quality. However, in this study, financial incentives were not offered for the primary reason that no budget was available and secondly because the surveys were managed by third-party administrators and gaining consensus on a single approach was challenging.

To increase response rates, it is recommended to remind potential respondents to participate (Sauermann and Roach, 2013), although this was not possible with this study due to the third-party access to the lists.

Thus the survey was issued, in a single email, with no reminders and no incentives. It was therefore expected that this would generate a lower response rate.

5.3.5 Ethical considerations

There were no identified risks for respondents participating in this research project and ethical approval was gained from the University of Derby's College Research Ethics Committee in March 2016 (University of Derby, 2016) and this is shown in Appendix A.

However, a robust approach was taken to obtain consent and rather than being implied, respondents needed to click the box to confirm that they granted consent in order to comply with Regulation (EU) 2016/679 (General Data Protection Regulation), this is shown in Appendix E (survey consent letter for respondents in Research Phase One). Respondents were advised that their data would be stored securely for up to five years although their personal data (name, email, company) would remain anonymous. They were further advised that the anonymised data might be shared with colleagues for additional research.

SurveyMonkey stores data from the account as long as the account is live, which is 'certified under the EU-US Privacy Shield and Swiss-US Privacy Shield Programs' and meets European data storage requirements (SurveyMonkey, 2018b).

5.3.6 Data collection

To clarify the data collection process, the procedure to administer the data collection is addressed in this section.

As part of the agreement for gaining access to the lists and to comply with data protection regulations, the researcher could not access the participant data nor control the exact timing of the survey distribution other than for the researcher's own list, although this was issued via a third-party software mailing system (Mailchimp). Therefore the process for sampling involved the data administrators issuing a single personalised email with a link to the SurveyMonkey online survey software package. SurveyMonkey is a recognised and well-known platform which enables ‘researchers to easily transfer the data to sophisticated statistical analysis programs’ (Saleh and Bista, 2017, p. 64).

The survey instrument was issued at a time convenient to the data administrators between 17 July 2017 and 31 October 2017. As the list data was managed by third parties who were providing privileged access, rather than a professional service, they did not report back on the non-delivery of email. However, all of the lists were live, meaning that they were updated on an automatic or ongoing basis and in all cases those on the lists had registered rather than being opted-in.

5.3.7 Evaluation criteria

To evaluate the quality of the findings Bryman and Bell (2011) suggested that in a quantitative study, researchers should consider: (i) reliability and whether the results are repeatable; (ii) replication and whether the procedures can be replicated; and (iii) validity in order that the conclusions demonstrate integrity.

In online surveys, many threats to reliability are removed as the method is consistently applied to all and the researcher and participant do not meet. Respondents are in control of when and how they complete the surveys, thus removing potential respondent error and bias. Other potential respondent errors are removed by the use of pilot-testing the survey. Researcher bias is removed as the online survey is self-administered and all participants follow the same set of questions. Threats to internal validity could exist as the research instruments were issued at different times, although all were issued within a four-month time-frame (between July and October 2017). Using a mixed-methods approach contributes towards the overall rigour of the study, ensuring that the results are validated through complementarity.

5.3.8 Questionnaire design and question order considerations

The aim of the questionnaire was to understand the usage and benefits of social media in an organisational setting. According to Saunders *et al.* (2016, p. 449), much of the internal validity and reliability depend on 'the design of your questions [and] the structure of your questionnaire'. Therefore, as suggested by Kaczmirek (2008), the design started as a text document to consider the flow of the questions and ensure that the questions could measure what was intended.

Whilst online surveys provide a plethora of design options, these should be used with care as the visual layout of surveys has an impact on the respondents (Couper, Traugott and Lamias, 2001; Tourangeau, Couper and Conrad, 2004). The layout of an online questionnaire is further facilitated by online survey systems; the use of templates is recommended (Kaczmirek, 2008) and was adopted. A simple design with a white background was selected to make reading and completing the questions straightforward (Saunders *et al.*, 2016).

As a self-completed questionnaire it commenced with a welcome screen, explaining the background to the research and providing key facts (Saunders *et al.*, 2016). This was followed by a self-administrated online questionnaire with sixteen questions in six parts, starting with a qualification or disqualification to proceed, requesting consent and checking that the respondent was within the scope of the survey. Part two outlined the organisation background and parts three, four and five examined social media purpose and benefits; process and strategy; and management.

The online format comprised three pages: (i) the welcome screen and consent confirmation; (ii) the filter question; and (iii) the main survey which, to help improve response rates was all on one page, thus enabling respondents to see all questions at once (Brace, 2013). A progress bar was not included as it was superfluous.

As an online survey, it is necessary to consider the screen size (Christian, Parsons and Dillman, 2009). However, the online survey tool SurveyMonkey, automatically provided responsive screen options for desktop, tablet and mobile, resizing the screen and text depending on the device used to access the survey.

The survey commenced with general questions rather than detailed questions about the usage of social media, as recommended by researchers (Lietz, 2010; Brace, 2013). Following advice from Olsen (2012), demographic questions can be sensitive and should therefore be placed at the end of the survey.

To investigate the social media application, the critical factors identified in the literature review were utilised. This resulted in a questionnaire consisting of sixteen primary questions to measure the five constructs, with secondary question parts, including: purposes of social media use (11 items); benefits gained from social media (8 items); social media processes (3 items); social media strategy (9 items); and resources (5 items). This is shown in Table 5.3, which includes the connected elements from the literature review.

Table 5.3 Question constructs and items connected to literature review

CONSTRUCT	**ELEMENTS TO EXPLORE**	**LOCATION IN LITERATURE REVIEW**
Affordances (purposes) of social media use	- Entertainment - Social interaction - Information - Communication - Community development - Remuneration (offers)	Chapter Two: Critical factors in user purpose of social media
Affordances (benefits) gained from social media	- Entertainment - Engagement - Information - Brand management - Communication - Community development - Remuneration - Sales cycle (reviews) - Customer service - Market and product research - New product development - Customer segmentation - Monitorability / surveillance	Chapter Three: Critical benefits from social media for organisations
Social media processes	- Connected processes (formalisation stage) - Integrated processes (consolidation and integration stage) - Customer focus (institution absorption stage)	Chapter Three: Stages of growth
Social media strategy	- Vision - Research - Resources - Customer focus - Integration - Manage - Measure - Income	Chapter Three: Social media guidelines applied to the stages of growth model

The responses to the five constructs were either category or closed questions. The category questions were designed to capture data about behaviour. The closed questions provided simple responses and ensured the survey was easy to answer, following best practice guidelines (Bryman and Bell, 2011; Hewson, Vogel and Laurent, 2016).

5.3.9 Pilot-test

Prior to issuing the survey, a pilot-test was organised with a link to the survey shared amongst a convenience sample of colleagues and those working in social media. From these groups, eleven individuals, including the researcher's supervisors, trialled the survey and provided feedback. The purpose of the pilot-test was to check the flow and the ease of answering the questions and to ensure that the questions were understood to reduce potential measurement error (Dillman, Smyth and Christian, 2009).

The pilot-test resulted in some layout changes and the inclusion of three new questions to (i) to confirm consent was given; (ii) investigate social media resources, based on feedback from several respondents who said there was nowhere to explain that additional staff were needed to manage social media; and (iii) to recruit participants for the qualitative research ('my organisation would like to participate in further research').

Timing in the pilot-test confirmed that the questionnaire could be completed in around six minutes.

5.3.10 Instrument administration

The online survey was administered via SurveyMonkey - a long-established online survey tool which has been recommended by several researchers (Bryman and Bell, 2011; Hewson, Vogel and Laurent, 2016; Saunders *et al.*, 2016).

As there were five closed email lists, five separate survey links were created in order that email invitations could be sent via the third-party administrators to accommodate their schedules.

The survey took place between July and October 2017 with the sample frame representing those working in marketing roles at different levels and industries, to reduce possible coverage error and ensure that all members of the population could have a chance of being included in the sample (Dillman, Smyth and Christian, 2009).

An issue noted by several researchers is multiple completion, where the same respondent completes the survey numerous times for entertainment or incentive (Couper, 2000; Couper, Traugott and Lamias, 2001). Therefore, to increase the internal validity the survey could only be completed once per logged-in respondent and per device as SurveyMonkey facilitated the option to remove 'multiple response completion' which was used to eliminate this possibility. In the case that a respondent was on more than one list, a manual check was undertaken in Microsoft Excel to identify any duplicate responses based on email address and company name where provided.

5.3.11 Questionnaire content

Appendix F contains the full questionnaire for the online survey for Research Phase One and each element is explained in this section.

Part one: Qualification / disqualification

The questionnaire started with a simple 'yes' or 'no' to consent in the survey which automatically disqualified those answering 'no' and filtered them out of the survey to a 'goodbye and thank you' page.

The second question asked, ‘Does your organisation use social media for business purposes, such as communicating with customers?’ and again this was based on a dichotomous ‘yes’ or ‘no’ where if a negative response was received, the respondent was again filtered out as they were outside the scope of the survey.

Those agreeing to participate and confirming that they used social media for business purposes progressed to part two - general questions concerning their organisation’s background.

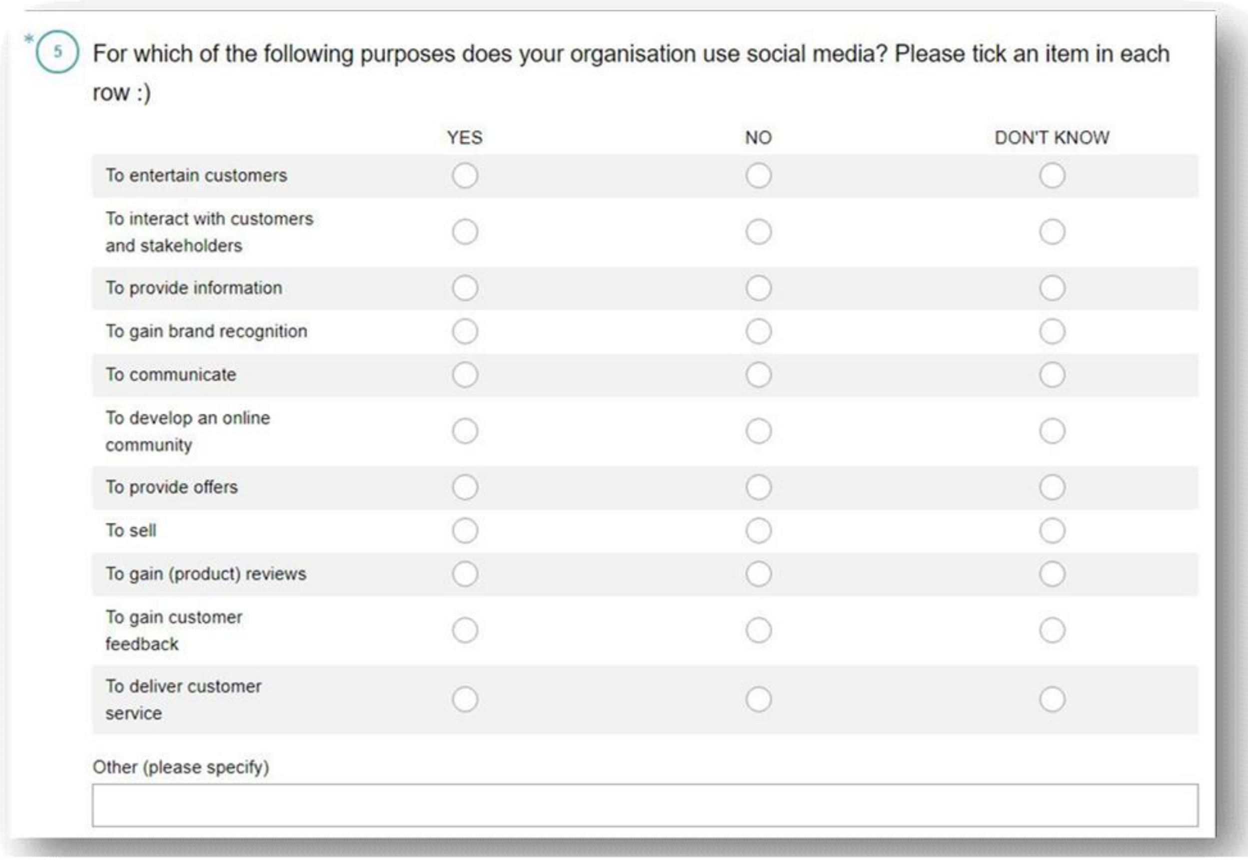
Part two: Organisation background

The next part of the survey explored two questions about the organisation: the job role of the respondent and the main sector in which they operated. This was based on what was essential to the research questions, to limit the number of questions and to ensure the survey was not longer than necessary (Saunders *et al.*, 2016).

Part three: Social media purpose and benefits

Question 5 explored the reason why the respondents’ organisations used social media. Respondents were asked to confirm ‘for which of the following purposes does your organisation use social media?’ This comprised eleven options which were identified in Chapter Two in the literature review as critical factors of the usage of social media. This question was to understand the association between the users’ requirements and organisations’ actions and is shown in Figure 5.1.

Figure 5.1 Screenshot of question 5: For which of the following purposes does your organisation use social media?



* 5 For which of the following purposes does your organisation use social media? Please tick an item in each row :)

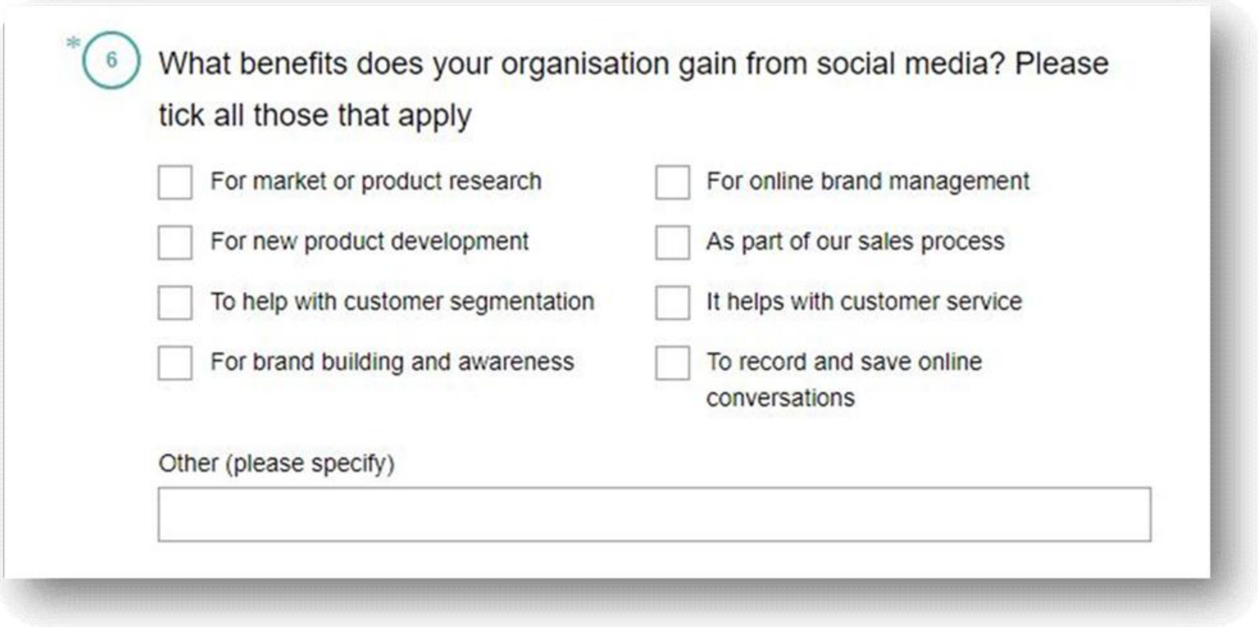
	YES	NO	DON'T KNOW
To entertain customers	○	○	○
To interact with customers and stakeholders	○	○	○
To provide information	○	○	○
To gain brand recognition	○	○	○
To communicate	○	○	○
To develop an online community	○	○	○
To provide offers	○	○	○
To sell	○	○	○
To gain (product) reviews	○	○	○
To gain customer feedback	○	○	○
To deliver customer service	○	○	○

Other (please specify)

This was a compulsory question requiring a response and as this was to explore the behaviour, no opinion was required, thus it was a dichotomous yes or no scale rather than gathering the extent to which social media was used for these purposes. Although there are mixed and potentially confusing recommendations regarding the ‘don’t know’ option, following guidance from Bradburn, Sudman and Wansink (2004), a ‘don’t know’ option was included to ‘reduce guessing’ because a response was required for each row (Bradburn, Sudman and Wansink, 2004, p. 203).

Question 6 ‘What benefits does your organisation gain from social media?’ was based on the examples of the affordances from social media. Brace (2013) recommended for greater reliability that technical terminology be eliminated so that the questions can be understood, therefore ‘affordances’ was replaced with ‘benefits’ in this question and is shown in Figure 5.2.

Figure 5.2 Screenshot of question 6: What benefits does your organisation gain from social media?

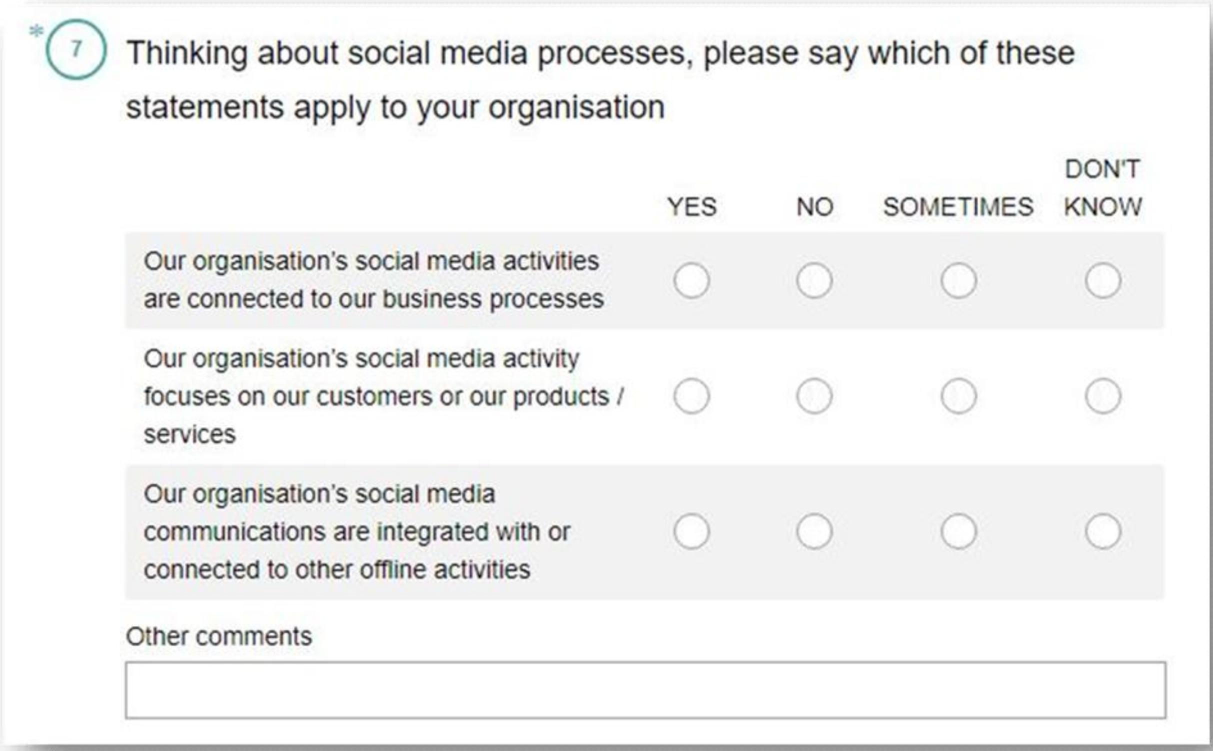


The eight critical benefits from social media for organisations were those identified in Chapter Three, which were subsequently designated as affordances. This was a nominal question to understand if there were different affordances based on generational cohort or formal marketing qualifications.

Part four: Social media process and strategy

The integration of social media was considered in question 7, which concerned processes. Respondents were asked to confirm which statements applied to their organisation. As recommended, a personal rather than formal tone was used, referring to ‘your organisation’ rather than ‘the organisation’ (Brace, 2013, p. 183). The response format was a closed question with four items in a horizontal matrix format and is shown in Figure 5.3.

Figure 5.3 Screenshot of question 7: Thinking about social media processes, please say which of these statements apply to your organisation


* 7 Thinking about social media processes, please say which of these statements apply to your organisation

	YES	NO	SOMETIMES	DON'T KNOW
Our organisation's social media activities are connected to our business processes				
Our organisation's social media activity focuses on our customers or our products / services				
Our organisation's social media communications are integrated with or connected to other offline activities				

Other comments

As some respondents may have been junior staff, they may not have been aware of all processes, therefore the ‘don’t know’ option was included. ‘Sometimes’ was added based on feedback from the pilot-test.

Guidelines for the organisational application of social media have been explored by several researchers and were discussed in Chapter Three. These core themes were framed in nine items presented to the respondents and shown in Figure 5.4.

Figure 5.4 Screenshot of question 8: Social media strategy

* 8. Thinking about social media strategy, please say which of these statements apply to your organisation

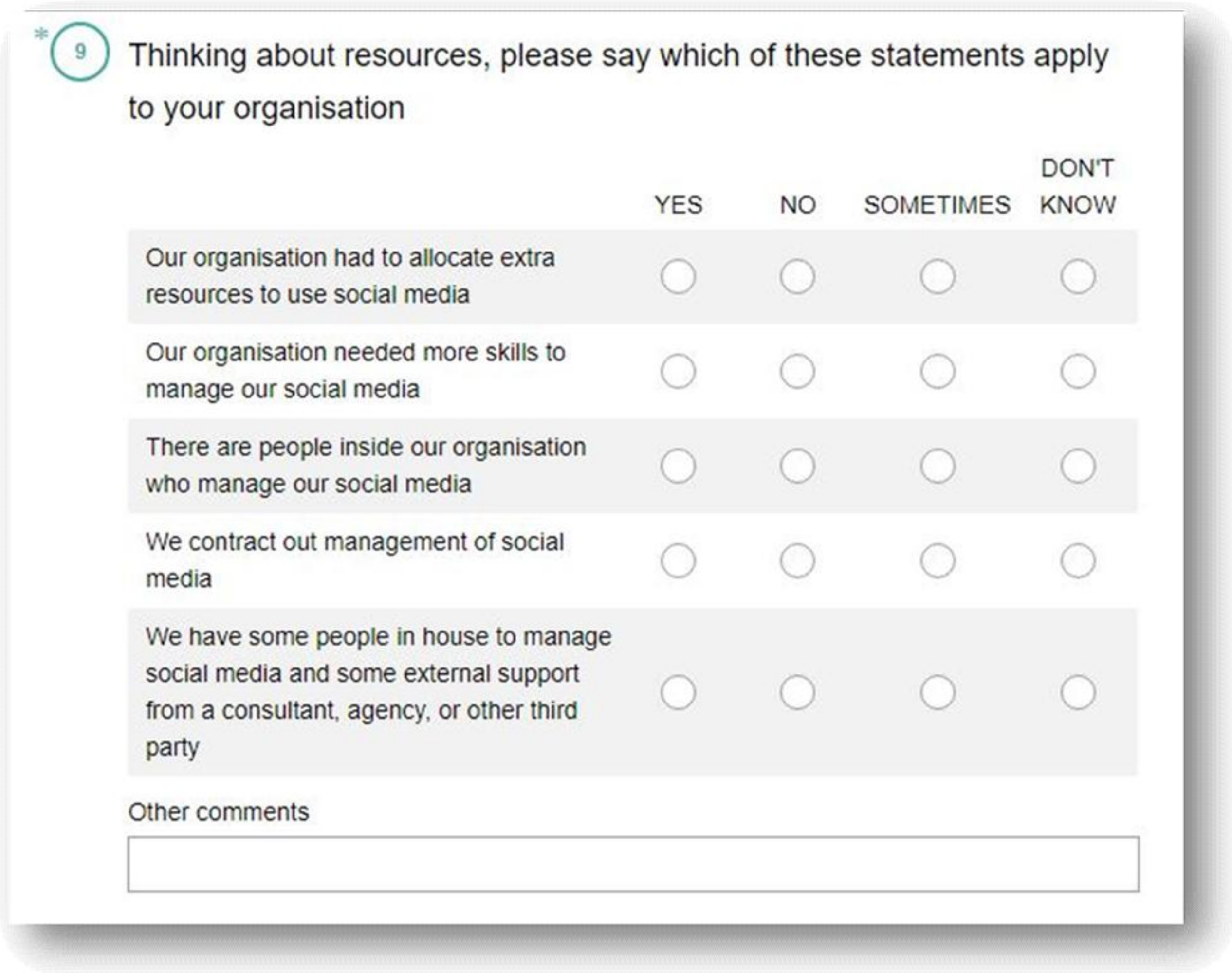
	YES	NO	SOMETIMES	DON'T KNOW
We have a clear strategy and vision for social media management				
We have clear objectives in place for social media management				
Before we started using social media, we carried out some research				
When selecting social media channels (such as Facebook, Twitter, Instagram) our organisation considered the initial set-up cost and the ongoing maintenance costs				
Our organisation manages all social media interaction, for example, we respond to all or most comments online				
We measure results from social media				
Our organisation reflects on the performance of the social media activity				
Our organisation measures the value of social media				
Our organisation considered potential risks before using social media, such as negative comments				

Other comments

Part five: Social media management

One question was asked in this section concerning resources, to understand whether a skills gap existed, whether re-training was required or if outsourcing was employed. As before, the format was a list from which the respondents selected one of the responses (i) yes; (ii) no; (iii) sometimes; or (iv) don’t know. This was a compulsory question requiring an answer on each row and is shown in Figure 5.5.

Figure 5.5 Screenshot of question 9: Social media resources



* 9 Thinking about resources, please say which of these statements apply to your organisation

	YES	NO	SOMETIMES	DON'T KNOW
Our organisation had to allocate extra resources to use social media				
Our organisation needed more skills to manage our social media				
There are people inside our organisation who manage our social media				
We contract out management of social media				
We have some people in house to manage social media and some external support from a consultant, agency, or other third party				

Other comments

Part six: Individual demographics

Although there are arguments for placing demographic questions at the start as they are easy to answer (see for example: Saunders *et al.*, 2016), other researchers recommended locating these at the end of the survey. Jackson (2009, p. 95) suggested that this was to ’prevent participants from losing interest’, whereas Olsen (2012, p. 120) postulated that ‘many respondents actually find them relatively challenging’. These questions were therefore placed at the end of the survey and focused on the essential requirements for the study. This included qualifications, the generational cohort of the individual, the age of the organisation and the age of directors. Following the pilot-test, this included an invitation to receive survey results and to participate in further research.

5.3.12 Data analysis procedures

Data analysis was conducted using IBM SPSS Statistics® version 24 (IBM, 2017). Before the analysis took place, the survey was exported from SurveyMonkey into Microsoft Excel for data cleansing and combining where the first procedure was to combine the data from all five groups into one workable spreadsheet. The results of this analysis are discussed in Chapter Six.

Some questions were refined in Excel for easier analysis, and these are described in this section.

Question 3 job title

Question 3 job title, the option ‘other’ was provided and resulted in many variations of the same role, therefore all job titles were refined into five primary functions: Academic, C-suite (chief executive, chief marketing officer), Manager, Junior, or Specialist. This was conducted manually based on the researcher’s experience.

Question 4 sectors

Question 4 sectors was problematic from the start. Initially the Standard Industrial Classification was to be used, however this resulted in the granular detail of hundreds of sectors. This was refined and reduced after the pilot-test and the option ‘other’ was added which once again was used.

Using pivot tables reduced this to 19 categories where at least five cases were present, resulting in the following categories: Automobiles and Parts, Charity / Non-profit, Construction and Materials, Education, Financial Services, Food and Beverage, Government / Public Sector, Health Care, Industrial Goods and Services, Manufacture, Media, Personal and Household Goods, Professional Services, Real Estate, Retail, Technology, software and IT, Telecommunications, Travel and Leisure, Utilities.

Category responses

Questions 7 and 8 had four categories of responses: (i) yes; (ii) no; (iii) don’t know; (iv) sometimes. These were refined into three categories with those responding ‘sometimes’ placed into the ‘yes’ category as they had at some time completed the activities.

Other responses

The questions where there was an option for an ‘other’ response, were individually reviewed and in all cases, this was an extension of an earlier response with additional qualitative information.

Yes and no responses were coded as 1 and 2 for the purposes of importing them into the statistical software SPSS, as were the ‘I am aged under 37 years old’ and ‘I am 37 years old or more’.

All questions were analysed using Pearson’s chi-square (χ^2) test for association to understand if there was significance between the nominal variables of digital natives (aged 37 or under) and digital immigrants (aged over 37 years old) and their formal marketing qualifications.

5.4 Research Phase Two: Qualitative semi-structured interviews

5.4.1 Aim of Research Phase Two

Following Dewey's model on inquiry (Morgan, 2014), the principal aim of Research Phase Two was to investigate the significant factors in social media marketing application within organisations, based on the findings from the online survey phase and to address one key question: 'Why do the significant differences exist?' Therefore a method which enabled greater understanding was required, which followed the pragmatist ontology and sought experience from the participants and as Dewey (1905), stated that experience was based on context and thus the participants were answering for their organisation.

5.4.2 Rationale

Adopting a mixed-methods approach, the quantitative survey results informed areas to explore in the qualitative phase following an explanatory mixed-methods sequential design (Swanson and Holton, 2005). Thus the qualitative approach was to add richness and further investigate areas of significance or interest that were identified in Research Phase One .

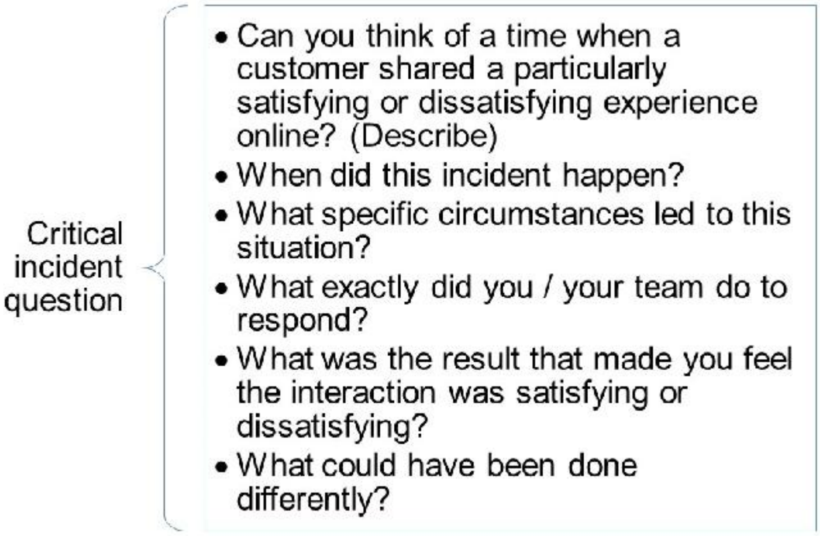
Providing understanding necessitated a form of conversation to understand why certain decisions may have been taken or choices made. (Saunders *et al.*, 2016). Another option for qualitative research included the case study method (Yin, 2009) which was considered and subsequently rejected for several reasons:

- The lack of access to multiple subjects in single organisations, for example one non-participant advised 'Thanks for your email, and apologies that I'm going to choose to not take part - my time and my bosses is so fenced off and we are having to really prioritise' (ref 128).

- Those willing to participate did not always wish to speak in the office and preferred to choose a time when they would be working from home without any colleagues present (10 participants).
- Some were concerned about their anonymity [CONTENT REDACTED TO PRESERVE ANONYMITY OF PARTICIPANTS].

Thus the interview method was selected as ‘a conversation that has a structure and a purpose’ (Kvale and Brinkmann, 2009, p. 3). Embedded into the research design was a recognised investigative qualitative method - the critical incident technique (Flanagan, 1954). Whilst described as a flexible approach to gathering more information, it is often applied in a service setting (Longbottom and Lawson, 2016). In this study, the aim was to gain more information about service quality and its purpose in the semi-structured interviews was to explore skills and training within the participants’ organisations. Figure 5.6 shows the critical incident question frame.

Figure 5.6 Critical incident question used in the semi-structured interview process



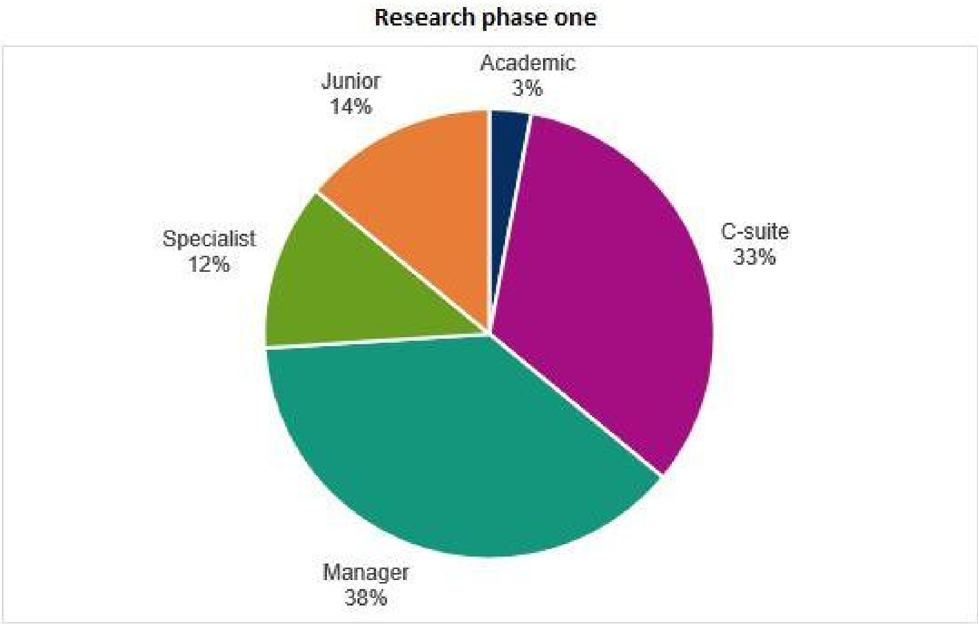
The critical incident question was designed to better understand any processes or application of social media that had not been identified earlier or that had been overlooked in the topic guide.

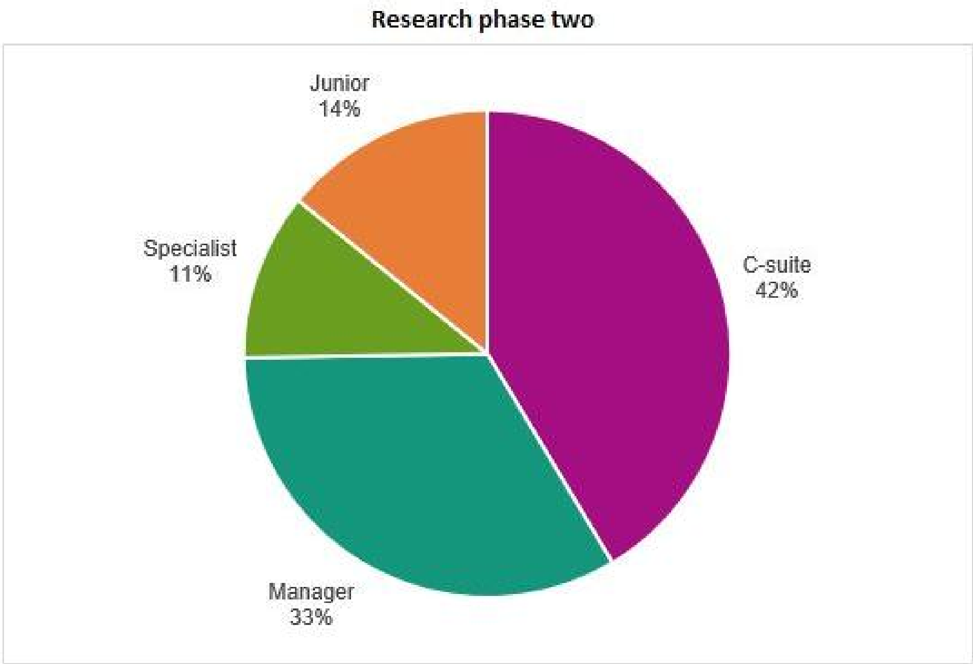
5.4.3 The sample

Research Phase One surveyed those working in marketing and the online survey included a question to recruit participants for Research Phase Two: *Q16: My organisation would like to participate in further research*. Those who said yes to question 16 created a bounded sample (Miles and Huberman, 1994) and thus provided permission to be contacted.

There were 197 respondents who indicated that they would be willing to help further, of which 61 per cent (121) were aged 37 years old or more and 39 per cent (76) were aged under 37 years old. This was similar to Research Phase One (60 per cent digital immigrant, 40 per cent digital native). In terms of job roles, these broadly reflected the same functions as those who completed the survey in Research Phase One, as shown in Figure 5.7.

Figure 5.7 Respondents' job roles in Research Phase One and Research Phase Two





The next factor was the number of semi-structured interviews that would be required and this was less clear as there are varying guidelines for the sample size of qualitative semi-structured interviews. Glaser and Strauss (1967) recommended the concept of data saturation 'where no additional data are being found' (p. 61) - a notion echoed by Kvale and Brinkmann (2009, p. 113) who stated the interview number should be 'as many subjects as necessary to find out what you need to know'. Bryman and Bell concurred that the process should be 'sampling interviewees until your categories achieve theoretical saturation' (2011, pp. 491-492).

Whilst these constructs are reasonable in a qualitative setting, as this phase was concerned with understanding, they are not helpful for interview planning and thus additional guidance was sought, as shown in Table 5.4.

Table 5.4 Guidance for qualitative interview sample sizes from business literature

AUDIENCE	SUGGESTED SAMPLE SIZE	SOURCE
Homogenous population	4 to 12	Saunders *et al.* (2016)
Semi-structured interviews	5 to 25	Saunders *et al.* (2016)
Theory-based interviews	13: Minimum of 10 followed by a further 3	Francis *et al.* (2010)
Grounded theory	20 to 30	Creswell and Plano Clark (2018)

Therefore these researchers provided direction that the minimum number should be four interviews with a maximum of thirty. Those being interviewed were from a homogenous population of people working in marketing, yet they were semi-structured interviews, although no specific theory was being tested, as the aim was to explain the findings from Research Phase One. Hence a target number of 20 semi-structured interviews was established. Having an indication of the number to achieve, better facilitated interview planning.

5.4.4 Interview format

One-to-one synchronous interviews can be conducted face-to-face, or by telephone or online. The differences between these methods are discussed in this section.

Face-to-face interviews are argued as being flexible and providing better communication (De Leeuw, 2008) and greater rapport (Bryman and Bell, 2011). However, they can be expensive and take greater time to organise and complete (Sue and Ritter, 2007; De Leeuw, 2008).

Audio / telephone interviewing is regarded as common in traditional quantitative surveys and has been less used in qualitative research (Bryman and Bell, 2011), possibly as it is considered the domain of pollsters and market researchers (Block and Erskine, 2012). However it affords specific benefits in terms of cost-saving, time efficiency and further allows the participant to exit earlier if they wish (Bryman and Bell, 2011; Saunders *et al.*, 2016).

Use of the internet or Voice Over internet Protocol (VoIP) systems have been available for businesses for nearly two decades (Edwards, 2001) and the technology has evolved since the introduction of Skype, FaceTime and WhatsApp video calling. Interviews using technology such as Skype video have been described as 'a much more contemporary phenomenon' (Weller, 2017, p. 613) and have been compared to face-to-face interviews (Bryman and Bell, 2011) and 'may provide a certain level of comfort to participants' (Wilson, 2016, p. 48). James and Busher (2009) suggested that 'temporal co-presence intensifies online interactions, thereby creating an atmosphere where discussions can flourish' (p. 23).

However, it has been argued that computer-mediated communication offers a lesser degree of social presence (Short, Williams and Christie, 1976; Gunawardena, 1995) than an in-person discussion, although Weller (2017) discussed building rapport and ‘visible co-presence’ (p. 623) to mitigate the need for physical presence.

Previous research indicated issues with time lags and failing technology (Hay-Gibson, 2009; James and Busher, 2016) and that participants may not have Skype installed on their computer (Weinmann *et al.*, 2012). Another consideration is that online interviews are exclusively available to those with internet access (Sue and Ritter, 2007). These factors were not a concern as in this study the research was focused on those using social media at work and who had completed an online survey and thus had access to the internet. As a business system owned by Microsoft (Microsoft News Center, 2011), Skype was preferable to personal communications systems such as FaceTime or WhatsApp and more accessible in the work environment.

The different options which were considered comprised: face-to-face interviews, which have been recognised as a the ‘gold standard’ of interviewing (de Leeuw, 2008), although they are expensive and time-consuming; telephone discussions which are more common in structured interviews but, they have been applied less in qualitative studies (Block and Erskine, 2012); and Skype interviews, which provide greater informality of location, if the audience has access to the technology (Hanna, 2012).

Within a pragmatist ‘what works’ philosophy Creswell et al. (2011, p. 4), and following recommendations from Saunders *et al.* (2016), a factor was to consider the ‘appropriateness of the intended interview location’ (p. 403). Combined with gaining responses from more senior participants as access to managers at a convenient time can be challenging (Bryman and Bell, 2011), thus all options were made available to participants. This mixed-mode method provided participants with the ability to select their preferred interview format (meeting in person or speaking online via Skype) and ensured the desired number of semi-structured interviews was more likely to be achieved.

There are challenges with the mixed-mode interview method, for example: different options to facilitate and ensuring the consistency of interviews. Dillman (2000) suggested that potential errors with this approach would be measurement differences. However, this applied to a quantitative rather than a qualitative setting and was thus not valid. The consistency of interviews was managed using a topic guide as an outline and all participants were sent an electronic diary invitation for their confirmed interview, to better manage the administration of times, dates and places.

5.4.5 Interview plan

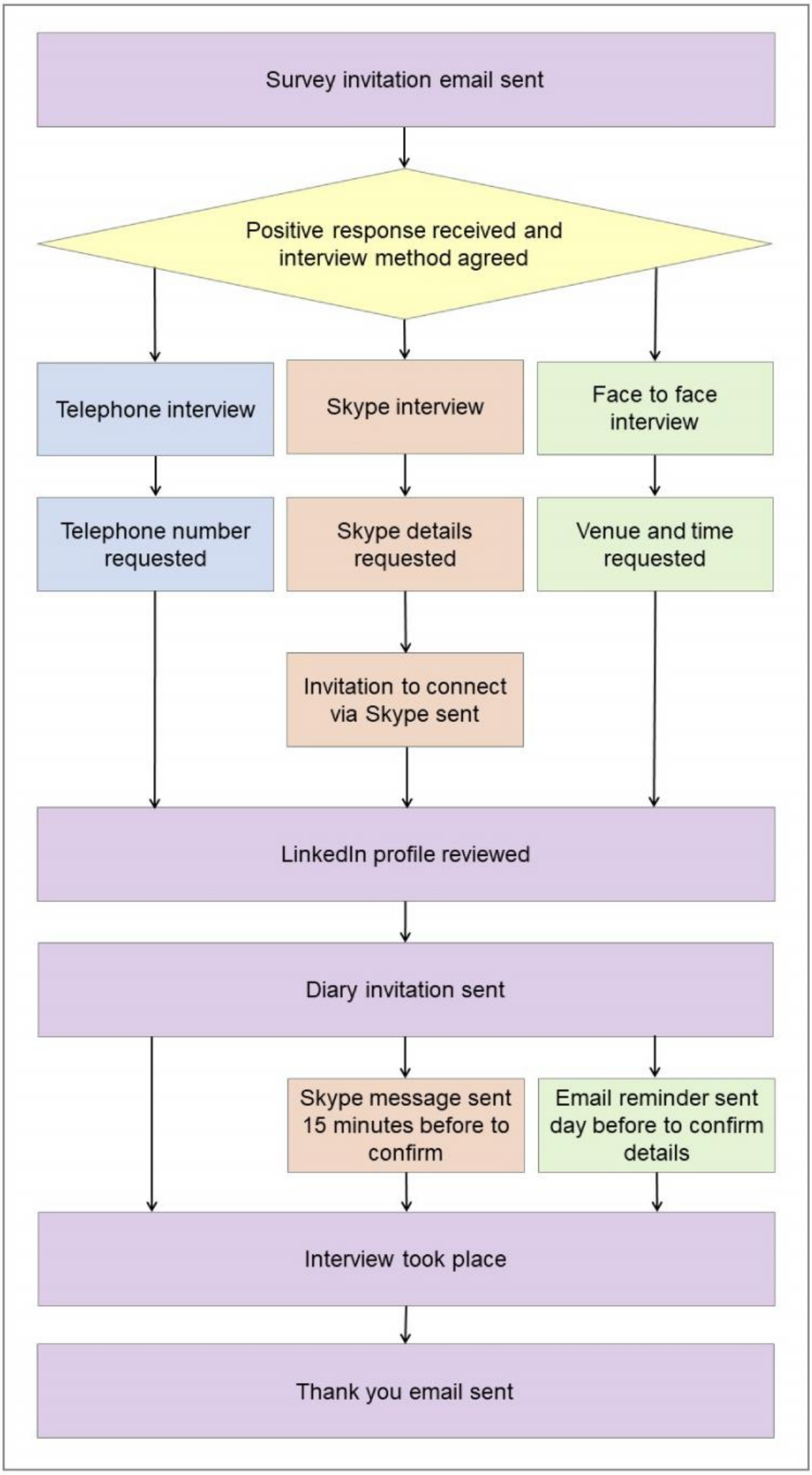
Once the mixed-mode method had been confirmed, all those in the sample frame were sent a personalised email by the researcher to arrange an interview (see Appendix G for an example).

The email was sent from the researcher's academic email address and started with a recap of the context ('last year you were kind enough to complete an online survey that's part of my research into the strategic use of social media for business') and explained the purpose of this research ('the survey identified some critical differences in the use of social media, so I am now exploring these issues further') and reminded the respondent why they were being contacted ('at the time, you ticked the box that said you'd be happy to help with more research and that's why I'm emailing you').

Weller (2017) argued that the communication method influenced the rapport between researcher and participant. In the initial email the respondent's help was requested as Petrovčič, Petrič and Lozar Manfreda (2016) found that a plea for help improved response rates ('I really need your help to complete this work'). The process was also explained ('there is nothing for you to prepare, just to answer some questions about the business use of social media').

Other steps were taken to build genuine rapport, which is critical for interviews (James and Busher, 2009): a second email confirming the details of the interview which thanked the participant and advised that an electronic diary invitation would be issued; electronic diary invitations, which both confirmed the details and re-substantiated that consent had been given, were shared between the researcher and participants; and LinkedIn profiles were explored so that the participant could verify the researcher’s credentials. After the interview, a thank-you email was sent. Figure 5.8 shows the different steps based on the interview method selected by the participant.

Figure 5.8 Research Phase Two - Semi-structured interview administration process



Finally, in the event that all respondents replied simultaneously, which would have created difficulties in scheduling interviews, emails were sent in batches of ten, each time to five digital natives and five digital immigrants. After a batch of emails was sent, subsequently no emails were sent for four days, whilst responses were awaited.

5.4.6 Instrument administration

Emails to participants were sent between 28 January and 2 March 2018 and of the 197 respondents from Research Phase One who agreed to participate in Research Phase Two, 87 were contacted. Two emails were undeliverable, 46 did not respond, twelve declined and 27 agreed to be interviewed. Although one respondent had to subsequently withdraw, resulting in 26 semi-structured interviews, this exceeded the desired number of 20. The semi-structured interviews were conducted between 8 February and 12 March 2018, all of which were recorded (with consent) using two of the three different systems at the same time, depending on the interview format, as shown in Table 5.5 and subsequently described.

Table 5.5 Research Phase Two - Semi-structured interviews recording processes and numbers of interview using these systems

INTERVIEW METHOD	**FACE-TO-FACE**	**SKYPE VIDEO**	**SKYPE AUDIO**	**TELEPHONE AUDIO**	**TOTALS**
TOTAL NO OF INTERVIEWS (N=)	3	6	16	1	26
RECORDING SYSTEM 1: LIVESCRIBE SMARTPEN (N=number of interviews recorded using this method)	3			1	4
RECORDING SYSTEM 2: EVAER (N=number of interviews recorded using this method)		6	16		22
RECORDING SYSTEM 3: IPHONE VOICE RECORDER (N=number of interviews recorded using this method)	3	6	16	1	26

Interviews took place between Monday and Friday. The earliest interview started at 09:30 with the latest at 19:30 and the three recording processes are described here.

Livescribe is a recording Smartpen (Anoto Group AB, 2018) that was designed for students to use in lecture theatres. It can be used to both record and take notes. It enables the researcher to review their notes and listen to the conversation at that specific time indicated in the notebook.

Evaer (Evaer, 2018) is Skype's recommended recording system which commences as soon as the call starts, recording both sides of the conversation.

The iPhone Voice Recorder (Tapmedia Ltd, 2018) is popular with journalists and resembles an old-fashioned tape-recorder so that in a face-to-face setting, participants are very aware of the recording. Two recording processes were used for all semi-structured interviews as a precaution against technological failure of one system.

The semi-structured interviews took 823 minutes (13 hours and 43 minutes). In the unedited state represented 340 pages of typed transcripts (1.5 line spacing) and totalled 88,604 words. The longest interview was 72 minutes and the shortest was 17 minutes; the average was 33.5 minutes. Whilst 26 individuals were interviewed, two of these involved colleagues and subsequently took place at the same time, resulting in 25 transcripts.

The mixed-mode semi-structured interviews comprised the following formats: Skype audio (n=16); Skype video (n=6); face-to-face (n=3); and telephone audio (n=1).

5.4.7 Topic guide

The interview type was explanatory to 'understand the relationships between variables' (Saunders *et al.*, 2016, p. 383) and the findings from Research Phase One contributed to a topic guide (see Appendix H) that was used in the semi-structured interviews.

The interview style was semi-structured and the topic guide provided a frame to prompt further discussion around the areas of significance, which were that digital natives are more likely to:

- Have formal marketing qualifications than digital immigrants
- Use social media for entertainment
- Use social media for reviews
- Use social media for customer service
- Manage social media interaction
- Use social media for brand recognition

- Integrate social media communication
- Measure results from social media
- Measure the value of social media
- Strategy and vision for social media management
- Resources for social media

The topic guide was further supported with the critical incident question used in the semi-structured interview process to obtain additional information.

5.4.8 Data analysis procedures

As the semi-structured interviews provided 340 pages of typed transcripts, a method was needed to classify and examine the connections and ideas put forward. Thematic analysis provided a method of fashioning the data in order that content that is meaningful and relevant to the research was gathered (Braun and Clarke, 2006). The themes were initially identified from the online survey and from this a framework was created for the question sets which provided specific areas of interest. Whilst this is a deductive approach (Yin, 2009) where the themes are *a priori*, rather than emerging from the data and could be perceived as potentially restrictive (Saunders *et al.*, 2016) within the qualitative nature of interviews, the coding allowed for other themes to emerge which are explored in more depth in this section.

Braun and Clarke described the phases of thematic analysis (2006, p. 87) and Table 5.6 shows how this was applied to this study and the following section provides more detail.

Table 5.6 Phases of thematic analysis

PHASE	DESCRIPTION OF THE PROCESS	APPLIED TO THIS STUDY
1. Familiarising yourself with your data	Transcribing data (if necessary), reading and re-reading the data, noting down initial ideas.	Data transcribed and listened to again.
2. Generating initial codes	Coding interesting features of the data in a systematic fashion across the entire data set, collating data relevant to each code.	Initial codes generated from online survey.
3. Searching for themes	Collating codes into potential themes, gathering all data relevant to each potential theme.	Initial codes added to data analysis software and additional codes identified.
4. Reviewing themes	Checking if the themes work in relation to the coded extracts (Level 1) and the entire data set (Level 2), generating a thematic 'map' of the analysis.	Themes checked with director of studies.
5. Defining and naming the themes	Ongoing analysis to refine the specifics of each theme, and the overall story analysis tells, generating clear definitions and names for each theme.	Ongoing analysis conducted during writing-up stage.
6. Producing the report	The final opportunity for analysis. Selection of vivid, compelling extract examples, final analysis of selected extracts, relating back of the analysis to the research question and literature, producing a scholarly report of the analysis.	Data selected and provided as examples in Chapter Seven.

Source: Braun and Clarke (2006).

Thematic analysis phase one – Familiarising yourself with your data

All recordings were securely stored electronically and subsequently transcribed by three individuals based in the UK that were recruited via PeoplePerHour (People Per Hour Ltd, 2018). They were sent the data securely through WeTransfer (WeTransfer, 2018) as the initial audio files were too large to email.

The three transcribers entered into non-disclosure agreements and confirmed that the recordings and all data were destroyed at the end of the project.

Each hour of interview data took between three to five hours to transcribe, depending on the length and the participant's accent. The transcripts were typed up in written style, thus pauses and other background noises were not included unless they stopped the interview.

The transcribers left some gaps where jargon was used or the transcriber did not understand the terminology in the recording. Therefore, following transcription a second listening of the audio whilst reading the transcription took place. This enabled the researcher to fill in the gaps. Subsequently, the audio was again reviewed with the transcripts to capture additional understanding, which Braun and Clarke (2006) describe as 'repeated reading … in an active way' (p. 87).

Thematic analysis phase two - Generating initial codes

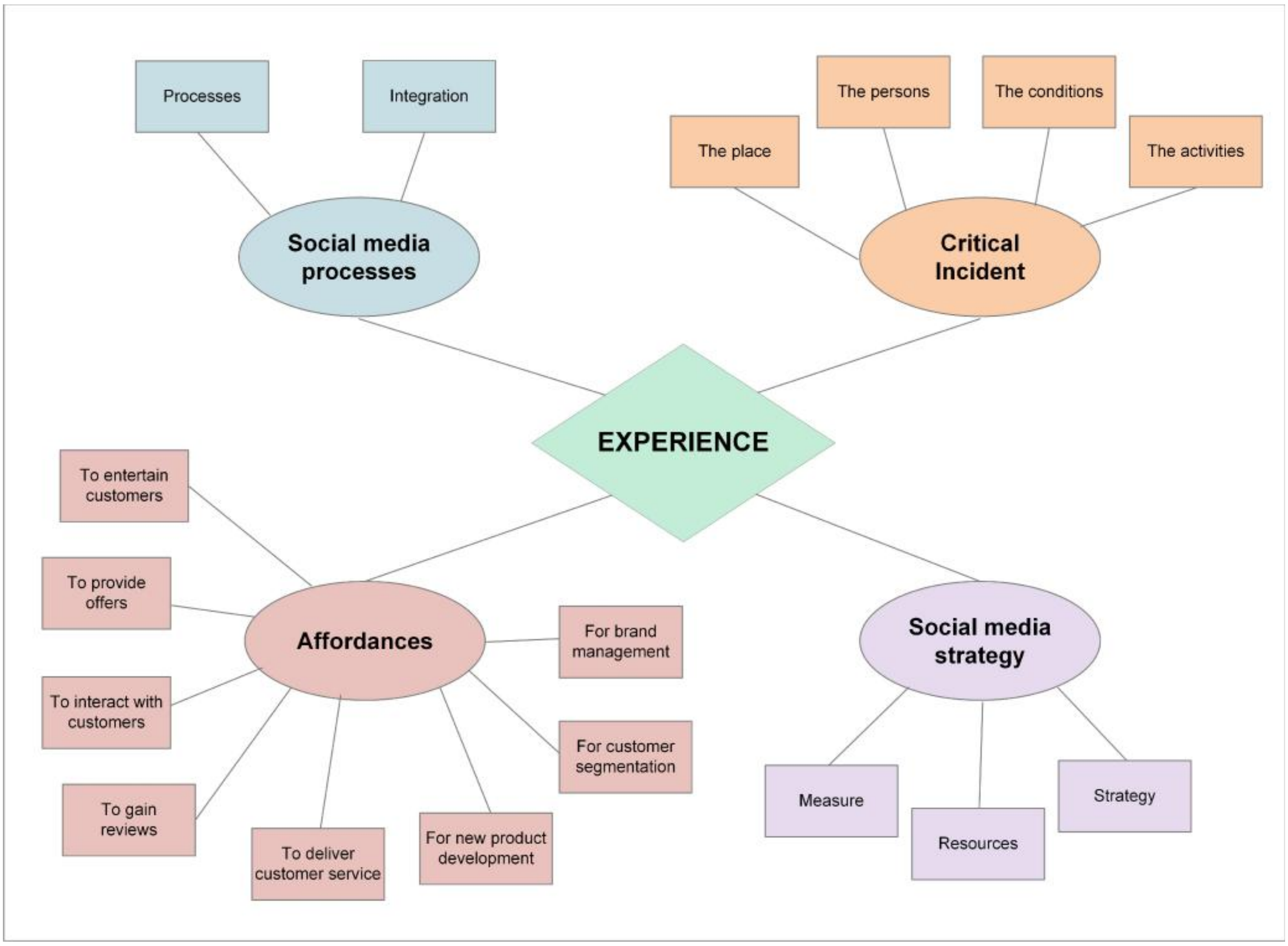
Once the semi-structured interviews were prepared, they were added to QSR NVivo 12 (QSR International Pty Ltd, 2018) as cases for analysis and for data storage. Once all cases were within the software system, auto-coding took place for the descriptive nodes including: generational cohort; gender; role; formal marketing qualifications; organisation type; interview format; and participant location.

Subsequently initial codes were created which started with the topic guide and other elements that were identified, such as 'fear of social media' and 'power of social media'. This resulted in a draft coding manual with 68 themes.

Thematic analysis phase 3 - Searching for themes

At this stage all transcripts had been reviewed at least twice and coded. One challenge was that the 68 themes were unwieldy and upon review, some only occurred in single transcripts. Thus the search for core themes commenced as the 68 initial themes were re-grouped into broader areas. Consequently, the themes were narrowed down and reduced to four areas: (i) affordances; (ii) social media processes; (iii) social media strategy and (iv) critical incident. Braun and Clarke (2006, p. 90) recommended the development of a 'thematic map' to identify the overarching or core themes with sub-themes, this was developed from the first thematic map in Figure 4.6 and is shown in Figure 5.9.

Figure 5.9 Developed thematic map (version 2) for Research Phase Two



The thematic analysis was conducted within each case and across the cases using QSR NVivo 12 (QSR International Pty Ltd, 2018). Themes were added as nodes within QSR NVivo 12 which enabled cross tabulation of cases and participants. Additional analysis was conducted using word searches, for example, in the area of social media strategy and measure, the words: metrics, measure, report, analytics, analyse and figures, were reviewed, to ensure all material had been coded at the right nodes.

Thematic analysis phase 4 - Reviewing themes

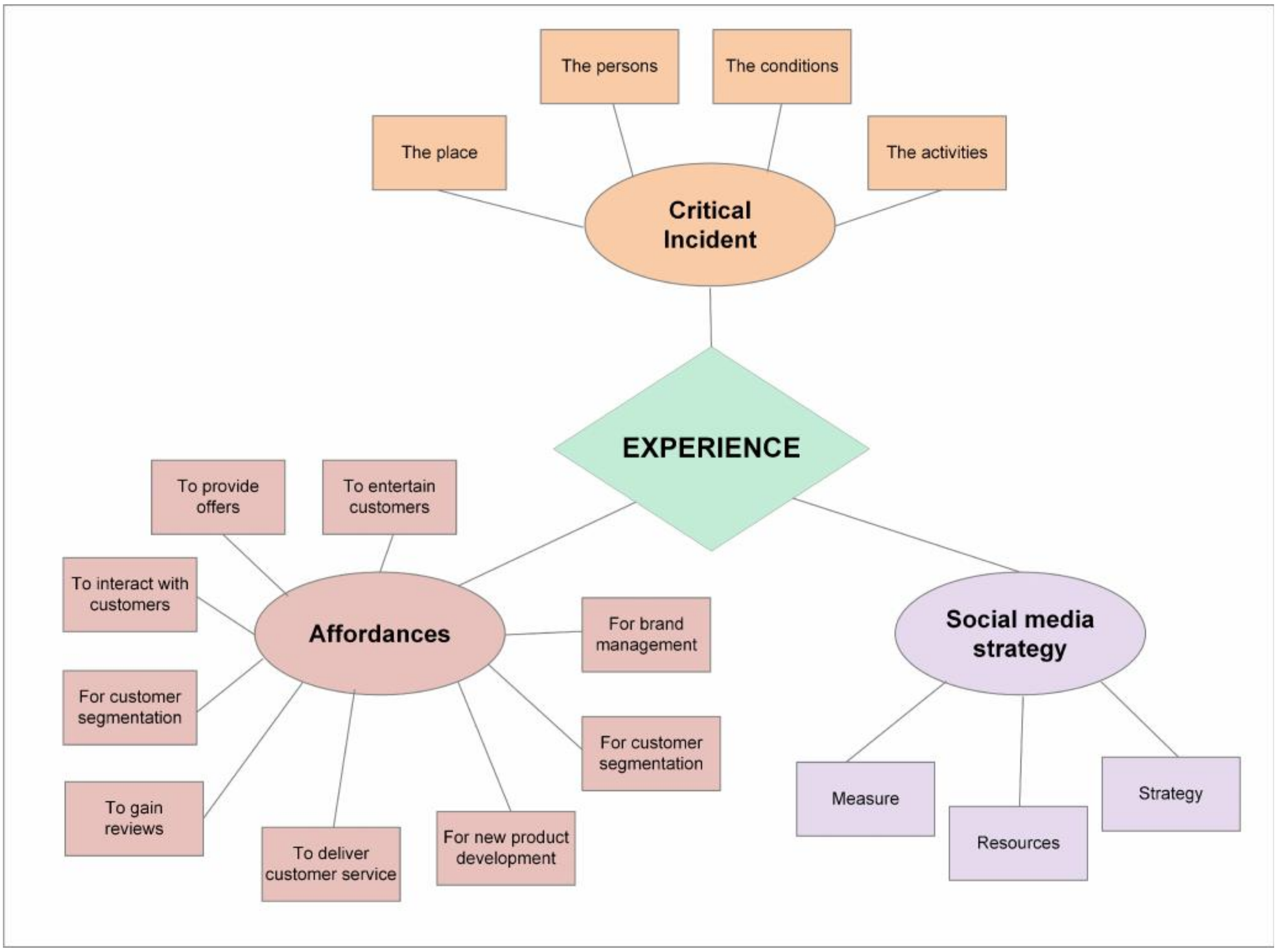
To review the themes, inter-coder reliability was sought with the director of studies and thus independent coding took place, for comparison against the researcher's own coding. The square root approach was used taking a selection of five of the 25 transcripts, representing those with and without formal marketing qualifications and in both generational cohorts.

The semi-structured interviews were printed and the researcher and director of studies compared the coding guide and agreed that no additional themes had emerged. The thematic map continued to be employed, thus Braun and Clarke (2006, p. 92) caution against 'coding data and generating themes… ad infinitum' and this was used as a reference to ensure additional and potentially duplicate themes were not added.

Thematic analysis phase 5 - Defining and naming the themes

Ongoing analysis was conducted during the writing-up stage and this resulted in a refined thematic map, shown in Figure 5.10. Social media processes did not feature as a significant theme. Several sub-themes were removed where they did not meet the final criterion by Braun and Clarke in the phases of thematic analysis (2006, p. 87) and did not provide 'vivid, compelling extract examples'.

Figure 5.10 Refined thematic map (version 3) for Research Phase Two



Thematic analysis phase 6 - Producing the report

The final phase was producing the report; the data for this is contained in Chapter Seven. Not all quotes were included from the participants, only those that added vivid examples and were non-repetitive.

5.4.9 Ethical considerations

The earlier ethical considerations related to protection of the data continued to apply to this second part of the research. To adhere to the agreed anonymity, all respondents' details were removed and the organisation name replaced with *name of organisation*. From this time onwards the semi-structured interviews and the files were referred to by their interview case number only.

5.5 Chapter conclusions

This contribution of this chapter has been to explain the processes for the two research phases and to demonstrate how the explanatory sequential fixed design, within a pragmatist ontology and epistemology, is applied as a mixed-method.

Other contributions have been to: define a set of primary job functions and sectors; and to assemble guidance for qualitative interview sample sizes from business literature; these elements can be used in other research.

An additional contribution is the generative finding of the notion of sampling within a digital setting. Taking Gorard's (2015) stance that a true probabilistic random sample 'must include every case' (p. 76), perhaps it is time for a new set of rules within computer-mediated surveys and the development of a quasi-random sample, where all those, from a closed list, that are sent an email, have an equal chance of participation. Whilst this is outside the scope of this study, this presents an opportunity for further debate and an addition to a research agenda.

The refined thematic map will contribute towards the investigation of understanding participants in Research Phase Two, semi-structured interviews.

Chapters six and seven will discuss the findings, firstly from the online survey and secondly from the semi-structured interviews. Subsequently Chapter Eight will integrate the findings as part of the mixed-methods approach.

Chapter Six: Research Phase One - Online Survey Findings

6.1 Chapter introduction

This chapter presents the results from phase one of the research - the online survey which sought to address Research Objective 2: ‘To conduct primary research in order to determine and evaluate current social media marketing application within organisations, and to explore three research questions:

- Are there differences in social media marketing application based on generational cohort?
- Are there differences in social media marketing application based on formal marketing qualifications?
- What are the significant differences?

The generational cohorts were classified by those born before and after 1980, using recognised terminology. Those born before 1980 have been termed digital immigrants and those born afterwards, named as digital natives (Prensky, 2001). Research Phase One was conducted in 2017 and therefore digital natives were those aged under 37 years and digital immigrants were aged 37 years or more, in that year.

The second factor was based on the presence of recognised marketing qualifications. Those with and studying for qualifications were classified as ‘with formal marketing qualifications’ and the remainder as those ‘without formal marketing qualifications’.

This section will present the results from Research Phase One, the online survey, and demonstrate areas of statistical significance for marketing academics and practitioners.

6.2 Statistical methods

The survey results were exported from SurveyMonkey (SurveyMonkey, 2018a) into Microsoft Excel for checking and imported into IBM SPSS Statistics, version 24 (IBM, 2017). As the data comprised categorical variables, it was subsequently analysed using descriptive statistics to generate contingency tables to display potential associations.

To assess whether there were associations between the categorical variables (i.e. the generational cohorts / formal marketing qualifications and social media actions), Pearson's chi-square (χ^2) test for association was employed (Pearson, 1900), which computes the observed and expected values. The test was based on the accepted alpha value = 0.05 as 'researchers normally work to a 95 per cent level of certainty' (Saunders *et al.*, 2016, p. 280).

In the datasets, where the category purpose contained three variables: (i) yes; (ii) no; and (iii) don't know, the researcher decided to clean the data further and re-coded the syntax for the 'don't know' variable (Ruel, Wagner and Gillespie, 2016). This enabled responses to be analysed both with and without the 'don't know' option as reported in this chapter.

Following the recommendation to embrace transparency in the GRAMMS guidelines (O'Cathain, Murphy and Nicholl, 2008), in questions where there were differences when the 'don't know' option was included, they are included in this chapter.

6.2.1 Effect sizes

To understand how meaningful any significant results may be ($p < 0.05$), effect sizes were considered based on the strength of the relationship. As the study used Pearson's chi-square (χ^2) test for association, the effect sizes were assessed using Cramér's V (ϕc) to 'measure the strength of association for contingency tables' (Ellis, 2010, p. 11) and further minimise the potential for errors.

In determining the effect size Cohen's criteria of 0.10 for small effect, 0.30 for medium effect and 0.50 for large effect were applied (Cohen, 1992).

6.2.2 Type I and Type II errors

Consideration was given to potential type I and type II errors. With a statistical significance level of < 0.05, the potential for type I (false positive) errors is increased, thus there is a risk of rejecting the null hypothesis when it should be confirmed. This is partly mitigated as the Pearson's chi-square (χ^2) test for association indicates when cells have a count of less than five and the potential for type I errors increases. When the cell count was fewer than five, the assumption was thus violated, adding a caution to the test results and these were not included in the results, in order not to generate type I errors.

Type II (false negative) errors are decreased as a statistical significance level of < 0.01 was not used.

6.3 Online survey response rate

A total of 756 surveys were returned of which nine respondents (1.9%) did not consent to their data being used and were withdrawn as they were thus ineligible. Fifty respondents (6.6%) did not use social media at work and were therefore ineligible and immediately exited from the survey. Subsequently, 246 respondents (32.9%) answered no further questions after question 3, thus providing 448 useable surveys which exceeded the desired response rate of 384 based on a 95 per cent confidence level and five per cent margin of error.

The link to the online survey was emailed to 89,453 people with marketing in their job role. Of those that started the survey, 59 were ineligible as they either did not consent or did not fit the scope of the survey, thus there were 89,394 potential respondents. The total response rate was therefore 0.5 per cent, as shown in Table 6.1.

Table 6.1 Total response rate calculation to Research Phase One

Total number of responses	448
Total number in sample less ineligible	89,453 – 59 = 89,394
Total response rate	0.5%

Compared with traditional postal surveys, 0.5 per cent may be considered low, reflecting upon the sample frame. However, this was not unexpected as discussed in Chapter Five (paragraph 5.3.4 potential bias and errors). Furthermore, a smaller response rate is no longer surprising in web-based surveys as the novelty of internet surveys has diminished (Sánchez-Fernández, Muñoz-Leiva and Montoro-Ríos, 2012) and there is over-surveying (Couper, 2000).

6.4 Respondents' demographic profiles

The 448 respondents represented a range of job roles with 149 in the C-suite (chief executive, chief marketing officer), 169 in manager roles, 55 specialists, 60 juniors and 15 academics, as shown in Figure 6.1.

Figure 6.1 Research Phase One - Respondents' jobs roles

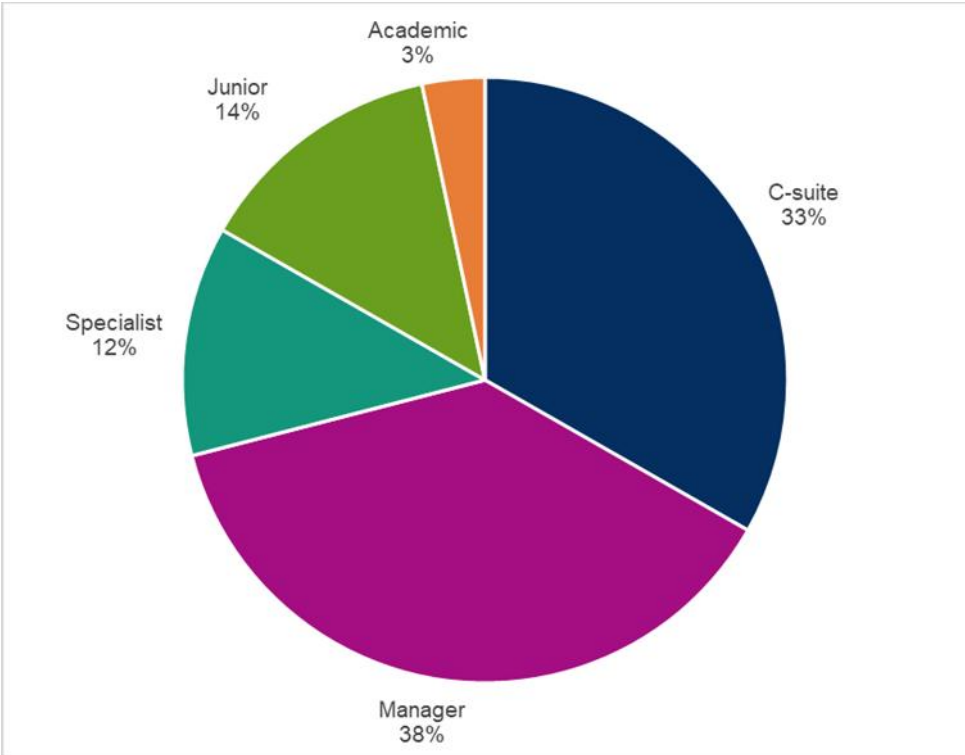


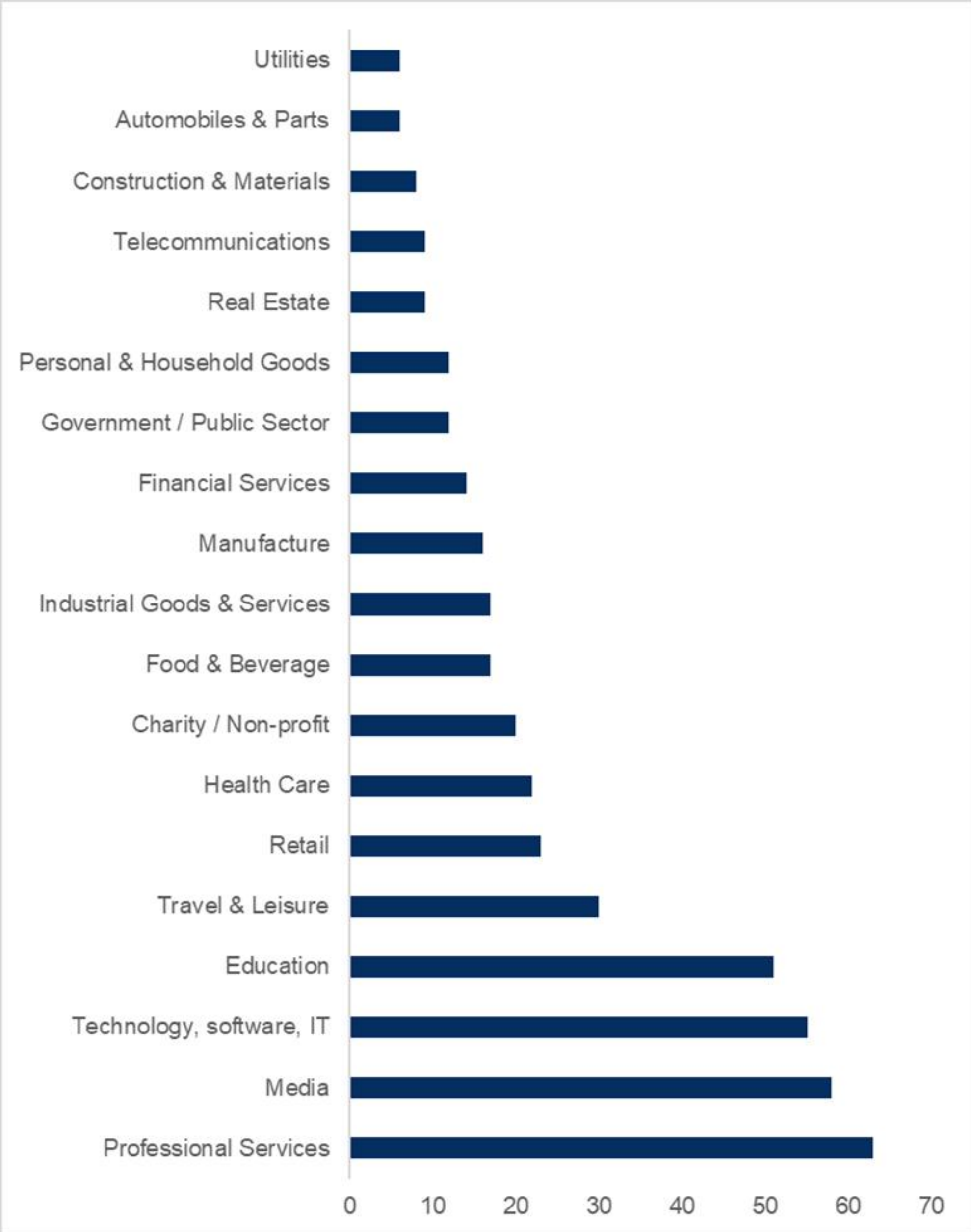
Table 6.2 shows that the job roles were across the generational cohorts although there were fewer people aged under 37 in the C-suite and more occupying the junior roles, as may be expected.

Table 6.2 Number of respondents in Research Phase Two viewed as digital natives and digital immigrants based on job roles

	DIGITAL NATIVE (AGED UNDER 37 YEARS)	**DIGITAL IMMIGRANT (AGED 37 YEARS OR MORE)**
Academic	2	13
C-suite	35	114
Junior	43	17
Manager	70	99
Specialist	27	28
Total	**177**	**271**

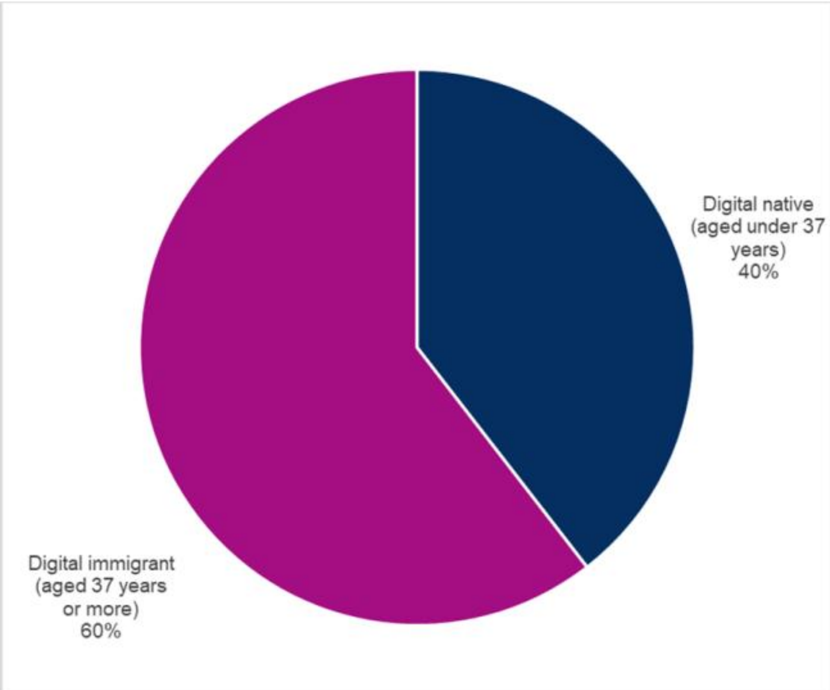
A range of sectors were represented with the smallest being utilities and automotive with 6 respondents in each and the largest being professional services with 63 respondents, as shown in Figure 6.2.

Figure 6.2 Research Phase One - Sectors represented by respondents



As the research question for this phase wished to explore the differences in social media usage based on two generational cohorts, respondents were asked to identify whether they were aged under 37 years, or 37 years or more. Some 60 per cent of respondents were aged 37 years or more and classified as digital immigrants with the remaining 40 per cent as digital natives, as Figure 6.3 illustrates.

Figure 6.3 Research Phase One – Respondents' ages classified by generational cohort



The next section presents the results of the analysis, which are all based on the sample data from Research Phase One, and illustrates where significant statistical association was found and where there was no difference between the groups.

It should be noted that the survey used the term purposes rather than affordances, in order not to confound the respondents. For consistency, in this section the reference is to purposes, as per the survey questions. Furthermore, other than the personal demographic data, the responses in this section are within the context of the organisation, not the individual.

6.5 Generational cohorts and formal marketing qualifications

A further consideration was whether the respondents had formal marketing qualifications, which were considered to be: (i) certificates or diplomas from Chartered Institute of Marketing (CIM); (ii) certificates or diplomas from the Institute of Direct and Digital Marketing (IDM); (iii) bachelor's (BA, BSc) degree in marketing or a related area; (iv) master's degree in marketing or related area; and (v) specialist digital qualifications. At the analysis stage, those with these formal marketing qualifications were coded as '1' and those without as '2'.

With two dichotomous variables, a test of the two cohorts was undertaken and Figure 6.4 shows the hypotheses.

Figure 6.4 Null and alternative hypotheses for the presence and absence of formal marketing qualifications within digital natives and digital immigrants

$H0: C_1 - C_2 = 0$

- The null hypothesis considered that within the sample, there is no significant difference between digital natives and digital immigrants and between the presence and absence of formal marketing qualifications (where C_1 represents digital natives and C_2 represents digital immigrants).

$H1: C_1 - C_2 \neq 0$

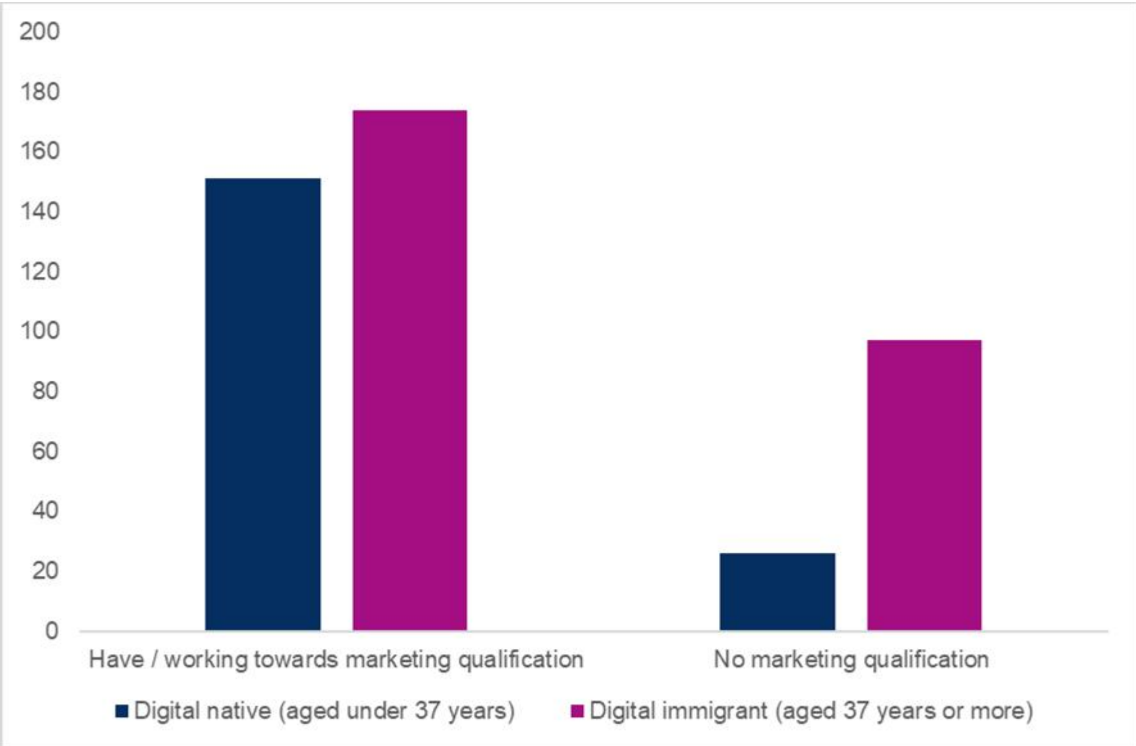
- The alternative hypothesis was considered that within the sample, there is a significant difference between digital natives and digital immigrants and between the presence and absence of formal marketing qualifications (where C_1 represents digital natives and C_2 represents digital immigrants).

Finding 1 - Digital natives are more likely to have formal marketing qualifications than digital immigrants

There was a statistically significant association between the generational cohorts and their formal marketing qualifications $\chi^2(1) = 23.942$, $p = 0.001$. The Cramér's V effect size was medium (ϕc 0.231, $p = 0.001$) and thus the null hypothesis was rejected due to the results, as 151 out of 177 (85.3%) of digital natives possessed or were working towards securing formal marketing qualifications, compared to 174 out of 271 (64.2%) of digital immigrants.

Only 26 of the category digital natives did not have formal marketing qualifications compared to 97 within the digital immigrants category. Hence the proportion of people working in marketing with formal marketing qualifications is 0.85 for digital natives and 0.64 for digital immigrants, which is a difference in proportions of 0.2 (0.85 – 0.64 = 0.2), as shown in Figure 6.5.

Figure 6.5 Research Phase One - Generational cohorts and presence or absence of formal marketing qualifications between digital natives and digital immigrants



6.6 Differences in generational cohorts

6.6.1 Social media purposes by generational cohorts

To investigate differences within the generational cohorts around the purposes of social media, respondents were asked (Q5) ‘for which of the following purposes does your organisation use social media?’

This section will illustrate the findings with two independent variables (digital native, digital immigrant) and polytomous dependent variables, the Pearson’s chi-square (χ^2) test for association was performed throughout this section.

The hypotheses for question 5 are presented in Figure 6.6.

Figure 6.6 Null and alternative hypotheses for purposes of social media within digital natives and digital immigrants

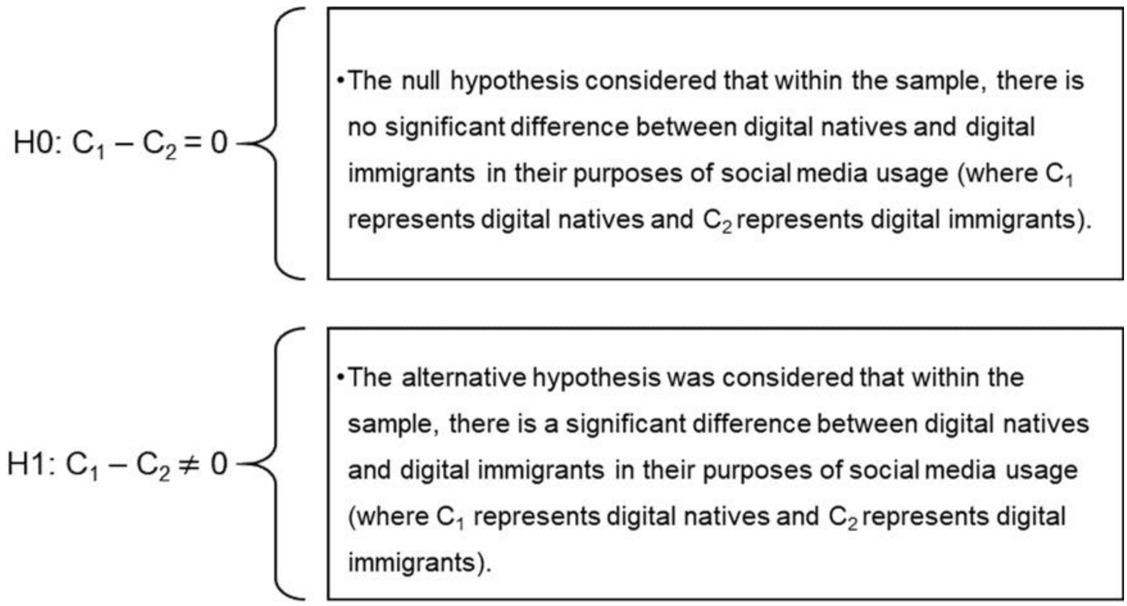


Table 6.3 shows where the null hypothesis was retained, with no significant statistical association (χ^2, p >0.05) between the generational cohorts and certain purposes of social media usage, in their organisation.

Table 6.3 Research Phase One - Where no significant statistical association was found between the generational cohorts and various purposes ordered by chi-square results

PURPOSE	NULL HYPOTHESES RETAINED
To develop an online community	More than 73 per cent of respondents (n=435) in both groups (digital natives = 174, digital immigrants = 261) answered 'yes' that developing an online community was a purpose of social media usage: $\chi^2(1)$, p = 0.929.
To interact with customers and stakeholders	More than 92 per cent of respondents (n=444) in both groups (digital natives = 177, digital immigrants = 267) answered 'yes' that interaction was a purpose of social media usage: χ^2 (1), p = 0.840.
To provide information	More than 98 per cent of respondents (n=447) in both groups (digital natives = 170, digital immigrants = 270) answered 'yes' that provision of information was a purpose of social media usage: χ^2 (1), p = 0.548.
To communicate	More than 96 per cent of respondents (n=447) in both groups (digital natives = 177, digital immigrants = 270) answered 'yes' that using social media for communication was a purpose of social media in their organisation: χ^2 (1), p = 0.391.
To gain customer feedback	More than 58 per cent of respondents (n=435) in both groups (digital natives = 173, digital immigrants = 262) answered 'yes' that provision of feedback was a purpose of social media usage: χ^2 (1), p = 0.550.
To sell	More than 55 per cent of respondents (n=441) in both groups (digital natives = 175, digital immigrants = 266) answered 'yes' that to sell was a purpose of social media usage: χ^2 (1), p = 0.387.
To gain brand recognition	More than 94 per cent of respondents (n=443) in both groups (digital natives = 176, digital immigrants = 267) answered 'yes' that using social media to gain brand recognition was a purpose of social media in their organisation: χ^2 (1), p = 0.168.

However, the null hypothesis was rejected and the alternative hypothesis accepted as statistical significance was found in these four purposes of social media usage: entertainment, offers, reviews, and service, as summarised in Table 6.4 and subsequently detailed in this section.

Table 6.4 Research Phase One - Generational cohorts and various purposes where statistical significance was found and ordered by effect sizes shown using Cramér's V (ϕc)

PURPOSE OF SOCIAL MEDIA	STATISTICALLY SIGNIFICANT ASSOCIATION FINDING WITHIN GENERATION COHORTS AND THE CRAMÉR'S V EFFECT SIZE
To entertain customers	$\chi^2(1) = 13.931$, p = 0.001. The effect size was small (ϕc 0.179, p = 0.0001).
To deliver customer service	$\chi^2(1) = 9.453$, p = 0.002. The effect size was small (ϕc 0.148, p = 0.002).
To gain (product) reviews	$\chi^2(1) = 7.494$, p = 0.001. The effect size was small (ϕc 0.131, p = 0.006).
To provide offers	$\chi^2(1) = 3.909$, p = 0.048. The effect size was very small (ϕc 0.095, p = 0.048).

Finding 2 – Digital natives are more likely to use social media to entertain customers

There was a statistically significant association between the generational cohorts and their use of social media for entertainment $\chi^2(1) = 13.931$, p = 0.001. The Cramér's V effect size was small (ϕc 0.179, p = 0.0001) and thus the null hypothesis was rejected with a sample number of 433 (digital natives = 170, digital immigrants = 263) and as 110 out of 170 (64.7%) of digital natives used social media within their organisation for the purpose of entertainment, compared to 122 out of 263 (46.4%) of digital immigrants.

Only 60 of the category digital natives (n=170) did not use social media for the purpose of entertainment compared to 141 (n=263) within the digital immigrants' category. Hence the proportion using social media for entertainment is 0.64 for digital natives and 0.46 for digital immigrants which is a difference of 0.2 (0.64 – 0.46 = 0.18).

Finding 3 – Digital natives are more likely to use social media to deliver customer service

There was a statistically significant association between the generational cohorts (digital natives = 175, digital immigrants = 259) and their use of social media for customer service $\chi^2(1) = 9.453$, $p = 0.002$. The Cramér's V effect size was small (ϕc 0.148, $p = 0.002$). Thus the null hypothesis was rejected, as 112 out of 175 (64%) of digital natives used social media within their organisation for the purpose of delivering customer service, compared to 127 out of 259 (49%) per cent of digital immigrants.

The sample number was 434 and only 63 (36%) of digital natives did not use social media for the purpose of customer service compared to 132 (51%) digital immigrants. Hence the proportion using social media for customer service is 0.64 for digital natives and 0.49 for digital immigrants which is a difference in proportions of 0.1 (0.64 – 0.49 = 0.15).

Finding 4 – Digital natives are more likely to use social media to gain (product) reviews

There was a statistically significant association between the generational cohorts (digital natives = 173, digital immigrants = 261) and their use of social media for reviews $\chi^2(1) = 7.494$, $p = 0.001$. The Cramér's V effect size was small (ϕc 0.131, $p = 0.006$). The null hypothesis was rejected as 76 out of 173 (43.9%) digital natives used social media within their organisation for the purpose of gaining reviews, compared to 81 out of 261 (31%) digital immigrants; the sample number was 434.

In this area 97 digital natives (56.1%) did not use social media for the purpose of reviews compared to 180 (69%) digital immigrants. Hence the proportion of people working in marketing using social media for reviews is 0.43 for digital natives and 0.31 for digital immigrants, a difference in proportion of 0.1 (0.43 – 0.31 = 0.12).

Finding 5 - Digital natives are more likely to use social media for offers

There was a statistically significant association between the generational cohorts and the use of offers in social media $\chi^2(1) = 3.909$, $p = 0.048$. The Cramér's V effect size was very small (ϕc 0.095, $p = 0.048$) and thus the null hypothesis was rejected, as 106 out of 175 (60.6%) of digital natives used social media within their organisation for the purpose of providing offers compared to 133 out of 261 (51.0%) of digital immigrants.

Within the sample (n=436) only 69 of the category digital natives (n=175) did not use social media for the purpose of offers compared to 128 within the digital immigrants' category (n=261). Hence the proportion using social media for offers is 0.60 for digital natives and 0.51 for digital immigrants which is a difference of 0.09 (0.60 – 0.51 = 0.09).

6.6.2 Social media processes by generational cohorts

The hypotheses for social media processes are shown in Figure 6.7.

Figure 6.7 Null and alternative hypotheses for the social media processes which apply to their organisation within digital natives and digital immigrants

$H0: C_1 - C_2 = 0$

- The null hypothesis considered that within the sample, there is no significant difference between digital natives and digital immigrants in the social media processes which apply to their organisation (where C_1 represents digital natives and C_2 represents digital immigrants).

$H1: C_1 - C_2 \neq 0$

- The alternative hypothesis was considered that within the sample, there is a significant difference between digital natives and digital immigrants in the social media processes which apply to their organisation (where C_1 represents digital natives and C_2 represents digital immigrants).

The null hypothesis was retained, with no statistical association (χ^2, p >0.05) between the generational cohorts and the social media processes shown in Table 6.5.

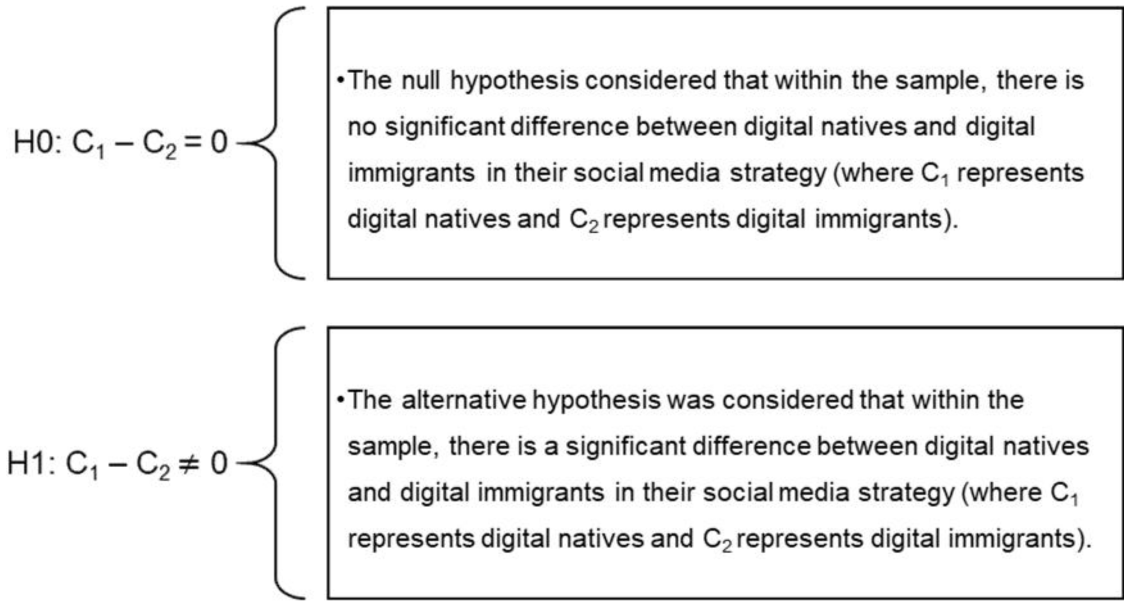
Table 6.5 Research Phase One - Where no significant association was found between the generational cohorts and social media processes ordered by chi-square results

PROCESSES	NULL HYPOTHESES RETAINED
Social media activities are connected	The sample number was 429 and more than 81 per cent of respondents in both groups (digital natives = 171, digital immigrants = 258) answered 'yes' that their organisation's social media activities were connected to their business processes: $\chi^2(1)$, p > 0.859.
Social media activity focuses on our customers or our products / services	The sample number was 439 and more than 93 per cent of respondents in both groups (digital natives = 175, digital immigrants = 264) answered 'yes' that their organisation's social media activities were focused on their customers or processes: χ^2 (1), p = 0.319.
Social media communications are integrated	The sample number was 426 and more than 79 per cent of respondents in both groups (digital natives = 167, digital immigrants = 259) answered 'yes' that their organisation's social media communications were integrated: $\chi^2(1)$, p = 0.091.

6.6.3 Social media strategy by generational cohorts

The Pearson's chi-square (χ^2) test for association was again used and the 'don't know' responses are reported in this section where there were higher numbers of don't know responses which resulted in sample sizes below 400. Thus two sets of analyses were performed throughout this section for (a) Yes and No responses only and (B) Yes, No and Don't Know responses. In terms of social media strategy, the hypotheses are shown in Figure 6.8.

Figure 6.8 Null and alternative hypotheses for social media strategy within digital natives and digital immigrants



The null hypothesis was retained, with no statistical association (χ^2, p >0.05) between the generational cohorts in their organisations and the following aspects of social media strategy shown in Table 6.6.

Table 6.6 Research Phase One - Where no significant association was found between the generational cohorts and social media strategy ordered by chi-square results

STRATEGY	NULL HYPOTHESES RETAINED
Considered initial set-up cost and the ongoing maintenance costs when selecting social media channels	The sample number was 387 and more than 68 per cent of respondents in both groups (digital natives = 149, digital immigrants = 238) answered ’yes’ that when selecting social media channels they had considered the initial set-up cost and the ongoing maintenance costs. There was no significant association between the generational cohorts: $\chi^2(1)$, p = 0.964. There were 61 ‘don’t know’ responses, bringing the total number of respondents to this question to 448, although there was no significant association: $\chi^2(2)$, p = 0.546.

STRATEGY	NULL HYPOTHESES RETAINED
Reflect on the performance of the social media activity	The sample number was 427 and more than 82 per cent of respondents in both groups (digital natives = 171, digital immigrants = 256) answered ’yes’ that they reflected on the performance of the social media activity. There was no significant association between the generational cohorts: $\chi^2(1)$, p = 0.788. There were 21 ‘don’t know’ responses, bringing the total number of respondents to this question to 448, although there was no significant association: $\chi^2(2)$, p = 0.556.
Considered potential risks before using social media	The sample number was 415 and more than 82 per cent of respondents in both groups (digital natives = 162, digital immigrants = 253) answered ’yes’ that they considered potential risks before using social media. There was no significant association between the generational cohorts: $\chi^2(1)$, p = 0.489. There were 33 ‘don’t know’ responses, bringing the total number of respondents to this question to 448, although there was no significant association: $\chi^2(2)$, p = 0.605.
Clear strategy and vision for social media management	The sample number was 439 and more than 69 per cent of respondents in both groups (digital natives = 175, digital immigrants = 264) answered ’yes’ that they had a clear strategy and vision for social media management. There was no significant association between the generational cohorts: $\chi^2(1)$, p = 0.436. There were nine ‘don’t know’ responses, bringing the total number of respondents to this question to 448, although there was no significant association: $\chi^2(2)$, p = 0.415.
Carried out research before using social media	The sample number was 395 and most respondents in both groups (digital natives = 154, digital immigrants = 241) answered ’yes’ that before they started using social media, they had carried out some research. Although 60.4 per cent of digital natives and 55.6 per cent of digital immigrants said they had conducted research, there was no significant association between the generational cohorts: $\chi^2(1)$, p = 0.348. There were 53 ‘don’t know’ responses, bringing the total number of respondents to this question to 448, although there was no significant association: $\chi^2(2)$, p = 0.533.

STRATEGY	NULL HYPOTHESES RETAINED
Clear objectives in place for social media management	The sample number was 434 and more than 67 per cent of respondents in both groups (digital natives = 174, digital immigrants = 260) answered 'yes' that they had clear objectives in place for social media management. There was no significant association between the generational cohorts: $\chi^2(1)$, p = 0.203. There were fourteen 'don't know' responses, bringing the total number of respondents to this question to 448, although there was no significant association: $\chi^2(2)$, p = 0.165.

Partial finding - Manage all social media interaction

(a) Yes and No responses only

The sample number was 429 and more than 90 per cent of respondents in both groups (digital natives = 173, digital immigrants = 256) answered 'yes' that they managed all social media interaction. In this case, there was no significant association between the generational cohorts: $\chi^2(1)$, p = 0.066.

(b) Yes, No and Don't Know responses

However, there were 19 'don't know' responses, bringing the total number of respondents to this question to 448 and in this case there was a significant association: $\chi^2(2) = 6.227$, p = 0.044 between the management of social media interaction by generational cohort (digital natives = 177, digital immigrants = 271). The Cramér's V effect size was small (ϕc 0.118, p = 0.044). Thus the null hypothesis was rejected, as 165 out of 177 (93.2%) digital natives managed all social media interaction, compared to 232 out of 271 (85.6%) digital immigrants.

Within the digital natives, 4.5 per cent (n=8) did not manage social media interaction and 2.3 per cent (n= 4) did not know, compared to 8.9 per cent (n=24) of digital immigrants who did not manage social media interaction and 5.5 per cent (n=15) did not know.

Partial finding - Measure the value of social media

(a) Yes and No responses only

More than 71 per cent of respondents in both groups answered 'yes' that they measured the value of social media. There was no significant association between the generational cohorts: $\chi^2(1)$, p = 0.051. The sample number was 426 (digital natives = 172, digital immigrants = 254).

(b) Yes, No and Don't Know responses

However, there were 22 'don't know' responses, bringing the total number of respondents to this question to 448 and in this case, there was a significant association: $\chi^2(2) = 6.570$, p = 0.037 between the measurement of the value of social media by generational cohort (digital natives = 177, digital immigrants = 271). The Cramér's V effect size was small (ϕc 0.121, p = 0.037).

Thus the null hypothesis was rejected as 137 out of 177 (77.4%) digital natives managed all social media interactions, compared to 181 out of 271 (66.8%) digital immigrants. Within the digital natives 19.8 per cent (n=35) did not manage social media interaction and 2.8 per cent (n=5) did not know, compared to 26.9 per cent (n=73) of digital immigrants who did not manage social media interaction and 6.3 per cent (n=17) who did not know.

Partial finding - Measure results from social media

(a) Yes and No responses only

There was a statistically significant association between generational cohorts (digital natives = 169, digital immigrants = 259) and their measurement of social media: $\chi^2(1) = 8.615$, p = 0.003. The Cramér's V effect size was small (ϕc 0.142, p = 0.003) thus the null hypothesis was rejected, as 153 out of 169 (90.5%) digital natives measured results from social media, compared to 207 out of 259 (79.9%) digital immigrants.

The sample number was 428 and 16 digital natives did not measure results from social media compared to 52 digital immigrants. Hence, the proportion of people working in marketing and measuring results from social media is 0.90 for digital natives and 0.79 for digital immigrants, which is a difference in proportions of 0.1 (0.90 – 0.79 = 0.11).

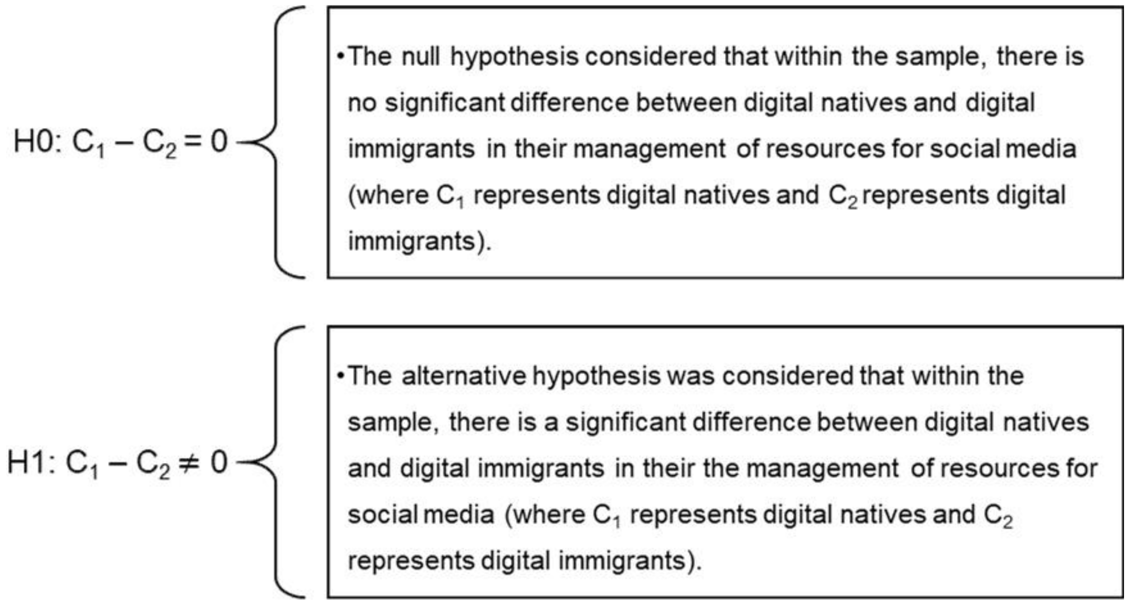
(b) Yes, No and Don't Know responses

There were 21 'don't know' responses, bringing the total number of respondents to this question to 448, although in this case, where the sample was larger, there was no significant association between the generational cohorts: $\chi^2(2)$, $p = 0.556$.

6.6.4 Social media management by generational cohorts

The management of resources for social media was considered and Figure 6.9 shows the hypotheses.

Figure 6.9 Null and alternative hypotheses for the management of resources for social media within digital natives and digital immigrants



The null hypothesis was retained, with no statistical association (χ^2, $p > 0.05$) between the generational cohorts and the management of resources for social media in the areas shown in Table 6.7.

Table 6.7 Research Phase One - Where no significant association was found between the generational cohorts and the management of resources for social media ordered by chi-square results

STRATEGY	NULL HYPOTHESES RETAINED
We have some people in-house to manage social media and some external support from a consultant, agency, or other third party	The sample number was 431 and there was little difference as over 43 per cent of respondents in both groups (digital natives = 171, digital immigrants = 260) answered 'yes' that they had a mixed management model with some people in-house to manage social media and some external support. There was no significant association between the generational cohorts: $\chi^2(1)$, p = 0.903.
Our organisation needed more skills to manage our social media	There was no significant statistical association between the generational cohorts: $\chi^2(1)$, p = 0.635. The sample number was 433 (digital natives = 169, digital immigrants = 264) and more than 76 per cent of respondents in both groups answered 'yes' that they needed more skills to manage social media.
We contract out management of social media	The sample number was 428 and over 22 per cent of respondents in both groups (digital natives = 168, digital immigrants = 260) answered 'yes' that they contracted out the management of social media. Digital natives were somewhat more likely to contract out at 29.2 per cent, but in both cases over 70 per cent did not contract out the management of social media and overall there was no significant association between the generational cohorts: $\chi^2(1)$, p = 0.132.

However, the null hypothesis was rejected and the alternative hypothesis accepted as statistical significance was found between digital natives and digital immigrants for the following aspects of social media management which are ordered by Cramér's V effect size.

Finding 6 – Digital natives are more likely to have internal staff managing social media

There was a statistically significant association between generational cohorts and their internal management of social media $\chi^2(1) = 4.454$, p = 0.035. The Cramér's V effect size was small (ϕc 0.101, p = 0.035).

The null hypothesis was rejected, as 164 out of 175 (93.7%) digital natives stated that they had people inside the organisation to manage social media, compared to 232 out of 265 (87.5%) digital immigrants. The sample number was 440 (digital natives = 175, digital immigrants = 265). Therefore digital natives are more likely to say that they have people inside their organisation managing social media.

Of the digital natives 6.3 per cent (n=11) did not manage social media internally compared to 12.5 per cent of digital immigrants (n=33). Hence the proportion of people working in marketing and managing social media internally is 0.93 for digital natives and 0.87 for digital immigrants, which is a difference in proportion of 0.06 (0.93 – 0.87 = 0.06).

Finding 7 - Digital natives are more likely to allocate extra resources to use social media

There was a statistically significant association between generational cohorts and their allocation of extra resources to social media: $\chi^2(1) = 4.044$, $p = 0.044$. The Cramér's V effect size was very small (ϕc 0.097, $p = 0.044$).Therefore the null hypothesis was rejected, as 113 out of 166 (68.1%) of digital natives stated that they had to allocate extra resources to use social media compared to 153 out of 262 or 58.4 per cent of digital immigrants. The sample number was 428 (digital natives = 166, digital immigrants = 262).

Of the digital natives 31.9 per cent (n=53) did not have to allocate extra resources to use social media compared to 41.6 per cent of digital immigrants (n=109). Hence the proportion of people working in marketing and allocating extra resources is 0.68 for digital natives and 0.58 for digital immigrants which is a difference in proportion of 0.1 (0.68 – 0.58 = 0.1).

6.7 Differences based on presence or absence of formal marketing qualifications

This section presents the results where the independent variable of formal marketing qualifications was applied. With two independent variables (with formal marketing qualifications, without formal marketing qualifications) and polytomous dependent variables, the Pearson's chi-square (χ^2) test for association was again undertaken.

6.7.1 Social media purposes based on presence or absence of formal marketing qualifications

The hypotheses for the purposes of social media usage are shown in Figure 6.10.

Figure 6.10 Null and alternative hypotheses for purposes of social media between those with and without formal marketing qualifications

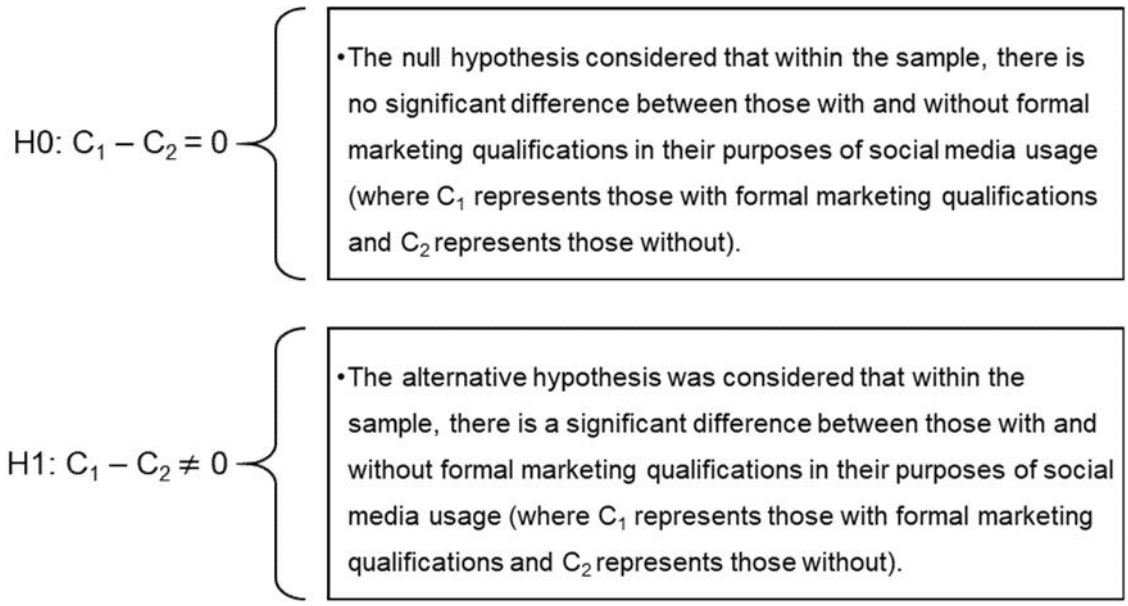


Table 6.8 shows that the null hypothesis was retained, with no statistical association (χ^2, $p > 0.05$) between those with and without formal marketing

qualifications and the following purposes of social media usage in their organisation.

Table 6.8 Research Phase One - Where no significant association was found between the generational cohorts and various purposes ordered by chi-square results

PURPOSE	NULL HYPOTHESES RETAINED
To develop an online community	More than 70 per cent of respondents (n=435) in both groups (with formal marketing qualifications = 318, without formal marketing qualifications = 117) answered ’yes’ that developing an online community was a purpose of social media usage. Therefore there was no significant association between those with and without formal marketing qualifications and ’purpose community’: $\chi^2(1)$, p = 0.412.
To provide information	More than 97 per cent of respondents (n=447) in both groups (with formal marketing qualifications = 325, without formal marketing qualifications = 122) answered ’yes’ that provision of information was a purpose of social media usage. Therefore there was no significant association between those with and without formal marketing qualifications and ’purpose information’: $\chi^2(1)$, p = 0.351.
To sell	More than 55 per cent of respondents (n=441) in both groups (with formal marketing qualifications = 321, without formal marketing qualifications = 120) answered ’yes’ that to sell was a purpose of social media usage. Therefore there was no significant association between those with and without formal marketing qualifications and ’purpose sell’: $\chi^2(1)$, p = 0.310.
To communicate	More than 95 per cent of respondents (n=447) in both groups (with formal marketing qualifications = 324, without formal marketing qualifications = 123) answered ’yes’ that using social media for communication was a purpose of social media in their organisation. Therefore there was no significant association between those with and without formal marketing qualifications and ’purpose communicate’: $\chi^2(1)$, p = 0.192.
To provide offers	Although using social media to provide offers was significant within the generational cohorts, there was no significant association between those with and without formal marketing qualifications. More than 49 per cent of respondents (n=436) in both groups (with formal marketing qualifications = 316, without formal marketing qualifications = 120) answered ’yes’ that to provide offers was a purpose of social media usage: $\chi^2(1)$, p = 0.144.

PURPOSE	NULL HYPOTHESES RETAINED
To gain (product) reviews	Although using social media to gain reviews was significant within the cohorts, there was no significant association between those with and without formal marketing qualifications: $\chi^2(1)$, p = 0.099. However those with qualifications were more likely to say 'yes' that they used social media to gain reviews (38.5%) compared to those without formal marketing qualifications (29.9%). The sample number was 434 and more than 61 per cent of respondents in both groups (with formal marketing qualifications = 317, without formal marketing qualifications = 117) answered 'no' that gaining reviews was not a purpose of social media usage.

However, the null hypothesis was rejected and the alternative hypothesis accepted as statistical significance was found in these five purposes of social media usage: to entertain customers; to interact with customers and stakeholders; to gain brand recognition; to gain customer feedback; and to deliver customer service, as summarised in Table 6.9 and subsequently detailed in this section.

Table 6.9 Research Phase One - Those with and without formal marketing qualifications and various purposes where statistical significance was found and ordered by effect sizes shown using Cramér's V (ϕc)

PURPOSE OF SOCIAL MEDIA	STATISTICALLY SIGNIFICANT ASSOCIATION FINDING BETWEEN THOSE WITH AND WITHOUT FORMAL MARKETING QUALIFICATIONS AND THE CRAMÉR'S V EFFECT SIZE
To interact with customers and stakeholders	$\chi^2(1) = 11.980$, p = 0.001. The effect size was small (ϕc 0.164, p = 0.001).
To entertain customers	$\chi^2(1) = 8.191$, p = 0.004. The effect size was small (ϕc 0.138, p = 0.004).
To gain brand recognition	$\chi^2(1) = 5.295$, p = 0.021. The effect size was small (ϕc 0.109, p = 0.021).
To deliver customer service	$\chi^2(1) = 4.298$, p = 0.038. The effect size was small (ϕc 0.100, p = 0.038).

PURPOSE OF SOCIAL MEDIA	STATISTICALLY SIGNIFICANT ASSOCIATION FINDING BETWEEN THOSE WITH AND WITHOUT FORMAL MARKETING QUALIFICATIONS AND THE CRAMÉR'S V EFFECT SIZE
To gain customer feedback	$\chi^2(1) = 4.137$, $p = 0.042$. The effect size was very small (ϕc 0.098, $p = 0.042$).

Finding 8 - Marketers with formal marketing qualifications are more likely to use social media for customer interaction

Although there was no significance within the generational cohorts, there was a statistically significant association between those with and without formal marketing qualifications and their use of social media for interaction $\chi^2(1) = 11.980$, $p = 0.001$. The Cramér's V effect size was small (ϕc 0.164, $p = 0.001$).

The sample number was 444 (with formal marketing qualifications = 322, without formal marketing qualifications = 122). The null hypothesis was rejected, as 306 out of 322 (95%) respondents with formal marketing qualifications used social media within their organisation for the purpose of interaction, compared to 104 out of 122 (85.2%) of those with no formal marketing qualifications.

A minor cohort of 5.0 per cent (n=16) in the category with qualifications did not use social media for the purpose of interaction compared to 14.8 per cent (n=18) within the no formal marketing qualifications category. Hence the proportion of people working in marketing and using social media for interaction is 0.95 for with formal marketing qualifications and 0.85 for those without formal marketing qualifications which is a difference in proportion of 0.1 (0.95 – 0.85 = 0.1).

Finding 9 – Marketers with formal marketing qualifications are more likely to use social media to entertain customers

There was a statistically significant association between those with formal marketing qualifications and their use of social media for entertainment: $\chi^2(1) = 8.191$, $p = 0.004$. The Cramér's V effect size was small (ϕc 0.138, $p = 0.004$).

As with the generational cohorts, the null hypothesis was rejected, as 182 out of 315 (57.8%) respondents with formal marketing qualifications used social media within their organisation for the purpose of entertainment, compared to 50 out of 118 (42.4%) without formal marketing qualifications.

The sample number was 433 (with formal marketing qualifications = 315, without formal marketing qualifications = 118). In the category with formal marketing qualifications 133 (42.2%) respondents did not use social media for the purpose of entertainment compared to 68 (57.6%) without formal marketing qualifications. Hence the proportion of people working in marketing with formal marketing qualifications and using entertainment within social media is 0.57 for those with formal marketing qualifications and 0.42 for those without formal marketing qualifications which is a difference in proportion of 0.1 (0.57 – 0.42 = 0.15).

Finding 10 - Marketers with formal marketing qualifications are more likely to use social media to gain brand recognition

Although there was no statistical difference within the generational cohorts, there was a statistically significant association between those with formal marketing qualifications and their use of social media for brand recognition: $\chi^2(1) = 5.295$, $p = 0.021$. The Cramér's V effect size was small (ϕc 0.109, $p = 0.021$).

The sample number was 443 (with formal marketing qualifications = 321, without formal marketing qualifications = 122). The null hypothesis was rejected as 311 out of the 321 (96.9%) respondents with formal marketing qualifications used social media within their organisation for the purpose of gaining brand recognition, compared to 112 out of the 122 (91.8%) with no formal marketing qualifications.

Only 3.1 per cent (n=10) in the category with formal marketing qualifications did not use social media for the purpose of brand recognition compared to 8.2 per cent (n=10) without formal marketing qualifications. Hence the proportion of people working in marketing and using social media for interaction is 0.96 for those with formal marketing qualifications and 0.91 for those without formal marketing qualifications which is a difference in proportion of 0.05 (0.96 – 0.91 = 0.05).

Finding 11 - Marketers with formal marketing qualifications are more likely to use social media to deliver customer service

Using social media for customer service was statistically significant within the generational cohorts and there was a statistically significant association between those with and without formal marketing qualifications and their use of social media for customer service $\chi^2(1) = 4.298$, $p = 0.038$. The Cramér's V effect size was small (ϕc 0.100, $p = 0.038$). Thus the null hypothesis was rejected, as 182 out of 313 (58.1%) of those with formal marketing qualifications used social media within their organisation for the purpose of delivering customer service, compared to 57 out of 121 (47.1%) digital immigrants.

The sample number was 434 (with formal marketing qualifications = 313, without formal marketing qualifications = 121) and 131 (41.9%) of those with formal marketing qualifications did not use social media for the purpose of customer service compared to 64 (52.9%) without formal marketing qualifications. Hence the proportion of people working in marketing using social media for customer service is 0.58 for those with formal marketing qualifications and 0.47 for those without, which is a difference in proportion of 0.1 (0.58 – 0.47 = 0.1).

Finding 12 - Marketers with formal marketing qualifications are more likely to use social media for feedback

Although there was no statistical difference within the generational cohorts in gaining feedback from social media, there was some statistical significance between those with and without formal marketing qualifications and their use of social media for feedback: $\chi^2(1) = 4.137$, $p = 0.042$. The Cramér's V effect size was very small (ϕc 0.098, $p = 0.042$).

The sample number was 435 (with formal marketing qualifications = 317, without formal marketing qualifications = 118). The null hypothesis was rejected, as 198 out of 317 (62.5%) respondents with formal marketing qualifications used social media within their organisation for the purpose of gaining feedback, compared to 61 out of 118 (51.7%) without formal marketing qualifications.

A total of 119 in the category with formal marketing qualifications did not use social media for the purpose of feedback compared to 57 within the no formal marketing qualifications category. Hence the proportion of people working in marketing and using social media for feedback is 0.62 for those with formal marketing qualifications and 0.51 for those without formal marketing qualifications which is a difference in proportion of 0.1 (0.62 – 0.51 = 0.1).

6.7.2 Social media processes based on presence or absence of formal marketing qualifications

In terms of social media processes and the relationship between those with and without formal marketing qualifications, the hypotheses are shown in Figure 6.11.

Figure 6.11 Null and alternative hypotheses for the social media processes which apply to their organisation between those with and without formal marketing qualifications

$H0: C_1 - C_2 = 0$

- The null hypothesis considered that within the sample, there is no significant difference between those with and without formal marketing qualifications in the social media processes which apply to their organisation (where C_1 represents those with formal marketing qualifications and C_2 represents those without).

$H1: C_1 - C_2 \neq 0$

- The alternative hypothesis was considered that within the sample, there is a significant difference between those with and without formal marketing qualifications in the social media processes which apply to their organisation (where C_1 represents those with formal marketing qualifications and C_2 represents those without).

The null hypothesis was retained, with no statistical association (χ^2, $p > 0.05$) between those with and those without formal marketing qualifications and the social media processes which apply to their organisation as shown in Table 6.10.

Table 6.10 Research Phase One - Where no significant association was found between those with and those without formal marketing qualifications and social media processes ordered by chi-square results

PROCESSES	NULL HYPOTHESES RETAINED
Social media activities are connected	The sample number was 429 and more than 81 per cent of respondents in both groups (those with formal marketing qualifications = 311, those without formal marketing qualifications = 118) answered 'yes' that their organisation's social media activities were connected to their business processes: $\chi^2(1)$, p = 0.817.
Social media activity focuses on our customers	The sample number was 439 and more than 94 per cent of respondents in both groups (those with formal marketing qualifications = 318, those without formal marketing qualifications = 121) answered 'yes' that their organisation's social media focused on their customers or their products / services. Therefore there was no significant association between formal marketing qualifications and focus on customers or products: $\chi^2(1)$, p = 0.647.

However, the null hypothesis was rejected and the alternative hypothesis accepted as statistical significance was found in the following social media process:

Finding 13 - Marketers with formal marketing qualifications are more likely to integrate their organisation's social media communications

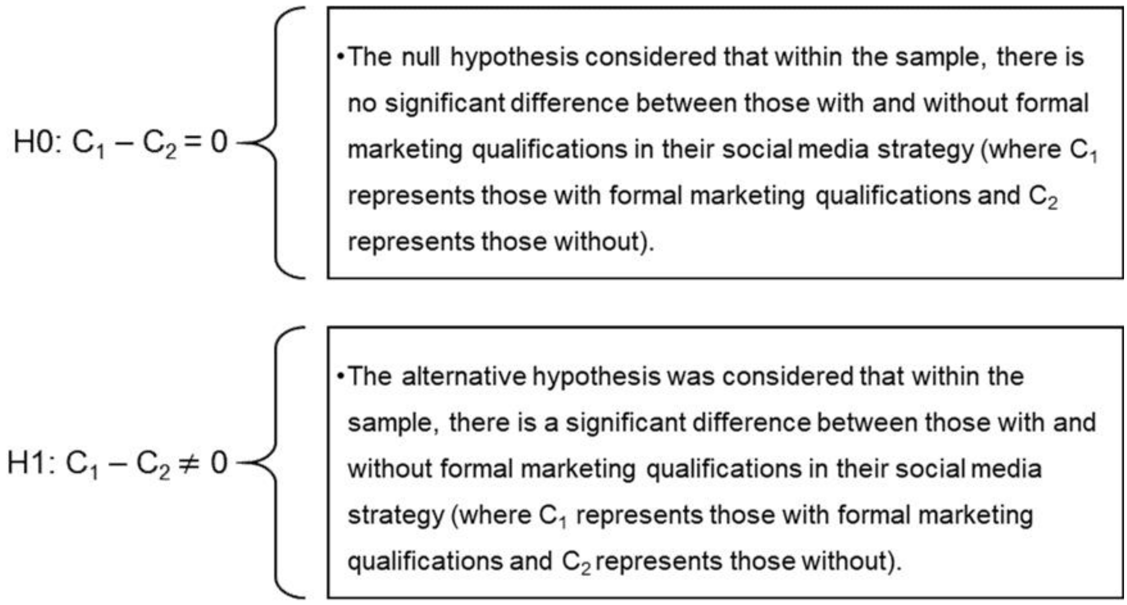
The sample number was 426 and there was a statistically significant association between those with and without formal marketing qualifications (with formal marketing qualifications = 312, without formal marketing qualifications = 114) and their integration of social media communications: $\chi^2(1) = 11.776$, p = 0.001. The Cramér's V effect size was small (ϕc 0.166, p = 0.001). Therefore the null hypothesis was thus rejected, as 267 out of the 312 (85.6%) with formal marketing qualifications integrated their social media communication, compared to 81 out of 114 (71.1%) without formal marketing qualifications. Some 14.4 per cent (n=45) of those with formal marketing qualifications did not integrate social media communications compared to 28.9 per cent (n=33) of those without formal marketing qualifications.

Hence the proportion of people with formal marketing qualifications integrating social media communications is 0.85 and 0.71 for those without formal marketing qualifications which is a difference in proportion of 0.1 (0.85 – 0.71 = 0.14).

6.7.3 Social media strategy based on presence or absence of formal marketing qualifications

The Pearson's chi-square (χ^2) test for association was again used and the 'don't know' responses are reported in this section where there were higher numbers of don't know responses which resulted in sample sizes below 400. Thus two sets of analyses were performed throughout this section for (a) Yes and No responses only and (B) Yes, No and Don't Know responses. The hypotheses for social media strategy are shown in Figure 6.12.

Figure 6.12 Null and alternative hypotheses for social media strategy between those with and without formal marketing qualifications



The null hypothesis was retained, with no statistical association (χ^2, p >0.05) between those with or without formal marketing qualifications in their organisations and social media strategy in the following areas as shown in Table 6.11.

Table 6.11 Research Phase One - Where no significant association was found between those with and without formal marketing qualifications and strategy ordered by chi-square results

STRATEGY	NULL HYPOTHESES RETAINED
Reflected on the performance of the social media activity	There was no significant association between those with and without formal marketing qualifications: $\chi^2(1)$, p = 0.989. The sample number was 382 and there was little difference as in both groups (with formal marketing qualifications = 269, without formal marketing qualifications = 113) 84 per cent of respondents answered 'yes' that they had reflected on the performance of the social media activity. There were 21 'don't know' responses, bringing the total number of respondents to this question to 403, although there was no significant association: $\chi^2(2)$, p = 0.217.
Clear objectives in place for social media management	There was no significant association between those with and without formal marketing qualifications: $\chi^2(1)$, p = 0.945. There was little difference between the groups (with formal marketing qualifications = 274, without formal marketing qualifications = 116), as more than 71 per cent of respondents in both groups answered 'yes' that they had clear objectives in place for social media management. The sample number was 390 and there were 13 'don't know' responses, bringing the total number of respondents to this question to 403, although there was no significant association: $\chi^2(2)$, p = 0.178.

STRATEGY	NULL HYPOTHESES RETAINED
Measured the value of social media	There was no significant association between those with and without formal marketing qualifications: $\chi^2(1)$, p = 0.852. The sample number was 381 and there was little difference as in both groups (with formal marketing qualifications = 268, without formal marketing qualifications = 113) over 75 per cent of respondents answered 'yes' that they measured the value of social media. There were 22 'don't know' responses, bringing the total number of respondents to this question to 403, although there was no significant association: $\chi^2(2)$, p = 0.289.
Considered initial set-up cost and the ongoing maintenance costs when selecting social media channels	There was no significant association between those with and without formal marketing qualifications: $\chi^2(1)$, p = 0.754. The sample number was 347 and more than 68 per cent of respondents in both groups (with formal marketing qualifications = 243, without formal marketing qualifications = 104) answered 'yes' that they had considered the initial set-up cost and the ongoing maintenance costs when selecting social media channels. However, those with formal marketing qualifications were somewhat more likely to say yes that they had considered costs (70.0 per cent). There were 56 'don't know' responses, bringing the total number of respondents to this question to 403, although there was no significant association: $\chi^2(2)$, p = 0.797.
Considered potential risks before using social media, such as negative comments	There was no significant association between those with and without formal marketing qualifications: $\chi^2(1)$, p = 0.062. The sample number was 374 and more than 79 per cent of respondents in both groups (with formal marketing qualifications = 262, without formal marketing qualifications = 112) answered 'yes' that they had considered potential risks before using social media. However, those with formal marketing qualifications were more likely to say yes that they had considered risks (87.0 per cent). There were 29 'don't know' responses, bringing the total number of respondents to this question to 403, although there was no significant association: $\chi^2(2)$, p = 0.120.

STRATEGY	NULL HYPOTHESES RETAINED
Carried out research before using social media	There was no significant association between those with and without formal marketing qualifications: $\chi^2(1)$, p = 0.060. The sample number was 357 and more than 50 per cent of respondents in both groups (with formal marketing qualifications = 247, without formal marketing qualifications = 110) answered 'yes' that they had carried out research before using social media. However, those with formal marketing qualifications were more likely to say yes that they had conducted research (61.5 per cent). There were 46 'don't know' responses, bringing the total number of respondents to this question to 403, although there was no significant association: $\chi^2(2)$, p = 0.159.

Partial finding - Clear strategy and vision for social media management

There was no significant association between those with and without marketing formal marketing qualifications: $\chi^2(1)$, p = 0.322, where the sample number was 394. More than 68 per cent of respondents in both groups (with formal marketing qualifications = 277, without formal marketing qualifications = 117) answered 'yes' that they had a clear strategy and vision for social media management. Those with formal marketing qualifications were somewhat more likely to have a clear strategy and vision (73.3%) compared to those without formal marketing qualifications (68.4%).

However, there were nine 'don't know' responses and where they were included and the sample number increased to 403 (with formal marketing qualifications = 280, without formal marketing qualifications = 123), there was a statistically significant association between those with or without formal marketing qualifications and social media strategy and vision being in place: $\chi^2(2) = 6.636$, p = 0.036. The Cramér's V effect size was small (ϕc 0.128, p = 0.036).

The null hypothesis was thus rejected, as 203 out of 280 (72.5%) of those with formal marketing qualifications had a clear strategy and vision for social media management, compared to 80 out of 123 (65%) without formal marketing qualifications. Of those with formal marketing qualifications, 26.4 per cent (n=74) did not have a clear strategy and vision for social media management and 1.1 per cent (n=3) did not know. Of those without formal marketing qualifications 30.1 per cent (n=37) did not have a clear strategy and vision for social media management and 4.9 per cent (n=6) did not know.

Partial finding - Manage all social media interaction

(a) Yes and No responses only

There was a statistically significant association between those with or without formal marketing qualifications and their management of social media interaction: $\chi^2(1) = 3.910$, $p = 0.048$. The Cramér's V effect size was small (ϕc 0.101, $p = 0.048$). Therefore where the sample number was 384 (with formal marketing qualifications = 269, without formal marketing qualifications = 115) the null hypothesis was rejected, as 254 out of 269 (94.4%) of those with formal marketing qualifications compared to 102 out of 115 (88.7%) of those without formal marketing qualifications managed all social media interaction.

Of those without formal marketing qualifications 11.3 per cent (n=13) did not manage social media interaction compared to 5.6 per cent (n=15) of those with formal marketing qualifications. Hence the proportion of people working in marketing and managing social media interaction is 0.94 for those with formal marketing qualifications and 0.88 for those without formal marketing qualifications, which is a difference in proportion of 0.06 (0.94 – 0.88 = 0.06).

(b) Yes, No and Don't Know responses

However, there were 19 'don't know' responses, bringing the total number of respondents to this question to 403. When this was analysed, there was no statistical significance: $\chi^2(2) = 5.130$, $p = 0.077$, thus the null hypothesis was accepted.

Finding 14 - Marketers with formal marketing qualifications are more likely to measure results from social media

(a) Yes and No responses only

There was a statistically significant association between those with and without formal marketing qualifications and their measurement of social media: $\chi^2(1) = 10.939$, $p = 0.001$. The Cramér's V effect size was small (ϕc 0.169, $p = 0.001$) and therefore the null hypothesis was rejected, as 239 out of 269 or 88.8 per cent of those with formal marketing qualifications, compared to 87 out of 115 or 75.7 per cent of those without formal marketing qualifications measured results from social media. The sample number was 384 (with formal marketing qualifications = 269, without formal marketing qualifications = 115).

Of those without formal marketing qualifications, 24.3 per cent (n=28) did not measure results from social media compared to 11.2 per cent (n=30) of those with formal marketing qualifications. Hence the proportion of people working in marketing who measured results from social media is 0.88 for those with formal marketing qualifications and 0.75 for those without formal marketing qualifications which is a difference in proportion of 0.1 (0.88 – 0.75 = 0.13).

(b) Yes, No and Don't Know responses

There were 19 'don't know' responses and in this case, there was a statistically significant association between those with formal marketing qualifications and the measurement of social media results where the sample size was larger and included the 'don't know' responses: $\chi^2(2) = 12.084$, $p = 0.002$. The Cramér's V effect size was small (ϕc 0.173, $p = 0.002$).

The sample number was 403 (with formal marketing qualifications = 280, without formal marketing qualifications = 123). The null hypothesis was thus rejected, as 239 out of 280 (85.4%) of those with formal marketing qualifications managed all social media interaction, compared to 87 out of 123 (70.7%) of those without formal marketing qualifications.

Of those with formal marketing qualifications, 10.7 per cent (n=30) did not manage social media interaction and 3.9 per cent (n=11) did not know. 22.8 per cent (n=28) of those without formal marketing qualifications did not manage social media interaction and 6.5 per cent (n=8) did not know.

6.7.4 Social media management based on presence or absence of formal marketing qualifications

The management of resources for social media was considered and Figure 6.13 shows the hypotheses.

Figure 6.13 Null and alternative hypotheses for management of resources between those with and without formal marketing qualifications

$H0: C_1 - C_2 = 0$

- The null hypothesis considered that within the sample, there is no significant difference between those with and without formal marketing qualifications in their management of resources (where C_1 represents those with formal marketing qualifications and C_2 represents those without).

$H1: C_1 - C_2 \neq 0$

- The alternative hypothesis was considered that within the sample, there is a significant difference between those with and without formal marketing qualifications in management of resources (where C_1 represents those with formal marketing qualifications and C_2 represents those without).

The null hypothesis was retained, with no statistical association (χ^2, $p > 0.05$) between those with and those without formal marketing qualifications and the management of resources for social media in the areas shown in Table 6.12.

Table 6.12 Research Phase One - Where no significant association was found between the generational cohorts and the management of resources for social media ordered by chi-square results

STRATEGY	NULL HYPOTHESES RETAINED
Our organisation needed more skills to manage our social media	There was no significant association between those with and without formal marketing qualifications: $\chi^2(1)$, p = 0.307, as more than 73 per cent of respondents in both groups (with formal marketing qualifications = 316, without formal marketing qualifications = 117) answered 'yes' that they needed more skills to manage social media. The sample number was 433 and those with formal marketing qualifications were more likely to say yes that they needed more skills (78.2%).
We have some people in-house to manage social media and some external support from a consultant, agency, or other third party	There was no significant association between those with and without formal marketing qualifications: $\chi^2(1)$, p = 0.236 and over 39 per cent of respondents in both groups (with formal marketing qualifications = 312, without formal marketing qualifications = 119) answered 'yes' that they used a mixed management model with some people internally and some elements contracted-out. The sample number was 431 and those with formal marketing qualifications were more likely to say that they used a mixed approach to the management of social media (45.8%).
We contract out management of social media	There was no significant association between those with and without formal marketing qualifications: $\chi^2(1)$, p = 0.234. Over 21 per cent of respondents in both groups (with formal marketing qualifications = 310, without formal marketing qualifications = 118) answered 'yes' that they contracted out the management of social media. The sample number was 428 and those with formal marketing qualifications were more likely to say that they contracted out the management of social media (26.8%).

STRATEGY	NULL HYPOTHESES RETAINED
There are people inside our organisation who manage our social media	There was no significant association between those with and without formal marketing qualifications: $\chi^2(1)$, p = 0.154, as more than 86 per cent of respondents in both groups (with formal marketing qualifications = 320, without formal marketing qualifications = 120) answered 'yes' that they had people inside the organisation who managed social media. The sample number was 440 and those with formal marketing qualifications were more likely to say that there were people internally managing social media (91.3%).

However, the null hypothesis was rejected and the alternative hypothesis accepted as statistical significance was found between those with and without formal marketing qualifications and the following aspects of social media marketing application:

Finding 15 - Marketers with formal marketing qualifications were more likely to allocate extra resources to use social media

There was a statistically significant association between those with or without formal marketing qualifications and their allocation of extra resources for social media $\chi^2(1) = 4.336$, p = 0.037. The Cramér's V effect size was small (ϕc 0.101, p = 0.037). Therefore the null hypothesis was rejected as 202 out of the 310 (65.2%) with formal marketing qualifications, compared to 64 out of 118 (54.2%) without formal marketing qualifications had to allocate extra resources to use social media. The sample number was 428 (with formal marketing qualifications = 310, without formal marketing qualifications = 118).

Of those without formal marketing qualifications 45.8 per cent (n=54) did not allocate extra resources for social media compared to 34.8 per cent (n=108) of those with formal marketing qualifications. Hence the proportion of people working in marketing and allocating extra resources is 0.65 for those with formal marketing qualifications and 0.54 for those without formal marketing qualifications, which is a difference in proportion of 0.1 (0.65 – 0.54 = 0.11).

6.8 Social media benefits for organisations

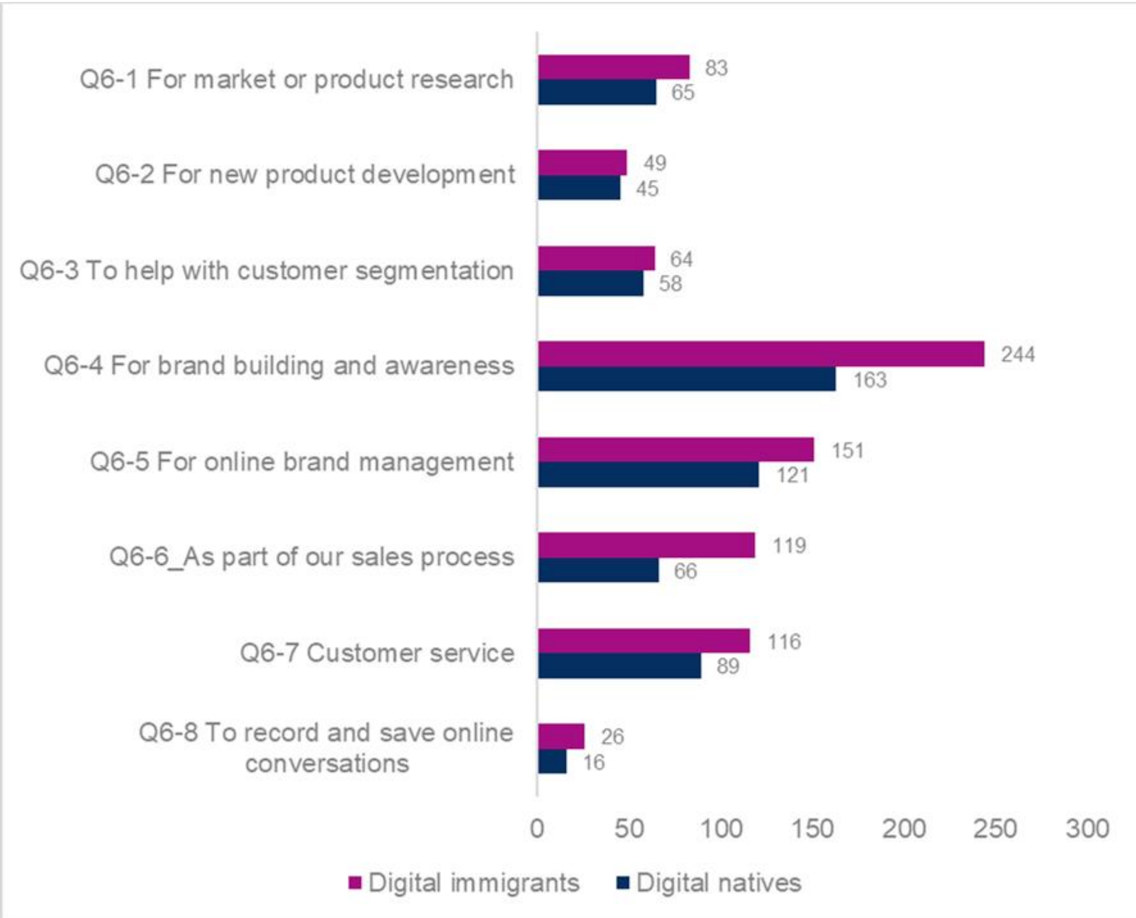
This question was a multiple response set and respondents were required to positively choose at least one response (tick all that apply). Thus this could not be tested using Pearson's chi-square (χ^2) test for association, as there was no relationship, due to the multivariate data and therefore a variable set was created. From the variable set the frequencies were considered, as shown in Table 6.13 and it should be noted that the total exceeds the 448 respondents as multiple responses were permitted.

Table 6.13 Research Phase One - Frequencies of benefits from social media identified by respondents ordered by total number of responses

BENEFIT SELECTED	NUMBER OF RESPONSES
Q6-4 For brand building and awareness	407
Q6-5 For online brand management	272
Q6-7 Customer service	205
Q6-6 As part of our sales process	185
Q6-1 For market or product research	148
Q6-3 To help with customer segmentation	122
Q6-2 For new product development	94
Q6-8 To record and save online conversations	42
Total	**1475**

The benefits were further analysed and Figure 6.14 showed the benefits or affordances from social media by generational cohort. The sample number was 448 (digital natives = 177, digital immigrants = 271) and respondents were able to select multiple responses. The highest response was for the brand building and awareness with the combined total at 407 and lowest response rate was for ‘record and save conversations’ with a total of 42 confirming that this was a benefit of social media.

Figure 6.14 Research Phase One - Benefits of social media by numbers of responses between digital natives and digital immigrants



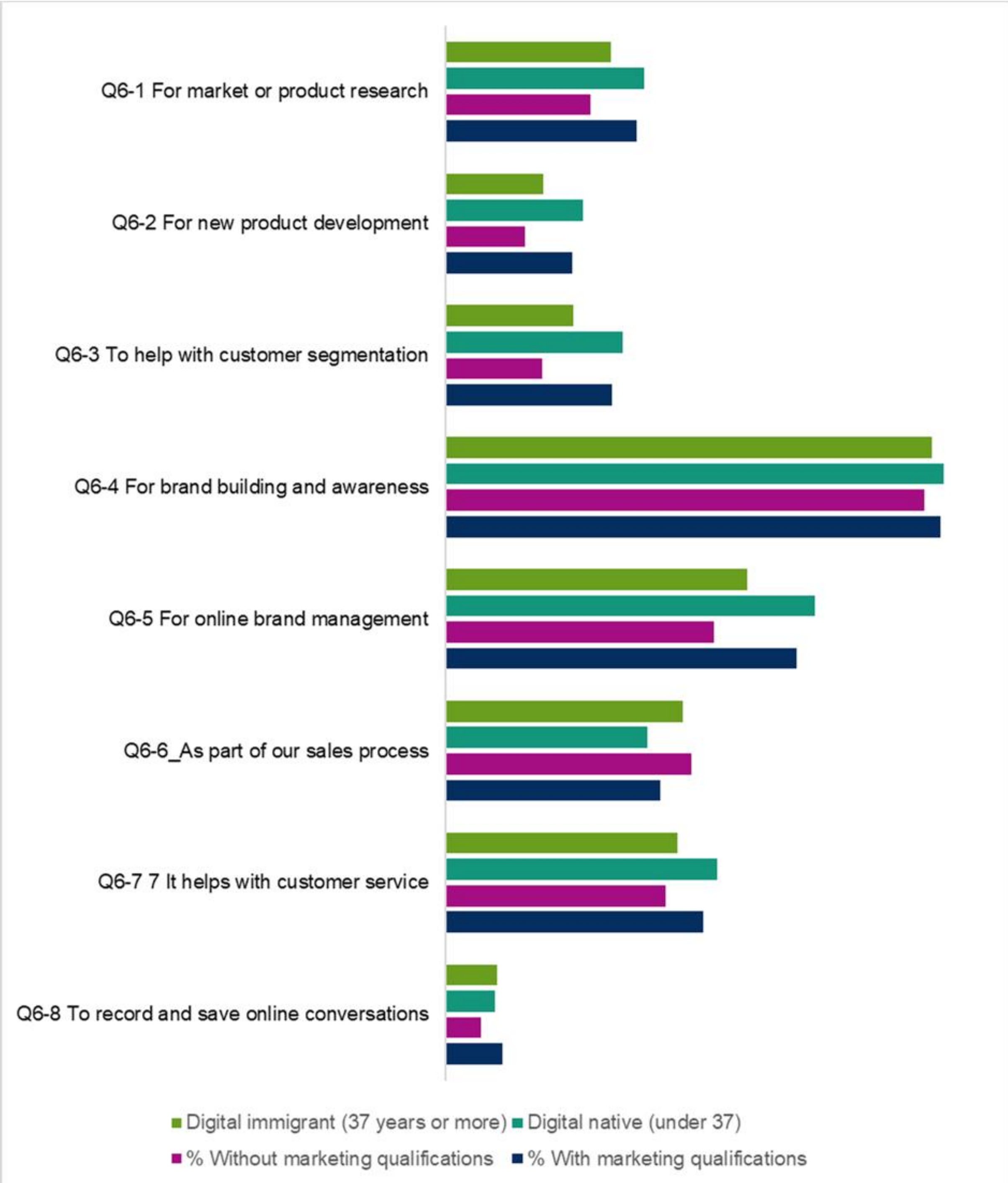
A further crosstab was performed to understand the benefits or affordances from social media by formal marketing qualifications. The sample number was 448 (with formal marketing qualifications = 325, without formal marketing qualifications = 123) and Figure 6.15 shows the responses. Again, the highest response was for the brand building and awareness with the combined total at 407 and the lowest response rate was again for ‘record and save conversations’ with a total of 42 confirming that this was a benefit of social media.

Figure 6.15 Research Phase One - Benefits of social media by numbers of responses between those with or without formal marketing qualifications

Comparing the benefits (affordances) by generational cohort and formal marketing qualifications, as shown in Figure 6.16, those with formal marketing qualifications and digital natives were more likely to gain the following benefits from social media: market research; new product development; helping with customer segmentation; online brand management; and customer service.

However, those without formal marketing qualifications and digital immigrants were more likely to gain a benefit from social media as part of the sales process. All variables gained a benefit from social media for brand building and awareness.

Figure 6.16 Research Phase One - Affordances by digital immigrant and digital native and those with and without formal marketing qualifications identified by the percentage of responses



6.9 Chapter conclusions

This section has explained the findings of the online survey and statistical significance was found in several areas which are listed below and grouped by the Cramér's V (ϕc) effect size.

The contribution of this chapter has been to demonstrate that there are variations in the application of social media by: (i) generational cohort; and (ii) the presence or absence of formal marketing qualifications. The specific findings are summarised in this section.

6.9.1 Findings with medium Cramér's V (ϕc) effect size

Cohen (1992, p. 156) commented that a medium effect size was 'an effect likely to be visible to the naked eye of a careful observer' and the discovery that digital natives are more likely to have formal marketing qualifications than digital immigrants may be evident to practitioners and has implications for management as well as policy, as it may be that adjustments are required based on generational cohorts.

> ***Digital natives are more likely to have formal marketing qualifications than digital immigrants***
>
> $\chi^2(1) = 23.942$, $p = 0.000$ and medium effect size (ϕc 0.231, $p = 0.000$).

6.9.2 Findings with small Cramér's V (ϕc) effect size

Table 6.14 shows the findings where there was a significant association with a small effect size.

Table 6.14 Summary of chi-square results with a small Cramér's V (ϕc) effect size from Research Phase One - Between generational cohorts (digital natives and digital immigrants) and the presence or absence of formal marketing qualifications

APPLICATION	RESULTS WITHIN DIGITAL NATIVES	RESULTS WITHIN THOSE WITH FORMAL MARKETING QUALIFICATIONS
More likely to use social media for **entertainment**	$\chi^2(1) = 13.931$, $p = 0.000$ and small effect size (ϕc 0.179, $p = 0.000$).	$\chi^2(1) = 8.191$, $p = 0.004$ and small effect size (ϕc 0.138, $p = 0.004$).
More likely to use social media for **customer service**	$\chi^2(1) = 9.453$, $p = 0.000$ and small effect size (ϕc 0.148, $p = 0.002$).	$\chi^2(2) = 4.298$, $p = 0.038$ and small effect size (ϕc 0.100, $p = 0.038$).
More likely to **manage social media interaction**	Where the sample size was larger (n=448) and included the 'don't know' responses $\chi^2(2) = 6.227$, $p = 0.044$ and small effect size (ϕc 0.118, $p = 0.044$).	$\chi^2(1) = 3.910$, $p = 0.048$ and small effect size (ϕc 0.101, $p = 0.048$).
More likely to **measure results** from social media	$\chi^2(1) = 8.615$, $p = 0.003$ and small effect size (ϕc 0.142, $p = 0.003$).	$\chi^2(1) = 10.939$, $p = 0.001$ and small effect size (ϕc 0.169, $p = 0.001$). Additionally, where the sample size was larger and included the 'don't know' responses this was further confirmed: $\chi^2(2) = 12.084$, $p = 0.002$ and small effect size (ϕc 0.173, $p = 0.002$).
More likely to use social media for **interaction**		$\chi^2(1) = 11.980$, $p = 0.000$ and small effect size (ϕc 0.164, $p = 0.001$).
More likely to use social media for **reviews**	$\chi^2(1) = 7.494$, $p = 0.000$ and small effect size (ϕc 0.131, $p = 0.006$).	
More likely to **measure the value** of social media	χ^2 (2) = 6.570, $p = 0.037$ and small effect size (ϕc 0.121, $p = 0.037$).	
More likely to have **internal staff** managing social media	$\chi^2(2) = 4.454$, $p = 0.035$ and small effect size (ϕc 0.101, $p = 0.035$).	
More likely to **integrate** social media communication		$\chi^2(1) = 11.776$, $p = 0.001$ and small effect size (ϕc 0.166, $p = 0.001$).
More likely to use social media for **brand recognition**		$\chi^2(1) = 5.295$, $p = 0.021$ and small effect size (ϕc 0.109, $p = 0.021$).

APPLICATION	RESULTS WITHIN DIGITAL NATIVES	RESULTS WITHIN THOSE WITH FORMAL MARKETING QUALIFICATIONS
More likely to have clear **strategy and vision** for social media management		Where the sample size was larger and included the ‘don’t know’ responses: $\chi^2(2) = 6.636$, $p = 0.036$ and small effect size (ϕc 0.128, p = 0.036).
More likely to allocate **extra resources** for social media		$\chi^2(2) = 4.336$, $p = 0.037$ and small effect size (ϕc 0.101, p = 0.037).

6.9.3 Findings with very small Cramér’s V (ϕc) effect size

There were three areas where although there was statistical significance, the Cramér’s V effect size was very small, as shown here:

Digital natives are more likely to use social media for offers

$\chi^2(1) = 3.909$, $p = 0.048$ and very small effect size (ϕc 0.095, p = 0.000).

Marketers with formal marketing qualifications are more likely to use social media for feedback

$\chi^2(1) = 4.137$, $p = 0.042$ and very small effect size (ϕc 0.098, p = 0.042).

Digital natives are more likely to allocate extra resources to use social media

$\chi^2(1) = 4.044$, $p = 0.044$ and very small effect size (ϕc 0.097, p = 0.044).

This chapter has identified areas of statistical significance in the differences of social media marketing application between generational cohorts as well as those with and without formal marketing qualifications.

Additionally, this chapter has contributed towards areas to explore within Research Phase Two, semi-structured interviews. The areas of statistical significance will form the basis of the topic guide and subsequent thematic coding which are discussed in the next chapter.

Chapter Seven: Research Phase Two - Qualitative Semi-Structured Interview Findings

7.1 Chapter introduction

This chapter presents the findings from the Research Phase Two research, the semi-structured interviews which sought to address: ‘What are the significant differences in social media marketing application?’. The differences were centred around generational cohorts (classified as digital immigrants and digital natives) and the presence or absence of formal marketing qualifications.

Starting with the interview context, this chapter will consider the role of the interviewer as well as potential bias in interviews. Subsequently, this chapter will present the findings from the semi-structured interviews. The twenty-six participants’ profiles are illustrated to demonstrate the wide sources of knowledge, from different job roles, varying locations and diverse sectors.

Following thematic analysis, the main themes are identified and discussed. This chapter concludes by identifying significant differences in social media application based on generational cohort and the presence or absence of formal marketing qualifications. Finally, to connect the Stages of Growth model (Duane and O’Reilly, 2016), and the affordances identified in this study, a Social Media Affordances Maturity Scale is developed, within a pragmatist and real world approach to research (Robson and McCartan, 2015), thus enabling organisations to identify the action required to move to the next stage.

7.2 Interview context

7.2.1 The role of the interviewer

As interviews are conversations, one factor to consider is the role of the interviewer which Kvale and Brinkmann (2009), conceptualised as a miner seeking knowledge or as a traveller constructing knowledge. The traveller 'wanders through the landscape' (p. 48) and the tales collected along the journey are interpreted and shared. The miner is a contrasting approach, seeking gold nuggets and digging for data. In this study, the aim was to seek knowledge to subsequently inform practice, maintaining a pragmatic stance, thus the role of miner was adopted.

Whilst the role of interviewer has been defined, Myers and Newman (2007, p. 13) identified the actors in the interview process:

> Both the interviewer and the interviewee can be seen as actors. The researcher has to play the part of an interested interviewer; the interviewee plays the part of a knowledgeable person in the organisation.

The knowledgeable people in these interviews represented many sectors, different generational cohorts, varying job roles and different ages of organisation. To enable the interviewee to provide the knowledge, empathy was required on the part of the interviewer to gain their confidence (Myers and Newman, 2007; Saunders *et al.*, 2016).

One dynamic of which the interviewer was aware, was the varying job roles, including several junior staff and thus a supportive and considerate style was employed, aiming to establish reciprocity between interviewer and interviewee in a non-hierarchical style (Bryman and Bell, 2011). To further reassure the participants, the confidentiality and anonymity of the conversation was re-confirmed.

7.2.2 Potential bias in interviews

In an interview context, there is the issue of bias from both the interviewer and the interviewee, founded on perceptions on both sides. These issues can be reduced by making the participants feel more at ease (letting them select the location) as well as providing the participants with background information about the researcher.

Whilst these factors may not be wholly removed, they were mitigated by enabling participants to select their own interview location, so that it was convenient for them (Saunders *et al.*, 2016). Additionally, the interviewer chose to share publicly available information about the interviewer, so that the participant felt at greater ease and knew with whom they would be speaking.

7.3 Participants' profiles

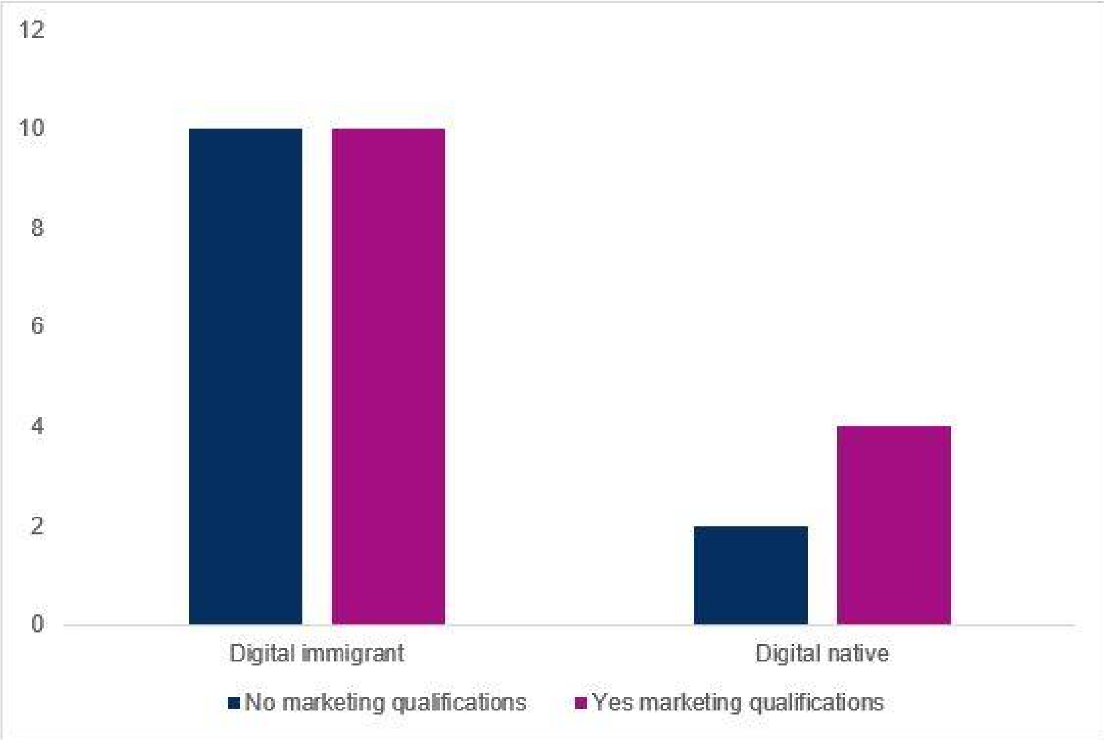
As agreed, anonymity was provided to all participants and following the principle of beneficence, aggregated data is provided to describe the 26 participants, so that the participants cannot be individually identified. The combined data in this section will present the generational cohorts, their formal marketing qualifications, job roles, geographical locations and sectors.

The participants comprised twenty digital immigrants and six digital natives and the summary data is presented in Appendix I, with an example of one transcript in Appendix J.

All participants were contacted by email although there was disparity between the numbers of digital immigrants and digital natives in this qualitative study. More digital immigrants (n=121) indicated that they were able to participate compared to digital natives (n=76). Some of the digital natives who replied and apologised that they could not participate provided reasons: on maternity leave (n=1); changed jobs (n=1); and too busy (n=1).

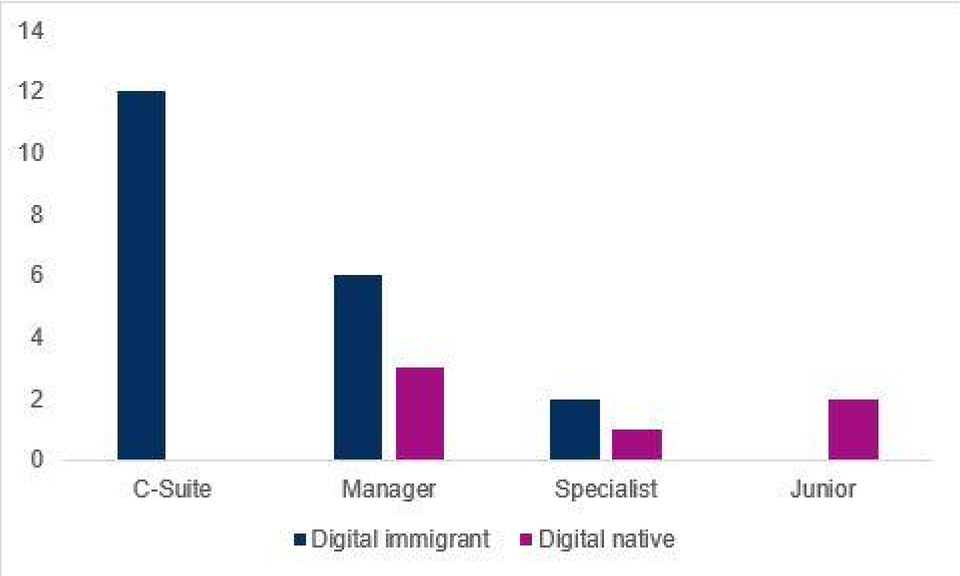
Of the twenty digital immigrants, nine had formal marketing qualifications and of the six digital natives, four had marketing qualifications, as shown in Figure 7.1.

Figure 7.1 Research Phase Two - Participants' profiles by qualification and by generational cohort (digital immigrants and digital natives)



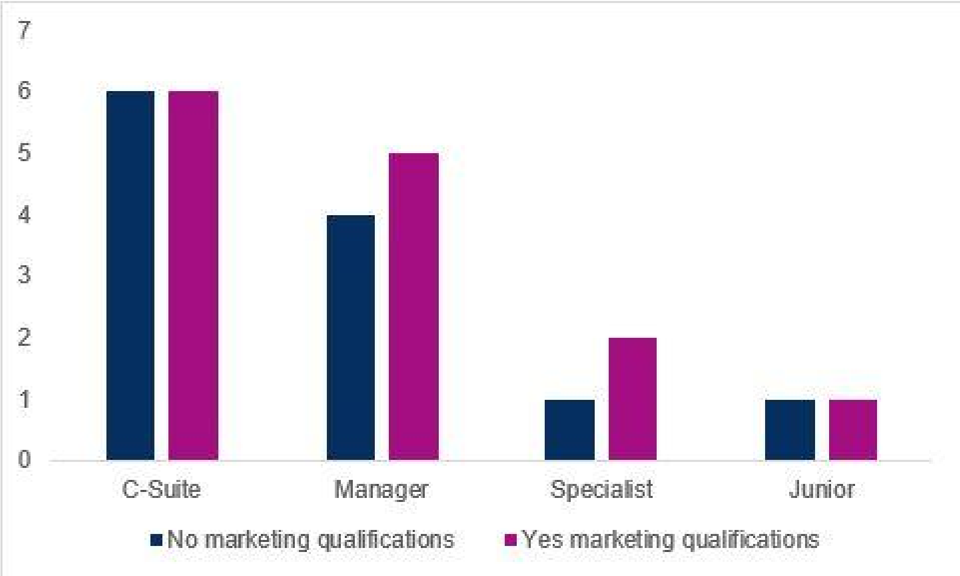
In terms of job roles, unsurprisingly the C-suite only included digital immigrants and the junior role only digital natives. Six aged over 37 were managers and two were specialists. Those under 37 years included three managers and one specialist as shown in Figure 7.2.

Figure 7.2 Research Phase Two - Participants' profiles by generational cohort (digital immigrants and digital natives) and job role



In terms of formal marketing qualifications these were fairly evenly divided amongst job roles. Half of those in the C-suite and junior roles had formal marketing qualifications; of those in manager roles, five out of nine had none, as shown in Figure 7.3.

Figure 7.3 Research Phase Two - Participants' jobs roles and formal marketing qualifications



One factor which did not emerge in Research Phase One was the location of the participants. It had been assumed that the participants were all located in the UK due to the datasets used and thus location was not investigated. Therefore in Research Phase Two it was discovered that the participants worked in many locations with most based in the United Kingdom [CONTENT REDACTED TO PRESERVE ANONYMITY OF PARTICIPANTS] along with others from Ireland to New Zealand, as shown in Table 7.1.

Table 7.1 Research Phase Two - Participants' geographical locations

LOCATION	NUMBER OF PARTICIPANTS
[CONTENT	9
REDACTED TO	7
	2

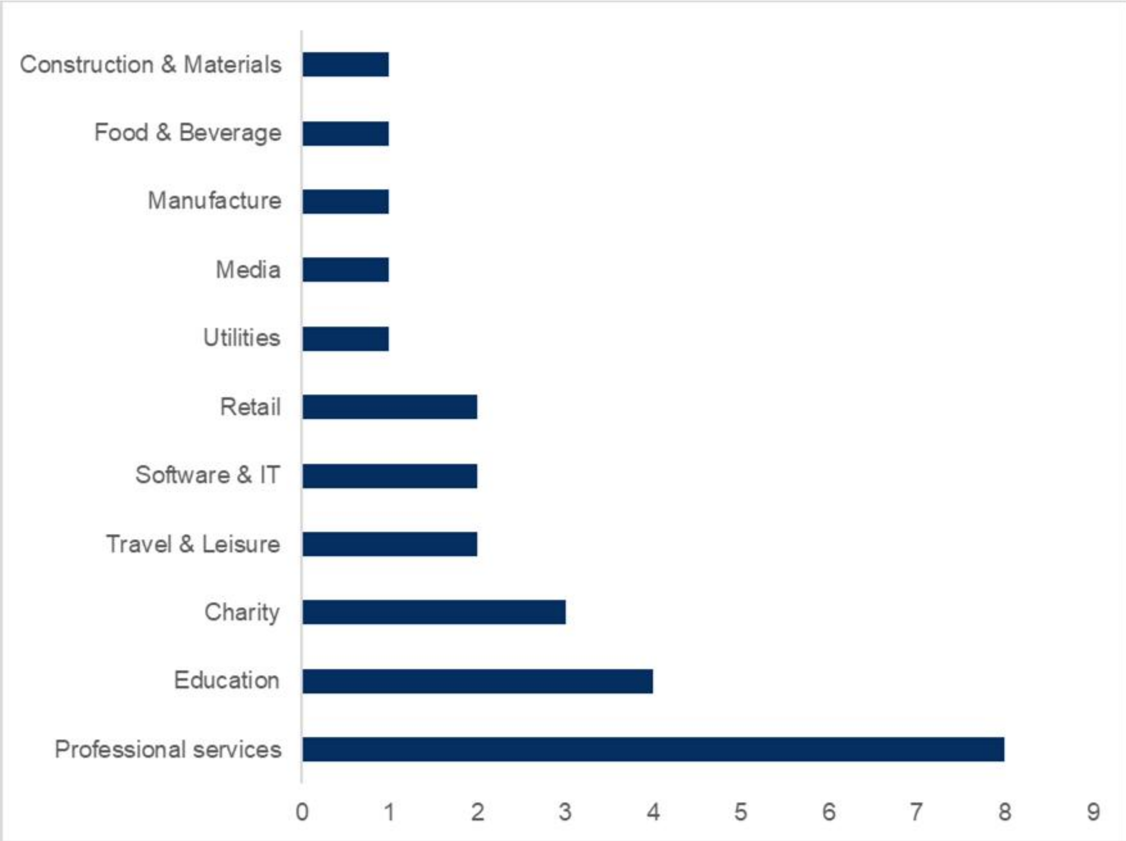
LOCATION	NUMBER OF PARTICIPANTS
PRESERVE ANONYMITY OF PARTICIPANTS]	2
	1
	1
	1
	1
	1
	1

This reinforced the benefit of a mixed-mode survey as James and Busher (2016, p. 3), remarked that ‘online research methods in social science research has enabled researchers to communicate with geographically dispersed individuals’ as many participants would have been inaccessible using traditional face-to-face methods only.

Six of the Skype video interviews were conducted whilst the participants were working from home. This offered a glimpse of a different non-work, more naturalistic environment to which ordinarily, the researcher may not have gained access (Weller, 2017). The interviews, with the exception of the two that were conducted face-to-face, took place away from other people and enabled the participants to enter a narrative that offered an opportunity for catharsis through personal reflection (East *et al.*, 2010; Elmir *et al.*, 2011).

The knowledge of the participants was informed through a broad selection of sectors, as shown in Figure 7.4.

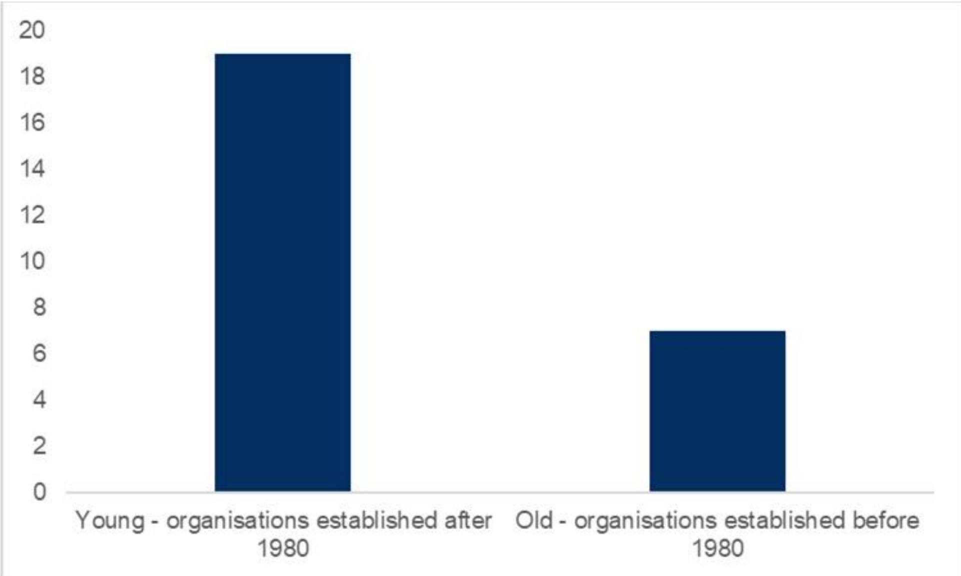
Figure 7.4 Research Phase Two - Participants' organisational sectors



The age of the organisations was reviewed, as shown in Figure 7.5, and was based on the digital native and digital immigrant variable.

Figure 7.5 illustrates the number of organisations established before 1980 (classed as old) and those after 1980 (classed as young). Most of the participants' organisations (19 of the 26) were established after 1980 in the age of the digital native.

Figure 7.5 Research Phase Two - Age of participants' organisations



To protect the anonymity of the participants, the detailed transcripts are available separately. To evidence the research, there is one anonymised version in Appendix J. Thus the next section presents four examples, in the form of vignettes as 'examples of people and their behaviour in (short) story form' (Collins *et al.*, 2009, p. 63), to shine a light on the participants, hitherto referred to by their case reference number with a summary shown in Table 7.2.

Table 7.2 Summary of all participants

[CONTENT REDACTED TO PRESERVE ANONYMITY OF PARTICIPANTS]

Guidelines to identify which participants to select for vignettes were sought through a form of decision tree, which was created with different branches including generational cohort, age of the organisation and presence of formal marketing qualifications. This resulted in 'the target variables' based on the 'if-then rules' (Yeo and Grant, 2018, p. 292). All participants were taken through the tree process and one from each of the four groups was selected, as shown in Figure 7.6.

The four selected vignettes from [CONTENT REDACTED TO PRESERVE ANONYMITY OF PARTICIPANTS] follow in the next section, after the decision tree.

Figure 7.6 Decision tree to support the identification and selection of vignettes for Research Phase Two

[CONTENT REDACTED TO PRESERVE ANONYMITY OF PARTICIPANTS]

Figure 7.7 [CONTENT REDACTED TO PRESERVE ANONYMITY OF PARTICIPANTS]

[CONTENT REDACTED TO PRESERVE ANONYMITY OF PARTICIPANTS]

Figure 7.8 [CONTENT REDACTED TO PRESERVE ANONYMITY OF PARTICIPANTS]

[CONTENT REDACTED TO PRESERVE ANONYMITY OF PARTICIPANTS]

Figure 7.9 [CONTENT REDACTED TO PRESERVE ANONYMITY OF PARTICIPANTS]

[CONTENT REDACTED TO PRESERVE ANONYMITY OF PARTICIPANTS]

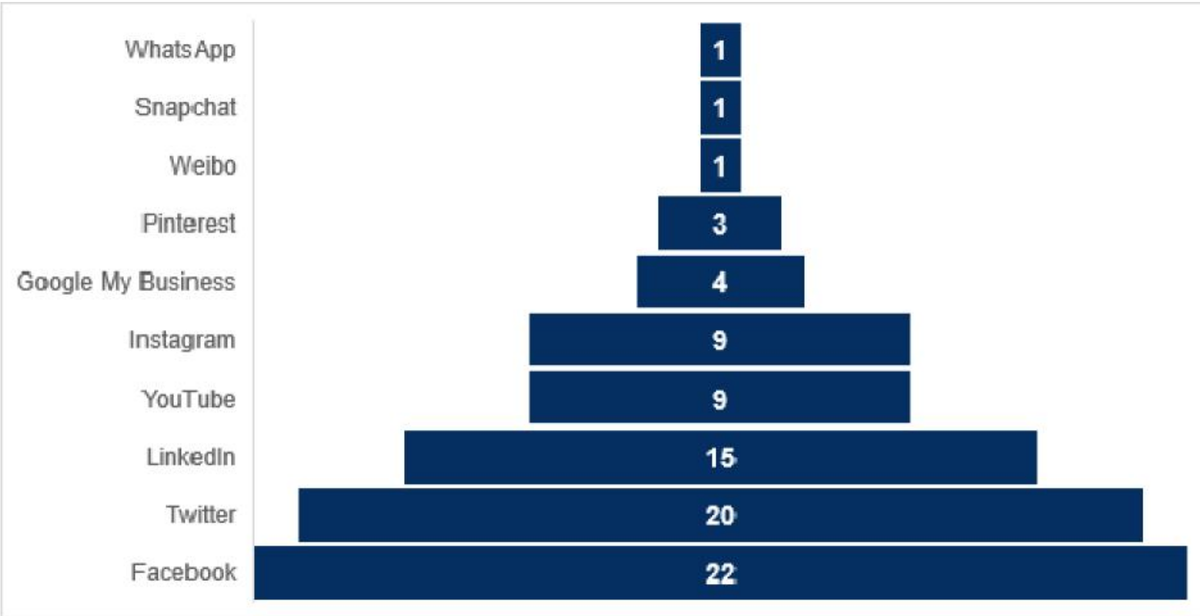
Figure 7.10 [CONTENT REDACTED TO PRESERVE ANONYMITY OF PARTICIPANTS]

[CONTENT REDACTED TO PRESERVE ANONYMITY OF PARTICIPANTS]

7.3.1 Social media networks used

Participants were asked which social media networks their organisations used. Unsurprisingly, the main social media network was Facebook, as shown in Figure 7.11, which was used by 22 of the 25 organisations. There were no discernible differences between generational cohorts, organisation types or presence of formal marketing qualifications. As one participant [CONTENT REDACTED TO PRESERVE ANONYMITY OF PARTICIPANTS] remarked, 'Facebook tends to have been adopted by a wider segment of society'.

Figure 7.11 Research Phase Two - Social media networks used by participants



Facebook was used for many purpose by the participants as shown in Table 7.3.

Table 7.3 Purposes of Facebook use by participants in Research Phase Two

PURPOSE	PARTICIPANT EXAMPLE
For research	You know, set up the thing in Facebook where you can compare yourself against five competitors and see how you're doing.
To connect with the local community	It's more of the local audiences with Facebook.

PURPOSE	PARTICIPANT EXAMPLE
As a customer channel	Probably the main route to customers currently and main route to potential customers.
To connect with business customers	Facebook was like, well our clients are not on there, but they are. But they are in there on a personal capacity.
To share promotional offers	Largely for [customers] to become aware of our promotions, they very much like to see what we have on offer.

Twitter was used for different purposes, such as sharing the latest news and was also considered as a crisis communications channel. Other platforms were used for their ability to reach specific audiences:

- Instagram: To target potential workforce, more informal with younger messaging.
- You Tube: To post videos of events.
- LinkedIn and Twitter: For B2B.

7.4 Interview themes

As noted in Chapter Five, the data analysis procedures involved a process of thematic analysis to order the data to identify meaningful content (Braun and Clarke, 2006; Grbich, 2013). This continues to follow the pragmatist epistemology, seeking utility from the themes.

Chapter Five described the *a priori* themes which were identified in Research Phase One and a framework was created based on specific areas of interest. Maintaining a pragmatist epistemology, these themes were based on the experience of the respondents within their organisations in Research Phase One, the online survey, where areas of statistical significance had been discovered. These included three main themes with sub-themes that were the areas of enquiry within Research Phase Two, as shown in Table 7.4. This formed the basis of the Topic Guide (see Appendix H) for the semi-structured interviews.

Table 7.4 Main theme and sub-themes of enquiry in Research Phase Two

MAIN THEME	SUB-THEMES
Affordances	⟩ To entertain customers ⟩ To provide offers ⟩ To interact with customers ⟩ To gain reviews ⟩ To deliver customer service ⟩ For new product development ⟩ For customer segmentation ⟩ For brand management
Social media strategy	⟩ Measure ⟩ Resources ⟩ Strategy
Critical Incident	⟩ The place ⟩ The persons ⟩ The conditions ⟩ The activities

Adapted from Figure 5.10 Refined thematic map for Research Phase Two

In this chapter each of these themes is discussed. This commences with an overview which is illustrated in Table 7.5 which summarises the cases where these *a priori* themes from extant literature, shown in Table 7.4, were identified as being present (yes or positive response), absent (no or negative response) or in a liminal state (mixed response). In some cases, evidence from the interviews during Research Phase Two, demonstrated that the social media strategy or critical incident element was not applicable.

Table 7.5 Summary of cases where a priori themes were mentioned by participants about their organisations during Research Phase Two

THEMES	
AFFORDANCES	To entertain customers
	To provide offers
	To interact with customers
	To gain reviews
	To deliver customer service
	For new product development
	For customer segmentation
	For brand management
SOCIAL MEDIA STRATEGY	Measure
	Resources
	Strategy
CRITICAL INCIDENT	Example

Key:

- Yes or positive response
- No or negative response
- Mixed response
- Not applicable

The next section will focus upon interpretation of the material collected during Research Phase Two and this is based on each of the *a priori* themes of enquiry which were identified in Research Phase One (see Figure 5.10) and was shown in Table 7.4.

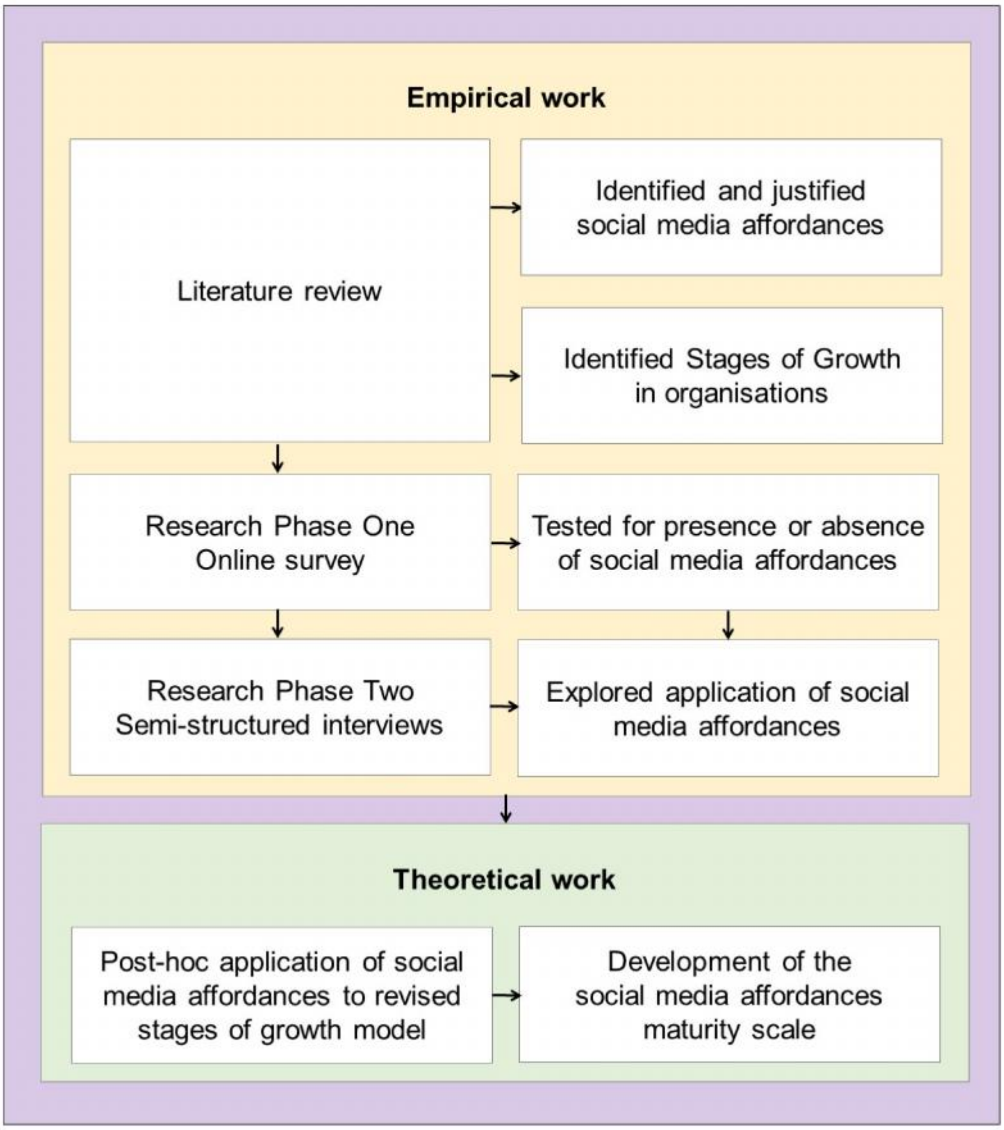
Following a pragmatist ontology, the evidence represents the 'processes, experiences and practices' (Saunders *et al.*, 2016, p. 137), presented by the participants. This involved interpretation and to illustrate this nature of reality, within the context of their organisations, some participant dialogue is included, as direct quotations, where they provide 'vivid, compelling extract examples' (Braun and Clarke, 2006, p. 87), which is supported by Hackley (2003, p. 120) who noted 'The direct quote is important research material'. Furthermore, following a characteristic of mixed methods research, other content is provided visually as this highlights important information (Collins, Onwuegbuzie and Jiao, 2006; Lurie and Mason, 2007; Tashakkori and Teddlie, 2010) and additionally as the use of illustrations in qualitative research is considered 'underutilized' (Verdinelli and Scagnoli, 2013, p. 376) and is thus employed.

The visual content comprised word clouds created within the content analysis software QSR NVivo 12 (QSR International Pty Ltd, 2018) from the discussion surrounding particular themes. The word clouds summarised the content, with the most frequently mentioned words being displayed, where those mentioned most often are enlarged (Grbich, 2013; Vuori and Jussila, 2016). The word clouds were created by means of a text search of the keyword (e.g. entertain) which initially included synonyms (e.g. humour) and stemmed words (e.g. entertainment) and were further refined to remove irrelevant words (e.g. 'sometimes' appeared as a synonym in age / years). This was supplemented, where relevant, by quotation banks which illustrated specific participant comments, related to their organisation (Geron *et al.*, 2000). For brevity, some of the participant dialogue is edited, to ensure a sustained focus upon interpretation of material.

In addition to this analysis, based on the construct of the stages of growth in social media business presence, implementation and management model (Duane and O'Reilly, 2016), which was illustrated in the literature review in Table 3.9, another model is proposed. This is termed the social media affordances maturity scale. The development of the social media affordances in this scale was informed by extant works, in the literature review and subsequently the presence or absence of these affordances was tested in Research Phase One.

Consequently, in Research Phase Two, explanations for the presence of the social media affordances were further explored and refined based on the participant evidence. Following the empirical research, *post-hoc* development of the application of affordances was performed, which was based on an understanding of the definition of social media as the facilitation of interactive, connected, marketing purposes at organisational, peer-to-peer and personal levels, and the participants' abilities, described as maturity. Furthermore, the social media affordances maturity scale follows a pragmatist epistemology to provide practical bearings (Peirce, 1905, p. 171), for organisations and is shown in Figure 7.12.

Figure 7.12 The development of the social media affordances maturity scale



Thus the social media affordances maturity scale is based on the different levels of the application of the social media affordances and social media strategy elements, where they were present in Research Phase One and explored in Research Phase Two. Hence the stages of growth model presented by Duane and O'Reilly (2016) has been further developed, based on evidence from participants and the revised scale items are shown in Table 7.6.

Table 7.6 The development of the social media affordances maturity scale items

STAGES OF GROWTH (DUANE AND O'REILLY, 2016)		APPLICATION OF AFFORDANCES MATURITY LEVEL
No stage present	➔	0. No activity, application avoided
1. Experimentation and Learning	➔	1. Attempted application, no process in place
2. Rapid Growth	➔	2. Ad hoc and inconsistent application
3. Formalisation	➔	3. Basic application
4. Consolidation and Integration	➔	4. Standardised and proactive application
5. Institutional Absorption	➔	5. Integrated and agile application

Thus the social media affordances maturity scale is measured on six levels: Level 0, where there is no evidence of activity or if application of this affordance is purposefully avoided; Level 1, where there is evidence of an attempted application of the affordance, although there is no process in place; Level 2, where the application is ad hoc and inconsistent; Level 3, where there is a limited, reactive or basic application of the affordance; Level 4, where there is evidence of a standardised and proactive application of the affordance; and Level 5, where there is clear evidence of an integrated and agile approach to the application of the affordance.

Therefore this chapter will present the qualitative analysis from Research Phase Two as applied to the social media affordances maturity scale.

7.4.1 Main theme 1: Affordance - To entertain customers

Entertainment as an affordance within social media was used on several levels and Whiting and Williams (2013) described this as 'fun', which was a feature echoed by participants, in different generational cohorts, both with and without formal marketing qualifications. In addition to the keywords entertainment and fun, humour was also recognised.

However, whilst eleven participants embraced entertainment as an affordance within social media, this was not suitable for all business sectors and nine did not use social media for entertaining. A further six had mixed responses, for example, [CONTENT REDACTED TO PRESERVE ANONYMITY OF PARTICIPANTS] remarked that, ‘We should be, but we aren’t really, it’s more for education’ indicating their awareness of the concept. Figure 7.13 illustrates a quotation bank from participants about the application of social media for entertainment within their organisations which incorporates a thematic word cloud from QSR NVivo, with edited comments.

Figure 7.13 A quotation bank from participants commenting about the application of social media for entertainment within their organisations which incorporates a thematic word cloud from QSR NVivo

[CONTENT REDACTED TO PRESERVE ANONYMITY OF PARTICIPANTS]

Thus entertainment is a recognised as an affordance by those using social media within their organisations, although the application varies. [CONTENT REDACTED TO PRESERVE ANONYMITY OF PARTICIPANTS] discussed the idea of sharing entertaining content from their customers, rather than creating their own content to amuse. [CONTENT REDACTED TO PRESERVE ANONYMITY OF PARTICIPANTS] felt that the organisation understood their customers sense of humour and subsequently parodied other content which increased their organic reach by ‘up to 50 per cent’.

Different approaches were taken by [CONTENT REDACTED TO PRESERVE ANONYMITY OF PARTICIPANTS] who used entertainment to engage at an emotional level with their customers. These participants demonstrated an understanding of their customers and whilst commenting about their organisational use of social media, rather than their personal usage, there was an emotional connection.

However, those participants that did not use social media for entertainment within their organisations, were digital immigrants. Table 7.7 shows examples of the differing levels of maturity applied to the affordance of entertaining customers via social media from participants in Research Phase Two, concerning the process within their organisation

Table 7.7 Examples of the differing levels of maturity applied to the affordance of entertaining customers via social media, from participants in Research Phase Two, concerning the process within their organisation

AFFORDANCES MATURITY LEVEL	STRATEGY	EXAMPLES OF EVIDENCE FROM PARTICIPANTS CONCERNING THEIR ORGANISATION
0. No activity, application avoided	Avoid use of entertainment online	No [not relevant for us]
1.Attempted application, no process in place	No process in place, trial and error	We don’t really entertain … if there’s a 30-second, 60-second video that shows people almost having fun rather than learning
2. Ad hoc and inconsistent application	Occasional use of entertainment, seasonal or event-based	Around holiday time, if there is anything interesting going on in the office that we would like to share that, a bit of fun or a photo of the dog
3. Basic application	Limited use of entertainment on a manual basis	[We have a] daily feed of positivity amongst all the kind of fake news … it’s kind of a form of entertainment, but try and do it in a very kind of positive and different way
4. Standardised and proactive application	Proactive use of entertainment and understand customers’ humour	[We are] engaging with customers on a level of emotion, a kind of emotional level so we try and kind of market a bit … more light-hearted in that retrospect, so that it’s … seen on their level, so … engaging with regards to the fun things at the times of the year

AFFORDANCES MATURITY LEVEL	STRATEGY	EXAMPLES OF EVIDENCE FROM PARTICIPANTS CONCERNING THEIR ORGANISATION
5. Integrated and agile application	Creative use of entertainment and staff empowered to contribute	[The team] have like a certain understanding of our customers' kind of sense of humour, so any time we would see kind of like a video from like one of the big sites ... we will … take it and put our spin on it, that will appeal to our users

Therefore whilst entertainment is an affordance of social media and as all levels of maturity were provided from the participants, the application depends upon the contextualised situation and relevance to the organisation. Thus having gained evidence from respondents in Research Phase One, that entertainment was an affordance, additional insights as to why this was has been provided by participants in Research Phase Two, and this confirms that entertainment is an affordance of social media marketing in organisations.

7.4.2 Main theme 1: Affordance - To provide offers (sales cycle)

Recognised by individuals as a use and gratification of social media (Whiting and Williams, 2013; Luchman, Bergstrom and Krulikowski, 2014), and Brandtzæg (2010, p. 952), termed these consumers 'instrumental users' as they had a clear objective for using social media when shopping. Muntinga, Moorman and Smit (2011), perceived this as remuneration – a reward for effort, although providing offers is an affordance within the sales cycle, was not embraced by all participants in this study.

Of the 26 participants, 13 did not run offers as it was believed to be irrelevant to the organisation, similar to entertainment, this was not suitable for all business sectors. However, one participant commented how their organisation had tried and failed to launch an offer on LinkedIn.

Six participants provided offers using social media for their organisations and another seven participants gave mixed observations which are discussed in the next section. The participants who provided offers via social media either provided occasional promotions, which were often triggered by a time of year, or focused on customer acquisition or retention. These offers centred around times of year or were intermittent and others offered customer exclusives. However, there was some confusion amongst participants as to the notion of an offer, as some perceived offers as promoting a benefit from a third-party [CONTENT REDACTED TO PRESERVE ANONYMITY OF PARTICIPANTS] or the opportunity to donate to a charity [CONTENT REDACTED TO PRESERVE ANONYMITY OF PARTICIPANTS], or click on a link to the website [CONTENT REDACTED TO PRESERVE ANONYMITY OF PARTICIPANTS]. Others considered offers as ways of promoting their business or running competitors with sponsored prizes.

Whilst there was a connection between the notion of an offer and the role of the brand [CONTENT REDACTED TO PRESERVE ANONYMITY OF PARTICIPANTS], there was a mismatch of understanding in equating an offer with a web-link. Thus some respondents indicated a lack of understanding of what the concept of an offer means to consumers. It was thought that this was based on marketing education. However, some of these participants possessed formal marketing qualifications [CONTENT REDACTED TO PRESERVE ANONYMITY OF PARTICIPANTS]. Table 7.8 shows examples of the differing levels of maturity applied to the affordance of providing offers via social media, from participants in Research Phase Two.

Table 7.8 Examples of the differing levels of maturity applied to the affordance of providing offers via social media, from participants in Research Phase Two, concerning the process within their organisation

AFFORDANCES MATURITY LEVEL	STRATEGY	EXAMPLES OF EVIDENCE FROM PARTICIPANTS CONCERNING THEIR ORGANISATION

AFFORDANCES MATURITY LEVEL	STRATEGY	EXAMPLES OF EVIDENCE FROM PARTICIPANTS CONCERNING THEIR ORGANISATION
0. No activity, application avoided	No use of offers online	• No we have never really done that • We don't see the need for doing offers and promotions
1.Attempted application, no process in place	No process in place, trial and error	• [We] did an offer … the great news is it … went completely viral, to the point where I had over 8,000 people reading these posts, which is fantastic, the problem was, no one took up the offer
2. Ad hoc and inconsistent application	Adding offers on ad hoc basis	• We do run various competitions at key times of the year ... Christmas, or in the summer
3. Basic application	Limited promotion, or sharing offers from other organisations	• We will put on Twitter as well once in a while … [a promotion] for members you have 10 per cent off if you go to that place, or if you do this or do that
4. Standardised and proactive application	Proactive promotion of offers	• To attract new customers with deals • Member discount
5. Integrated and agile application	Integrated and automated application	• We use Hootsuite to automate a lot of our organic content, so … we would have the offers in place by the end of the month

This study indicated that the application of offers in social media marketing was both an *ad hoc* or occasional activity, as well as a proactive approach with a specific goal.

Having gained evidence from respondents in Research Phase One, that offers – as part of the sales cycle - was an affordance, six out of twenty-six participants in Research Phase Two provided examples of when offers were used, although there continues to be a perception gap between organisations and consumers around the concept of offers. Thus offers within the sales cycle, is an affordance of social media marketing in organisations, that is applied with different levels of maturity.

7.4.3 Main theme 1: Affordance - To interact with customers

Reflecting on McQuail's (1983) mass communication theory where social interaction was identified as a key factor, this remains valid within a social media context. Extant literature has claimed that social media offers a method of two-way or multi-way interaction, sharing suggestions and providing feedback (Canhoto and Clark, 2013), although this engagement takes different forms as Figure 7.14 illustrates, incorporating some edited examples of participant quotations and a word cloud created from QSR NVivo 12.

Figure 7.14 A quotation bank from participants commenting about the application of social media for interaction within their organisations which incorporates a thematic word cloud from QSR NVivo

[CONTENT REDACTED TO PRESERVE ANONYMITY OF PARTICIPANTS]

Interaction includes engagement and incorporates a ‘multidimensional perspective’ encompassing cognitive, emotional, and/or behavioural factors (Hollebeek, Glynn and Brodie, 2014, p. 254). The literature review of social media definitions identified interaction as a key component which was identified in extant research as a key factor in the usage and gratification of social media by individuals (Shao, 2009; Muntinga, Moorman and Smit, 2011; Whiting and Williams, 2013; Luchman, Bergstrom and Krulikowski, 2014; Krishen *et al.*, 2016).

Within an organisational context, interaction was also called engagement (Argyris and Monu, 2015), or an ‘interactive experience’ (Hollebeek, Glynn and Brodie, 2014, p. 150), and several participants stated that their organisations were trying to reach their audience through interaction, and as a method of expanding their online communication [CONTENT REDACTED TO PRESERVE ANONYMITY OF PARTICIPANTS].

Closely linked to interaction was the theme of conversion as a behavioural activity. As [CONTENT REDACTED TO PRESERVE ANONYMITY OF PARTICIPANTS] commented ‘Our objective is about increasing engagement, driving, increasing volume of traffic to the social media channels to convert them to the website.’ Thus interaction has become a business objective within some organisations, although this requires management as whilst most participants had a positive perception of online interaction, one participant had experienced a negative perspective and mentioned that their audience [CONTENT REDACTED TO PRESERVE ANONYMITY OF PARTICIPANTS].

Table 7.9 provides examples of the differing application of affordances maturity scale in interacting with customers via social media from participants in Research Phase Two, and illustrates the different levels of interaction, from simple posts on social media, to ongoing monitoring resulting in an engagement metric.

Table 7.9 Examples of the differing levels of maturity applied to the affordance of interacting with customers via social media, from participants in Research Phase Two, concerning the process within their organisation

AFFORDANCES MATURITY LEVEL	STRATEGY	EXAMPLES OF EVIDENCE FROM PARTICIPANTS CONCERNING THEIR ORGANISATION
0. No activity, application avoided	Avoid use of interaction online	Not generally no, it wasn't out intention and it hasn't turned out that way, there is very little interaction on social media
1.Attempted application, no process in place	No process in place, trial and error	[We have] posted things on Facebook, and this type of thing
2. Ad hoc and inconsistent application	Watching but not fully interacting	It is … very just sort of rudimentary … what sort of time of day are people interacting with us, and things like that so we can kind of get some very basic data
3. Basic application	Reactive interaction	[Interaction tales place] through comments following posts on Facebook, has been the kind of predominant channel that that has happened through
4. Standardised and proactive application	Proactive interaction with process in place	[We are] working with them [another team], or advising them, to find ways to increase engagement on a B2B level, looking at LinkedIn, website, … Twitter, and see if we can get more engagement

AFFORDANCES MATURITY LEVEL	STRATEGY	EXAMPLES OF EVIDENCE FROM PARTICIPANTS CONCERNING THEIR ORGANISATION
5. Integrated and agile application	Integrated application with formal reporting	We all look at all the kind of posts we send out, what sort of engagement rating, engagement score and put together a … checkpoint report

Earlier in this study, using social media for interaction within their organisations was recognised as an affordance. This was evidenced through the experiences of 23 of the 26 participants in this study. Nevertheless, three participants did not use social media for interaction within their organisations, although one participant recognised the need to address this factor: [CONTENT REDACTED TO PRESERVE ANONYMITY OF PARTICIPANTS].

Having gained evidence from respondents in Research Phase One, that interaction was an affordance, additional evidence as to why there was a beneficial application of social media for interaction within their organisations has been provided by participants in Research Phase Two. Thus interaction is an affordance of social media marketing in organisations, that is applied with different levels of maturity.

7.4.4 Main theme 1: Affordance - To gain reviews

Customer reviews, whether testimonials or online ratings, concerning products or services, are an essential part of electronic word of mouth communications and the sales process. Furthermore, it is recognised that customers read reviews as ‘it reduces their uncertainty and helps them choose the best offering’ (Babić Rosario *et al.*, 2016, p. 314) and as such, they have commercial value (Mathews Hunt, 2015). Whilst Research Phase One demonstrated that digital natives were more likely to use social media for reviews, this featured across all generational cohorts in Research Phase Two. Figure 7.15 shows a word cloud with the most frequently mentioned words surrounding this theme.

Figure 7.15 Thematic word cloud from QSR NVivo with the most frequently mentioned words surrounding the application of reviews within organisations

The subject of reviews encompassed endorsements, testimonials, ratings, feedback and recommendations, thus participants provided evidence that their organisations were at different levels of obtaining reviews. Some had fully automated systems, whereas others would avoid online reviews. Table 7.10 shows examples of the differing levels of maturity applied to the affordance of obtaining reviews via social media, from participants in Research Phase Two.

Table 7.10 Examples of the differing levels of maturity applied to the affordance of obtaining reviews via social media, from participants in Research Phase Two, concerning the process within their organisation

AFFORDANCES MATURITY LEVEL	STRATEGY	EXAMPLES OF EVIDENCE FROM PARTICIPANTS CONCERNING THEIR ORGANISATION
0. No activity, application avoided	No intention to seek reviews via social media	There’s no sort of direct plan to attract testimonials [via social media]

AFFORDANCES MATURITY LEVEL	STRATEGY	EXAMPLES OF EVIDENCE FROM PARTICIPANTS CONCERNING THEIR ORGANISATION
1.Attempted application, no process in place	No process in place, trial and error	A few months ago, we took away the review function from our main page because it was just a place for people to rant about something that had nothing to do with a review
2. Ad hoc and inconsistent application	Inconsistent approach	I am pretty rubbish at asking for testimonials, it's one of my, could do better this year and my marketing manager keeps saying to me, we have got to get testimonials out there, especially obviously on LinkedIn
3. Basic application	Reactive approach	After … the purchase … we try to encourage them to go back to the social media, but for now we haven't created any content within the process
4. Standardised and proactive application	Proactive approach with process in place	We have had a strategy previously to get reviews on LinkedIn. A lot of the time we would request that after a project has finished, as part of our process we would ask the client, if they were happy, to leave us a review on one of the sites, so we build it into our standard processes
5. Integrated and agile application	Integrated and automated application	We work with Trustpilot for reviews, and we have very high scores. … the second we send an order out, there is … two-day delay and then the customer will automatically get an email, and then we will get a reminder email if it's not reviewed

This theme provided further variations of the application of reviews as a social media affordance, as whilst some participants within this study evidenced that their organisations actively solicited positive reviews, others were at very different levels of maturity as illustrated in Table 7.10.

Those classified as being at Level 5, had embedded the process into the organisation's sales and marketing system and this was an automated activity. The collection of reviews via automated systems is an area less explored in the marketing literature, although the system mentioned in this section, Trustpilot, is only available for verified purchases and thus perceived as more credible as the issue of 'authenticity in online reviews is … long-standing' (Kugler, 2014, p. 3). Furthermore, one of the participants responsible for social media in their organisation [CONTENT REDACTED TO PRESERVE ANONYMITY OF PARTICIPANTS], explained that they used this automated system to reduce the consideration set, described as 'choice anxiety' which has long been recognised as a factor in reducing risk in consumer behaviour (Taylor, 1974).

Those at Level 4, were seeking to enhance their process and were evaluating options for automation, with Trustpilot mentioned by three of the participants, responding on behalf of their organisations' method of collecting reviews. Level 3, concerned participants who reacted after an action, such as a purchase, to encourage the customer to provide a review.

Those participants in Level 2, were attempting to gain reviews, but the approach was impromptu. In one example [CONTENT REDACTED TO PRESERVE ANONYMITY OF PARTICIPANTS], this appeared to be due to the length of time that in-depth testimonials could take to obtain.

Level 1, was where reviews may be offered by customers, but was neither addressed nor acknowledged by the organisation. Distrust for reviews emerged, recognised by Reimer and Benkenstein (2016), as 'review skepticism' (p. 5993), where reviews are distrusted as they are created for ulterior motives. This perspective was confirmed by one participant who dismissed their value of online reviews [CONTENT REDACTED TO PRESERVE ANONYMITY OF PARTICIPANTS].

The least developed process, Level 0, was where organisations had positively indicated that they had no intention to seek reviews via social media, although Mills and Plangger (2015), suggested that empowered customers who created content for organisations were the essence of social media. However, the issue of reviews, as a key element of customer-created content, created concern. Some of those responsible for marketing actively avoided, rather than managed, potential negative social media (Mangold and Faulds, 2009), failing to understand the potential for negative word of mouth to become a valuable element in purchase decisions (Bachleda and Berrada-Fathi, 2016).

Another issue raised, albeit voiced by one participant, connected to their organisation, was concern regarding the negative impact of reviews. Hennig-Thurau *et al.* (2004, p. 39), defined the notion of eWOM communication as ‘any positive or negative statement made by potential, actual, or former customers about a product or company, which is made available … via the Internet’ and online reviews, whether positive or negative, are part of this phenomenon. Whilst positive reviews can enhance a brand’s online position (Gensler *et al.*, 2013; Arnaboldi and Coget, 2016), negative reviews can result in financial damage to organisations (Gensler *et al.*, 2013). Positive eWOM is more likely to be shared than negative eWOM, yet reviews that contain the emotions of ‘anxiety or anger’ will be widely communicated (Berger and Milkman, 2012, p. 202). This anger is recognised as venting or taking revenge (Gregoire, Salle and Tripp, 2015; McIntyre, McQuarrie and Shanmugam, 2015; Ibrahim, Wang and Bourne, 2017).

In one participant example [CONTENT REDACTED TO PRESERVE ANONYMITY OF PARTICIPANTS], the social media platform is a crowd-sourced user-generated content site with a focus on employee reviews, Glassdoor, which has been called TripAdvisor® for employees (Burt, 2018). Glassdoor encourages 'current and former employees (to) anonymously review companies and their management' (Dabirian, Kietzmann and Diba, 2017, p. 198). However, there is no verification that the reviewer does or did work at the organisation. Furthermore, according to Dabirian, Kietzmann and Diba (2017) the reviews are largely negative and this observation was echoed by a participant who was responsible for the monitoring of the organisation's brand online and was dissatisfied with the platform. Actions that organisations should take, according to extant research (Gregoire, Salle and Tripp, 2015; Ghosh, 2017; Melancon and Dalakas, 2018; Stevens *et al.*, 2018), include monitoring their brand online and subsequently responding rapidly. In this example, the participant's organisation was monitoring mentions, and responding to negative reviews, but feeling that this had no impact.

Whilst eight of the 26 participants did not seek endorsements via social media, gaining online reviews are critical for organisations as they contribute directly to the sales cycle (Saboo, Kumar and Ramani, 2016). This was summarised by [CONTENT REDACTED TO PRESERVE ANONYMITY OF PARTICIPANTS].

Having gained evidence from respondents in Research Phase One, that reviews were recognised as an affordance, additional confirmation as to why this was has been provided by participants in Research Phase Two, and thus reviews is an affordance of social media marketing in organisations, that is applied with different levels of maturity, from avoidance to a fully integrated approach.

7.4.5 Main theme 1: Affordance - To deliver customer service

Social media continues to grow as a customer service channel as consumers have identified the benefit of online brand conversations (Baird and Parasnis, 2011; Pletikosa-Cvijikj and Michahelles, 2013; Melancon and Dalakas, 2018). Figure 7.16 illustrates the word cloud and edited examples of participant quotations relating to their organisations.

Figure 7.16 A quotation bank from participants commenting about the application of social media for customer service within their organisations which incorporates a thematic word cloud from QSR NVivo

[CONTENT REDACTED TO PRESERVE ANONYMITY OF PARTICIPANTS]

The differences which emerged regarding customer service vacillated at a binary level; either a proactive or a reactive response. A study conducted by Hamilton, Kaltcheva and Rohm (2016a) identified that managers ‘should consider both platform choice and customer motives… as they seek to … address customer service issues’ (p. 142). The notion of platform choice had been considered by some participants who adopted a proactive approach, according social media the same attention for customer service as other means, by embedding customer service via social media networks into their standard operating procedures, as shown in Table 7.11.

Table 7.11 Platforms and queries observed by participants commenting about the application of social media for customer service within their organisations

PLATFORMS	CASE	AUDIENCE	NATURE OF CUSTOMER SERVICE QUERY
Twitter, Facebook and LinkedIn	[CONTENT REDACTED TO PRESERVE ANONYMITY OF PARTICIPANTS]	Customers	Support queries
Twitter and Facebook		Stakeholders	Various
Facebook		Potential customers	Asking for information

The notion of online customer service which was recognised by 21 of the 26 participants, including those in this section. One participant remarked about the recent increase in queries from social media and Table 7.12 shows examples of the differing application of affordances maturity scale in managing customer service via social media from participants in Research Phase Two, concerning the process within their organisation.

Table 7.12 Examples of the differing levels of maturity applied to the affordance of managing customer service via social media, from participants in Research Phase Two, concerning the process within their organisation

AFFORDANCES MATURITY LEVEL	STRATEGY	EXAMPLES OF EVIDENCE FROM PARTICIPANTS CONCERNING THEIR ORGANISATION
0. No activity, application avoided	No customer service issues addressed online	We tend to avoid [online customer service] if we can
1.Attempted application, no process in place	No process in place, trial and error	We can answer questions on [social media] …I've got a question about … and we can give them answers from a [third party]
2. Ad hoc and inconsistent application	Ad hoc customer service management	We have [responded to customer queries via social media], but it's more ad hoc than regular

AFFORDANCES MATURITY LEVEL	STRATEGY	EXAMPLES OF EVIDENCE FROM PARTICIPANTS CONCERNING THEIR ORGANISATION
3. Basic application	Reactive management of customer service	We don't push our customer service via social channels, but … if someone encounters us via our social channels, we can provide a better level of service if we can
4. Standardised and proactive application	Proactive management of customer service	We have standard responses and a bank of standard replies for Facebook messages We would take a support query through any of the channels including Twitter, Facebook, and LinkedIn
5. Integrated and agile application	Integrated and automated application	We use Microsoft flows … every single kind of interaction that we have on Twitter an email gets sent to ourselves … one of our teams who are constantly sending messages out

Thus, having gained evidence in Research Phase One, that customer service was an affordance of social media, Research Phase Two has provided further detail. Thence customer service is an affordance of social media marketing in organisations, that is applied with different levels of maturity, which included the reactive approach, responding where needed and a more sophisticated proactive application of customer service which, in some cases, included formal processes and automation.

7.4.6 Main theme 1: Affordance - For new product development

Whilst new product development was identified as an affordance of social media, in so much as the platforms could facilitate access to market and product research, 22 of the participants did not use social media as part of their new product development strategy.

However, four of the participants provided evidence of using social media as part of the new product development process. Although they largely described conducting research through social media rather than developing or co-creating new products or services. This resonates with earlier research where product features could be developed through social media mining (Rathore, Ilavarasan and Dwivedi, 2016). This was demonstrated by [CONTENT REDACTED TO PRESERVE ANONYMITY OF PARTICIPANTS].

Table 7.13 shows examples of the differing levels of maturity applied to the affordance of new product development via social media, from participants in Research Phase Two. The notable factor is that so few participants used social media for new product development within their organisations, which may be a missed opportunity. Reasons for not using social media for new product development focused on the concern of sharing content with competitors and the perception that this may not be appropriate for their organisation.

Table 7.13 Examples of the differing levels of maturity applied to the affordance of new product development via social media, from participants in Research Phase Two, concerning the process within their organisation

AFFORDANCES MATURITY LEVEL	STRATEGY	EXAMPLES OF EVIDENCE FROM PARTICIPANTS CONCERNING THEIR ORGANISATION
0. No activity, application avoided	No new product development online	- Not used
1.Attempted application, no process in place	No process in place, trial and error	- No evidence found
2. Ad hoc and inconsistent application	Ad hoc research	- We looked at all of our competitors what kind of posts they did with regards to [certain products], how they kind of marketed it via social media channels and obviously we then tried to replicate that

AFFORDANCES MATURITY LEVEL	STRATEGY	EXAMPLES OF EVIDENCE FROM PARTICIPANTS CONCERNING THEIR ORGANISATION
3. Basic application	Basic research of potential product opportunities	• When we are looking for new products that we want to bring into the business, so these are existing products that third parties would provide, we would look them up on social media, we would look at discussions around it
4. Standardised and proactive application	Proactive approach to new product development	• No evidence found
5. Integrated and agile application	Integrated and automated application	• No evidence found.

Having gained evidence from Research Phase One, that using social media as part of the new product development process was an affordance, additional verification as to why, was sought from the participants in Research Phase Two. However, this was not obtained. These participants demonstrated an *ad hoc* or basic approach to gathering research, yet this was not a proactive approach to the recognised new product development process (Chang and Taylor, 2015), more a basic step in conducting initial research. Thus the participants failed to provide confirmation of new product development as a social media affordance, within their organisations' application of social media marketing.

7.4.7 Main theme 1: Affordance - For customer segmentation

Within a social media context, the literature review classified user behaviours within online groups (see Table 2.3) and additionally customers can be clustered based on their behaviour, such as the visit status - new or repeat (Waite and Perez-Vega, 2018), whether they are registered or not registered customers, those who respond to specific online campaigns (Sponder and Khan, 2018), and those who are members or belong to particular groups or tribes (Dahl, 2018). Consequently segmentation of customers within social media centres on behaviours - including interaction - and evidence from Research Phase One, indicated that this was an affordance for social media.

Therefore this was explored further in Research Phase Two. This demonstrated that whilst recognised, customer segmentation was not well developed by the participants. Table 7.14 shows examples of the differing levels of maturity applied to the affordance of customer segmentation via social media, from participants in Research Phase Two. Whilst no examples of customer segmentation were found at Level 5, there were several examples identified at Level 4, where these organisations had adopted a proactive and formalised approach to customer segmentation.

Table 7.14 Examples of the differing levels of maturity applied to the affordance of customer segmentation via social media, from participants in Research Phase Two, concerning the process within their organisation

AFFORDANCES MATURITY LEVEL	STRATEGY	EXAMPLES OF EVIDENCE FROM PARTICIPANTS CONCERNING THEIR ORGANISATION
0. No activity, application avoided	No application of customer segmentation online	No use of customer segmentation online
1.Attempted application, no process in place	No process in place, trial and error	We're trying to do is to reach out to more people. We still haven't actually got a handle on this

AFFORDANCES MATURITY LEVEL	STRATEGY	EXAMPLES OF EVIDENCE FROM PARTICIPANTS CONCERNING THEIR ORGANISATION
2. Ad hoc and inconsistent application	Ad hoc approach to customer segmentation	We are in the process of doing [segmentation] … it is something we have been aware of the possibility of doing, and we are looking at doing, for example a Facebook advertising campaign for the first time … part of the benefit of that is to be able to control better who sees them and engages with what we want to be seen and engaged with, so I would say we are kind of at an early stage
3. Basic application	Reactive approach to customer segmentation	Mainly that's email side, so hot and warm subscribers, [other] subscribers
4. Standardised and proactive application	Proactive approach to customer segmentation	We have actually just started focusing on our audiences, our personas and how we actually engage with them … we … try to profile … who our customers are … we are going to pull together a whole kind of profile on platforms, and then tie it in a bit more with our segmentation
5. Integrated and agile application	Integrated and automated application	No evidence found.

Of the participants, 14 stated they did not use social media for customer segmentation whilst the remaining 12 did, and thus the rationale as to why customer segmentation was not employed more, appeared to be lack of understanding. Whilst several participants suggested that their organisations segmented customers within social media, however, their explanations were more akin to 'Identifying and profiling groups of customers' (Canhoto, Clark and Fennemore, 2013, p. 414), that would not necessarily contribute to developing detailed customer profiles and identifying segment attractiveness, as shown in Table 7.15.

Table 7.15 Segmentation via social media applied by participants in Research Phase Two, concerning the process within their organisation

PLATFORM	PURPOSE	SEGMENTATION GAINED	CASE EXAMPLES
Email management system	To segment hot and warm subscribers	Email subscriber behaviour	[CONTENT REDACTED TO PRESERVE ANONYMITY OF PARTICIPANTS]
Google Analytics	To track the location of web visitors	Insights into geographic location	
Facebook Insights	To measure content engagement	Insights into successful and weak content but no customer segmentation	
Facebook Insights	To view basic details of Facebook visitors	Insights into basic demographics (age in groups, gender)	
Facebook Adverts	To segment adverts based on customer and non-customer, re-targeting those interested	Segments of purchasing behaviour	
LinkedIn	To use as a research tool to segment audiences	Richer insights into customer profiles	
Twitter	To look at followers and follow back	Richer insights into customer profiles	

As discovered in extant research (Canhoto, Clark and Fennemore, 2013), these participants are gaining insights into their customers and behaviours in certain situations. Whilst the basic insights provide limited demographics such as gender and age, this is based on self-reporting - the age the user has provided to the social media platform and one participant had noted that this could be erroneous.

Therefore there is a range of approaches based on the social media affordances maturity scale and moreover, two participants had identified and segmented their customers to such depth that they had created personas (Hendriks and Peelen, 2013).

Thus having gained evidence from Research Phase One, that customer segmentation was an affordance, additional evidence to explicate the use of social media to segment customers illustrated a superficial application within the participants in Research Phase Two, centred around gaining customer insights. Thus whilst customer segmentation is an affordance of social media marketing in organisations, it is applied with different levels of maturity and it has been noted that this area requires further research (Canhoto, Clark and Fennemore, 2013), which may apply to organisations as well as academia.

7.4.8 Main theme 1: Affordance - For brand management

This element considered the panoply of brand management, including: brand awareness, brand building and brand recognition. Gaining brand attention online has been recognised by scholars (Jansen *et al.*, 2009; Gensler *et al.*, 2013; Wattanacharoensil and Schuckert, 2015) and all participants used social media as part of their brand management, as Figure 7.17 illustrates, incorporating some edited examples of participant quotations and a word cloud created from QSR NVivo 12.

Figure 7.17 A quotation bank from participants commenting about the application of social media for brand management within their organisations which incorporates a thematic word cloud from QSR NVivo

[CONTENT REDACTED TO PRESERVE ANONYMITY OF PARTICIPANTS]

Whether social media was being used for brand management (Gensler *et al.*, 2013), to increase brand awareness (Wattanacharoensil and Schuckert, 2015), or being present online (Argyris and Monu, 2015), or for brand promotion (Jansen *et al.*, 2009; Aladwani, 2015), all participants, except one - [CONTENT REDACTED TO PRESERVE ANONYMITY OF PARTICIPANTS], used social media as part of their application of brand management. The levels of maturity ranged from no application at Level 0, to those participants who at Level 4 understood different brand constructs such as tone of voice and brand values, and those who empowered staff at Level 5. Table 7.16 provides examples of the differing levels of maturity applied to the affordance of brand management via social media, from participants in Research Phase Two.

Table 7.16 Examples of the differing levels of maturity applied to the affordance of brand management via social media, from participants in Research Phase Two, concerning the process within their organisation

AFFORDANCES MATURITY LEVEL	STRATEGY	EXAMPLES OF EVIDENCE FROM PARTICIPANTS CONCERNING THEIR ORGANISATION
0. No activity, application avoided	No application of brand management online	Not really so important to my business
1.Attempted application, no process in place	No process in place, trial and error	I think it’s just about getting our name out in front of … existing ones, but also getting in front of potentially new clients

AFFORDANCES MATURITY LEVEL	STRATEGY	EXAMPLES OF EVIDENCE FROM PARTICIPANTS CONCERNING THEIR ORGANISATION
2. Ad hoc and inconsistent application	Brand management on limited basis	It's more feeling that we need to be out there ... we wanted [clients] to see that we are out there, that we are digitally aware, that we are … not stuck in the dark ages
3. Basic application	Reactive approach to brand management online	I sort of feel you have to have at least a presence on there. So I am really not active on Twitter, but we just do keep stuff going on
4. Standardised and proactive application	Proactive approach to brand management online and aware of brand constructs	[We communicate with] a corporate voice … we'd rather present ourselves as a team … we are … looking at more of an identification, we are also looking at brand values as well, tone of voice is one of those things
5. Integrated and agile application	Integrated application with empowered staff	[We] try and ask our people to have a sense of personality to their tweets and to their tone of voice … [it is] more around amplifying existing marketing activities … [and] from brand management

The notion of being visible in search results struck a chord with several participants, one remarked: 'when I am researching products, and companies and services, to see they have no social media, I think is a negative, so they are on minus points already' [CONTENT REDACTED TO PRESERVE ANONYMITY OF PARTICIPANTS].

Having gained evidence from respondents in Research Phase One, that brand management was an affordance, additional evidence as to why, was provided by participants in Research Phase Two. Thus brand management and the associated notion of online visibility is an affordance of social media marketing in organisations, that is applied with different levels of maturity.

7.4.9 Main theme 2: Social media strategy - Measure

Whilst not an affordance, a recognised challenge of social media implementation is performance measurement (Valos *et al.*, 2015). Whether measuring results or value from social media, some participants, mainly those with formal marketing qualifications, had a procedure or understood what was required, others were struggling to understand or usefully apply the data. Figure 7.18 illustrates the word cloud and edited examples of participant quotations relating to their organisations.

Figure 7.18 A quotation bank from participants commenting about the measurement of social media within their organisations which incorporates a thematic word cloud from QSR NVivo

[CONTENT REDACTED TO PRESERVE ANONYMITY OF PARTICIPANTS]

As identified in the literature review, measurement in social media is often not understood. Whilst the Interactive Advertising Bureau (2009) defined some social media metrics, there is no common standard (Misirlis and Vlachopoulou, 2018). Measuring social media frequently focused on the large numbers such as website hits,[10] impressions[11] or likes, which, whilst they may appear remarkable, are considered weaker and are often referred to as 'vanity' metrics (Rogers, 2018). Some participants, mainly digital immigrants, adopted these weaker metrics whilst trying to formulate the best approach for their organisations, as highlighted in Table 7.17. It was observed that vanity metrics were employed by those without formal marketing qualifications.

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[10] A hit is a request to a server file to download an item onto a web page, but a web page could contain multiple files, thus one unique visitor could be classed as 20 hits.
[11] An impression is the number of times an individual has seen an advert or other item, but they may not have 'seen' it, simply scrolled past whilst browsing.

Table 7.17 Vanity metrics measured by participants within their organisations, highlighting generational cohort and presence or absence of formal marketing qualifications

METRICS USED	CASE EXAMPLES	GENERATIONAL COHORT		FORMAL MARKETING QUALIFICATIONS	
		Digital native	***Digital immigrant***	***Present***	***Absent***
Page likes and followers	[CONTENT REDACTED TO PRESERVE ANONYMITY OF PARTICIPANTS]				
Followers, engagement and interactions					
Number of hits, impressions					
LinkedIn Insights					
Click throughs to website					
Basic tracking					
To see the trends					

Two participants from the same organisation, [CONTENT REDACTED TO PRESERVE ANONYMITY OF PARTICIPANTS], did not measure social media in any form and thus had not commenced the application of social media measurement.

According to Fan and Yan (2015, p. 761) ‘social media analytics generally involve three stages: capture, understand, and present’ and whilst several participants have procedures in place to capture vanity metrics, click-throughs and engagement levels, there is a lack of understanding and thus the procedure falters. Whilst there were no differences between generational cohorts, those who did capture, understand and present social media metrics within their organisations were mainly those with formal marketing qualifications, as shown in Table 7.18.

Table 7.18 Metrics captured, understood and presented by participants within their organisations, highlighting generational cohort and presence or absence of formal marketing qualifications

CAPTURE	UNDERSTAND	PRESENT	CASE	GENERATIONAL COHORT		FORMAL MARKETING QUALIFICATIONS	
				Digital native	***Digital immigrant***	***Present***	***Absent***
We measure everything	Use UTM[12] parameters to monitor traffic	Use Google drive to share results at the end of the month	[CONTENT REDACTED TO PRESERVE ANONYMITY OF PARTICIPANTS]				
Combination of Google Analytics and visual analytics software	Used Hootsuite and SproutSocial and the built-in analytics	Report every month describing the trends					
Analyse everything	Engagement rating, engagement score	Online analysis pack					
Track the success of the individual social elements	Correlate our engagement levels	Dashboard					
Web visits	Result is a search on social media, and the person then [buys]						
Analytics - hits on LinkedIn and Facebook page	Very few were clicking through to the blog						
Top line level	Trying to figure out how it all connects to website and email						
Look at the analytics	To make sure that we adapt and that we understand why this has worked, why this hasn't						
We look at engagement metrics	It's more than awareness, and more than likes and even more than shares						
We can get some very basic data	We want to see what gets shares and liked - to expand our reach						

[12] UTM is the Urchin Tracking Module – code that enables analytics programmes to recognise the source of the web visitor.

Examples of these differing levels of maturity applied to measuring social media, from participants in Research Phase Two, are shown in Table 7.19.

Table 7.19 Examples of the differing levels of maturity applied to measuring social media, from participants in Research Phase Two, concerning their organisation

AFFORDANCES MATURITY LEVEL	STRATEGY	EXAMPLES OF EVIDENCE FROM PARTICIPANTS CONCERNING THEIR ORGANISATION
0. No activity, application avoided	No metrics considered	Not measured
1.Attempted application, no process in place	Some attempt to measure vanity metrics	There's the surface level vanity metrics … page likes and followers
2. Ad hoc and inconsistent application	Inconsistent measurement of vanity metrics	[We measure] not on a granular level, and not sort of on a daily level, we will look over periods of months just to see is the trend up … down
3. Basic application	Metrics are captured, lacks formal process	We … measure followers and engagement and interactions using the analytics available in each of the social media platforms …with our Google AdWords campaign we can track conversions, but again they've not really been set up right, so that's [like] trying to unpick a massive jumper
4. Standardised and proactive application	Metrics are captured, understood and presented to others	I use a combination of Google Analytics and visual analytics software, and then I'll make a report every month describing the trends Every single piece of communication that we send out digitally we can track it … we put it onto a graph… and that gets sent out to the leadership team

AFFORDANCES MATURITY LEVEL	STRATEGY	EXAMPLES OF EVIDENCE FROM PARTICIPANTS CONCERNING THEIR ORGANISATION
5. Integrated and agile application	Metrics are captured, understood and presented to management within an automated system	) We track the success of the individual social elements, and the social engagements … We know … because [we can see this in the] dashboard [but] we are not at the stage where we can directly correlate our engagement levels, or our Facebook reach with our membership numbers

Identified as a critical factor and as a strategic process within social media, measurement of social media is recommended (Kiron *et al.*, 2012; Mills and Plangger, 2015; Duane and O'Reilly, 2016), and can be challenging (Werder, Helms and Slinger, 2014). The application of the three-stage capture, understand and present process (Fan and Yan, 2015), demonstrated that these participants had captured and understood the analytics, as shown in Table 7.18. Few participants had organised formal reporting and those that had, met the criteria for Level 4, in the social media affordances maturity scale. Those that had not established these processes, met the criteria for Levels 1 or 2. This resonated with findings in the literature review, which identified that measurement was recognised as a gap requiring further research. The two participants at Level 0, were digital immigrants without formal marketing qualifications.

Having gained evidence from Research Phase One, where there was a statistically significant association between generational cohorts and those with and without formal marketing qualifications, participants in Research Phase Two, provided evidence as to why, which centres around understanding – or not – of the metrics and how these are applied to their organisations.

However, social media metrics that are relevant and useful can provide valuable data to inform organisations (Sweetwood, 2016; Sponder and Khan, 2018) and should be shared with management and across all teams within an organisation (Sterne, 2010; Duane and O'Reilly, 2016). Thus measurement is a critical factor of social media marketing in organisations, that is applied with different levels of maturity.

7.4.10 Main theme 2: Social media strategy - Resources

The strategy theme incorporated consideration of the resources required, the processes adopted and how it was integrated into the business. The findings were that resources was unsurprisingly mixed between a single individual in the organisation managing social media, to large teams.

However, some participants in Research Phase Two mentioned the issue of budgeting [CONTENT REDACTED TO PRESERVE ANONYMITY OF PARTICIPANTS]. Therefore budget is an area that is dependent upon the type of organisations in terms of legal entity (for example, commercial organisation or charity) as well as size. Equally there is the issue of staffing, which is dependent on size of organisation. Whilst outsourcing has been established in a digital environment (ATOS, 2017), another solution was training internal staff to manage social media, which had been addressed by one of the participants in Research Phase Two [CONTENT REDACTED TO PRESERVE ANONYMITY OF PARTICIPANTS]. A further aspect of resources is management involvement and understanding, which was identified by several participants ([CONTENT REDACTED TO PRESERVE ANONYMITY OF PARTICIPANTS].

However, resources as a critical factor was not confirmed in the Research Phase Two.

7.4.11 Main theme 2: Social media strategy - Strategy

Whilst not an affordance, the development and implementation of a social media strategy is a critical factor which was identified in the extant literature. Mills and Plangger (2015) recommended a phased approach to building a social media strategy whereas Duane and O'Reilly (2016), included strategy as an indicator of the business growth stage in social media adoption. However, there is a lack of research into the area of social media strategy (Cawsey and Rowley, 2016; Keegan and Rowley, 2017). When asked about their social media strategy this encouraged participants to reflect. Thus strategy is explicated in the social media affordances maturity scale where the levels varied, as shown in Table 7.20.

Table 7.20 Examples of the differing levels of maturity applied to the presence of a social media strategy from participants in Research Phase Two, concerning their organisation

AFFORDANCES MATURITY LEVEL	STRATEGY	EXAMPLES OF EVIDENCE FROM PARTICIPANTS CONCERNING THEIR ORGANISATION
0. No activity, application avoided	No strategy in place	No strategy in place
1.Attempted application, no process in place	Some attempt to develop a strategy or tactics in place	It's not hugely detailed, but yes we have a plan of actions
2. Ad hoc and inconsistent application	Strategy being developed	We are actually developing that now … with a social media consultant
3. Basic application	Basic strategy with limited planning and reporting	Every month I do a board report on you know marketing, where we are and social media obviously has a section within that report
4. Standardised and proactive application	Formal strategy in place	[We] have … a formulated kind of strategy [that links to content and informs planning] … we also have an internal intranet as well, so we include that in it as well
5. Integrated and agile application	Integrated strategy throughout the organisation	No evidence found.

Many participants had experienced Level 1 and [CONTENT REDACTED TO PRESERVE ANONYMITY OF PARTICIPANTS] commented that they had tried all platforms at the start. Since then they had developed objectives as to what was required from social media for their organisations.

None of the participants were at Level 5, which confirmed the work by Duane and O'Reilly (2016). In this study, of the 26 participants, 14 had a social media strategy in place and a further five were working on this; seven had no strategy. There were no discernible differences between generational cohorts and the presence or absence of formal marketing qualifications.

The literature review demonstrated that the presence of a strategy was a critical factor within social media, which was evidenced by respondents in Research Phase One, although there was no statistically significant association between generational cohorts and those with and without formal marketing qualifications. Research Phase Two illustrated why and based on the social media affordances maturity scale, this is work in progress for many participants.

7.4.12 Main theme 3: Critical Incident

Following a pragmatic approach, this study aims to investigate social media marketing within organisations in order to identify critical success factors and develop a framework for social media application in organisations and thus needed to identify methods of addressing quotidian challenges faced by organisations. Therefore, to uncover additional factors encountered by the participants within their organisations, the critical incident technique was employed, often used in qualitative research such as interviews (Bryman and Bell, 2011), and recognised in the domain of marketing (Ramseook-Munhurrun, 2016).

Bryman and Bell (2011), discussed part of the process of the critical incident technique as involving a 'sequence' in terms of behaviour (p. 219). Easterby-Smith, Thorpe and Jackson (2008), suggested that a criticism of the technique is the lack of the clear memory and Butterfield *et al.* (2005), suggested that ensuring the accuracy of an incident was a factor. However, within a social media online environment, this concern is mitigated as the examples can be verified with an online search. Furthermore, several participants remarked that the content was still online, months or years after the event occurred. The technique considers extreme situations to discover what had occurred and the outcome, with any learning benefits for the future, which fits with a pragmatist epistemology and ontology. Providing guidelines, Flanagan (1954, p. 338), stated that the critical incident should include ’information about the place, the persons, the conditions, and the activities’. Therefore participants were asked whether they could ‘think of a time when a customer shared a particularly satisfying or dissatisfying experience online?’ If they could, they were asked to describe the event in more detail, as discussed in Chapter 5.

Two participants provided positive examples and whilst these did not harm the organisation, they were examples of ‘stories that benefit the brand’ (Gensler *et al.*, 2013, p. 243). Nine participants from eight organisations had encountered situations where crisis management had to be employed. These critical incidents centred around [CONTENT REDACTED TO PRESERVE ANONYMITY OF PARTICIPANTS]. These are illustrated in the Table 7.21.

Table 7.21 Evidence from Research Phase Two with participant examples of critical incidents within their organisations

[CONTENT REDACTED TO PRESERVE ANONYMITY OF PARTICIPANTS]

Unhappy customers understand the power of social media and its impact when making a complaint (Shih, Lin and Luarn, 2014; Gregoire, Salle and Tripp, 2015). The two participants that shared details on customers sharing dissatisfaction about the organisations, demonstrated how control of the brand has moved from the organisation to the customer, a challenge noted earlier in the literature review (Bacile, Ye and Swilley, 2014). Another observation is that whilst Istanbulluoglu (2017), mentioned that *how* complaints are handled impacts consumers' memories of incidents, in these examples where 'the persons' are unhappy customers, both incidents occurred many months before the interviews, yet the participants recalled vividly the negative impact on the organisations and how this was addressed.

Staff and their families can create a social media crisis, whether trying to share humour or support a family member. Equally, comedy on social media from organisations can backfire (Opgenhaffen and d'Haenens, 2015), and regardless of whether there are staff guidelines in place (O'Connor, Schmidt and Drouin, 2015), it is difficult to apply to an entire team and impossible to enforce upon a family member. Whilst there were examples involving staff-related errors, the need to adapt organisational culture and understand the inappropriate use of social media (Valos *et al.*, 2015), was noted as a challenge for organisations in the literature review. The solution, as recommended by O'Connor, Schmidt and Drouin (2015), is that social media policies and training are needed. However, training may need to extend to explain the impact of online communications from unhappy family members.

Celebrities have been recognised as a vehicle for building brand attention (McCracken, 1989; Erdogan, 1999), and as a method of improving marketing communications (Bergkvist and Zhou, 2016). Equally the brand's status can be diminished where there are negative social media messages concerning celebrities (Chung and Cho, 2017), or if source attractiveness is not present (Seiler and Kucza, 2017). These examples of critical incidents from participants where well-known people were involved expounded that the association between a brand and a celebrity, however well-intentioned, can result in an online crisis. Moreover, this raises the issue of strategic role clarity, discussed in the literature review, where organisations fail to understand the scope of social media (Felix, Rauschnabel and Hinsch, 2017). Whereas there was no distinction between the generational cohorts and the presence or absence of formal marketing qualifications, in these incidents involving celebrities, there was a connection with the age of the organisation, as all were established before 1980.

The most serious example of a critical incident was with [CONTENT REDACTED TO PRESERVE ANONYMITY OF PARTICIPANTS]. The strength of customers claiming to represent the entire stakeholder group has been recognised (Killian and McManus, 2015), as has the ability of disgruntled customers to widely share negative content about a brand online (Mangold and Faulds, 2009), which can have a major impact. Whilst this was an example of an isolated case within these participants, the consequences involved a decision change with financial consequences.

Whilst ‘social media has enabled the public to participate actively in crisis communication’ (Zheng, Liu and Davison, 2017, p. 56), the online community might support the organisation, as the examples of [CONTENT REDACTED TO PRESERVE ANONYMITY OF PARTICIPANTS] demonstrated. As [CONTENT REDACTED TO PRESERVE ANONYMITY OF PARTICIPANTS] stated, ‘marketing’s changed so much recently and particularly the marketing model.’

These critical incidents illustrated that whilst there are affordances from social media for organisations, there are potential risks and challenges, as identified in the literature review. Thus the role of management should be clarified. Advance planning through the development of a comprehensive social media strategy could serve to reduce these risks as ‘developing a mitigation plan during a social media firestorm can leave employees and the company scrambling for an acceptable response’ (Killian and McManus, 2015, p. 547). The critical incident technique was useful to ascertain whether additional factors in social media marketing within organisations occurred, although no further factors were identified.

7.5 Emerging themes

Having reviewed the interview data for the presence of the *a priori* themes, the data was further examined to identify emerging themes. Therefore, the process of discovering emerging themes commenced with the research questions. As a pragmatist epistemology seeks practical meaning with a focus on 'problem solving… to inform future practice' (Saunders *et al.*, 2016, p. 137) the notion of digital differences between generational cohorts and those with and without formal marketing qualifications was problematised. This offered an area for further reflection - which is recommended within the process of thematic analysis (Saunders *et al.*, 2016), and involved exploring relationships of age and qualifications between the individual participants and their agency, as within thematic analysis, the 'primary concern is with presenting the stories and experiences voiced by study participants as accurately and comprehensively as possible' (Guest, MacQueen and Namey, 2012, p. 16).

Thus, this review resulted in the identification of four emerging themes: (i) age and ability; (ii) attitude to social media; (iii) attitude to marketing education and (iv) concern using social media. These were 'more idiographic in nature, more closely tied to behavior, and more highly contextualized' (Baumgartner, 2002, p. 287), and are discussed in this section.

7.5.1 Emerging theme 1: Digital differences - Age and ability

One difference concerned the age of those using and employing social media. Digital immigrants were aware of their customers' ages and who was using which social media platform. Another difference connected to age which emerged was ability and the notion that younger people were better at using social media. Figure 7.19 illustrates a quotation bank with edited examples from participants and a thematic word cloud from QSR NVivo.

Figure 7.19 A quotation bank from participants commenting about their observations of the demographic of those using social media as well as their own ability to apply social media within their organisations which incorporates a thematic word cloud from QSR NVivo

[CONTENT REDACTED TO PRESERVE ANONYMITY OF PARTICIPANTS]

The digital differences connected to age and ability of social media usage, as shown in Figure 7.19, were only noted by digital immigrants, who displayed a lack of confidence in their ability.

In Research Phase Two, users' ages or ability was not a topic of conversation with digital natives. Whilst the digital natives did not comment on their ability or the demographics of those using social media, they demonstrated competent use of online metrics within their organisations and they are using Google Analytics, to such a level that some are adapting or combining social media analytics to gain better reporting. The notion of combining was identified in Chapter Three (Vuori and Jussila, 2016) and in this cluster they demonstrated confident hands-on use of tools (e.g. Hootsuite) and demonstrated skilful use of applications for other purposes. Table 7.22 shows the technology used by participants within their organisations, highlighting that these digital natives all possess formal marketing qualifications.

Table 7.22 Technology used by participants within their organisations, highlighting generational cohort and presence or absence of formal marketing qualifications

[CONTENT REDACTED TO PRESERVE ANONYMITY OF PARTICIPANTS]

Thus these digital natives possessing formal marketing qualifications illustrated the ability to use different social media technologies at a personal level, although this is for application within their organisations.

Two digital immigrants without formal marketing qualifications lacked a comfortable use of the technology within their organisations [CONTENT REDACTED TO PRESERVE ANONYMITY OF PARTICIPANTS]. However, this contrasted with two digital natives without formal marketing qualifications [CONTENT REDACTED TO PRESERVE ANONYMITY OF PARTICIPANTS], who were confident to explore the social media environment and undaunted when seeking help online or from third parties.

7.5.2 Emerging theme 2: Digital differences - Attitude to social media

One factor not identified in the literature, nor in the refined thematic map (see Figure 5.10), which emerged from the data, was the positive attitude to social media from those managing and working in this environment. This was counter-balanced with negative sentiment from some participants at a personal level, as shown in Table 7.23.

Table 7.23 Attitude to social media by participants at a personal level, highlighting generational cohort and presence or absence of formal marketing qualifications

ATTITUDE			**GENERATIONAL COHORT**		**FORMAL MARKETING QUALIFICATIONS**	
POSITIVE	***NEGATIVE***	**CASE**	***DIGITAL NATIVE***	***DIGITAL IMMIGRANT***	***PRESENT***	***ABSENT***
I really love what I do you know … and I really love social media.		[CONTENT REDACTED TO PRESERVE ANONYMITY OF PARTICIPANTS]				
I really love it and for me because remember digital has come around since I started work.						
We were quite excited in the early days, the types of channels, to see what would happen … we obviously found it quite enjoyable as well.						
	B2B seems to be a little bit harder … I don't think … [our sector] …seems to be something that is really geared toward to social media use.					

ATTITUDE			GENERATIONAL COHORT		FORMAL MARKETING QUALIFICATIONS	
POSITIVE	***NEGATIVE***	**CASE**	***DIGITAL NATIVE***	***DIGITAL IMMIGRANT***	***PRESENT***	***ABSENT***
	Twitter it's just too time consuming, you can just spend all of your day talking to people and not actually getting anywhere.					
	Going through this journey has actually switched me off more to social media … I just find the whole thing rather false.					

The semi-structured interviews included more digital immigrants (n=20) than digital natives (n=6) and the digital difference is that all those expressing an attitude to social media, whether positive or negative, were digital immigrants.

7.5.3 Emerging theme 3: Digital differences - Attitude to marketing education

The third theme which emerged related to marketing education. These are idiographic accounts from participants, who were all digital natives.

Whilst motivation is a leitmotiv within social media usage (McQuail, 1983; Muntinga, Moorman and Smit, 2011; Krishen *et al.*, 2016), and had been identified as a factor for individual users within the literature review, this has not been fully addressed when applied within an organisational setting. However, in this context, the motivation concerned the individuals rather than their organisations. One of the participants [CONTENT REDACTED TO PRESERVE ANONYMITY OF PARTICIPANTS]. Two participants with prior qualifications were [CONTENT REDACTED TO PRESERVE ANONYMITY OF PARTICIPANTS]. These digital natives demonstrated intrinsic motivation (Ryan and Deci, 2000), where they were 'pursuing an interest in a specific subject, enjoyment of a topic or intellectual stimulation' (Jenkins, 2018, p. 245) and edited participant quotations are shown in Table 7.24.

Table 7.24 Positive attitude to marketing education by participants, highlighting generational cohort

POSITIVE ATTITUDE TO MARKETING EDUCATION	**CASE**	**GENERATIONAL COHORT**	
		Digital native	***Digital immigrant***
I'm aiming to get into uni. I'm also practising to get my BTEC in Digital Marketing.	[CONTENT REDACTED TO PRESERVE ANONYMITY OF PARTICIPANTS]		
The CIM is useful but I wanted to frame digital marketing with a more academic approach, which has helped my career. Undertaking a [digital] Masters was a more about personal goals as I would like to continue developing my research skills.			
Even though I already have a Masters … … I realised I wanted to acquire a CIM Diploma, as it was more academic and provided a theoretical understanding of communications and marketing, rather than just by practising on the job.			

This contrasted with evidence from some of the digital immigrants without formal marketing qualifications, who had taken different approaches. Some had years of industry experience and others had taken shorter day courses, as the edited participant quotations in Table 7.25 demonstrate.

Table 7.25 Mixed attitude to marketing education by participants, highlighting generational cohort

ATTITUDE TO MARKETING EDUCATION	**CASE**	**GENERATIONAL COHORT**	
		Digital native	***Digital immigrant***
I just fell into marketing and I have no marketing qualifications … I think there is a real limit to what the CIM for example can deliver on a day. I have done some Google Analytics day courses, for example but no real sort of long-term training.	[CONTENT REDACTED TO PRESERVE ANONYMITY OF PARTICIPANTS]		
Everything that I have done with social media I have been self-taught ... And I did the Google AdWords … course.. and I did a digital marketing and a social media marketing short course … which is just like an online thing where you get a diploma.			
I do occasionally attend marketing courses … I know I could do a lot more.			
I did a course on Facebook and Google analytics and I did SEO, but all of the paid advertising is a bit of a mystery.			

The digital immigrants lacking formal marketing qualifications, shown in Table 7.25, illustrated that unaccredited day courses were the selected option, although neither extrinsic nor intrinsic motivation was present in these digital immigrants.

Other attitudes to marketing education involved learning through activity (Dewey, 1916a; Garrison, Neubert and Reich, 2012), although as shown in [CONTENT REDACTED TO PRESERVE ANONYMITY OF PARTICIPANTS] this could be a lack of motivation as there was no requirement to gain a digital marketing qualification [CONTENT REDACTED TO PRESERVE ANONYMITY OF PARTICIPANTS]. In other cases some digital immigrants without formal marketing qualifications, recognised the benefit of a marketing education within their organisation and instead of studying, employed staff with the qualifications or learned from colleagues [CONTENT REDACTED TO PRESERVE ANONYMITY OF PARTICIPANTS] .

Therefore a positive attitude to formal marketing qualifications was more prevalent in digital natives, who were intrinsically motivated. Digital immigrants found ways around the lack of formal marketing qualifications, through hiring more qualified staff or attending day courses.

7.5.4 Emerging theme 4: Digital differences - Concern using social media

The final theme which emerged, was amongst digital immigrants without formal marketing qualifications, who expressed concern using social media. Table 7.26 shows examples expressed by participants at a personal level.

Table 7.26 Concern using social media expressed by participants at a personal level, highlighting generational cohort and presence or absence of formal marketing qualifications

TECHNOLOGY USED	CASE	GENERATIONAL COHORT		FORMAL MARKETING QUALIFICATIONS	
		Digital native	***Digital immigrant***	***Present***	***Absent***
I think you have to be careful [using social media].	[CONTENT REDACTED TO PRESERVE ANONYMITY OF PARTICIPANTS]				
Social media can be dangerous if you allow that					
[I] quickly understood how important and powerful the channels were and that you had to be careful what you said					

The critical incidents identified earlier in this chapter served as warnings for the negative impact of social media. [CONTENT REDACTED TO PRESERVE ANONYMITY OF PARTICIPANTS] had experienced issues first-hand which concerned an unhappy customer and consequently avoided the use of social media as a customer service channel or a facility to gain online reviews and [CONTENT REDACTED TO PRESERVE ANONYMITY OF PARTICIPANTS] had witnessed negative online issues, leading to concern.

7.6 Chapter conclusions

This chapter has presented the findings from the Research Phase Two, which sought to address Research Question 11: ‘What are the significant differences?’. These were centred around generational cohorts (digital immigrants and digital natives) and the presence or absence of formal marketing qualifications.

Having built on the findings in Chapter Six, this chapter began by exploring the *a priori* themes based on the knowledge from a range of participants working in organisations across different sectors. The participants knowledge was gained from semi-structured interviews. The transcript data was added to the content analysis software QSR NVivo 12 (QSR International Pty Ltd, 2018), and from this, following a pragmatist epistemology, the experiences presented by the participants involved interpretation. To illustrate the evidence within the context of the organisations, some participant dialogue was included and a characteristic of mixed methods research is to provide content visually, in order to highlight important information (Collins, Onwuegbuzie and Jiao, 2006; Lurie and Mason, 2007; Tashakkori and Teddlie, 2010).

From the analysis, the main findings confirmed or rejected the *a priori* themes and Table 7.27 which is adapted from Table 7.4 at the start of this chapter, shows where evidence was found, and was not found, to support the *a priori* themes.

Table 7.27 Main theme and sub-themes of enquiry in Research Phase Two which were evidenced by participants within their organisations

MAIN THEME	SUB-THEMES	EVIDENCE IN RESEARCH PHASE TWO
Affordances	To entertain customers	Yes
	To provide offers	Yes
	To interact with customers	Yes
	To gain reviews	Yes
	To deliver customer service	Yes
	For new product development	No
	For customer segmentation	Yes

MAIN THEME	SUB-THEMES	EVIDENCE IN RESEARCH PHASE TWO
	For brand management	Yes
Social media strategy	Measure Resources Strategy	Yes No Yes
Critical Incident	The place The persons The conditions The activities	Yes although there were no common factors

Adapted from Table 7.4 Main theme and sub-themes of enquiry in Research Phase Two

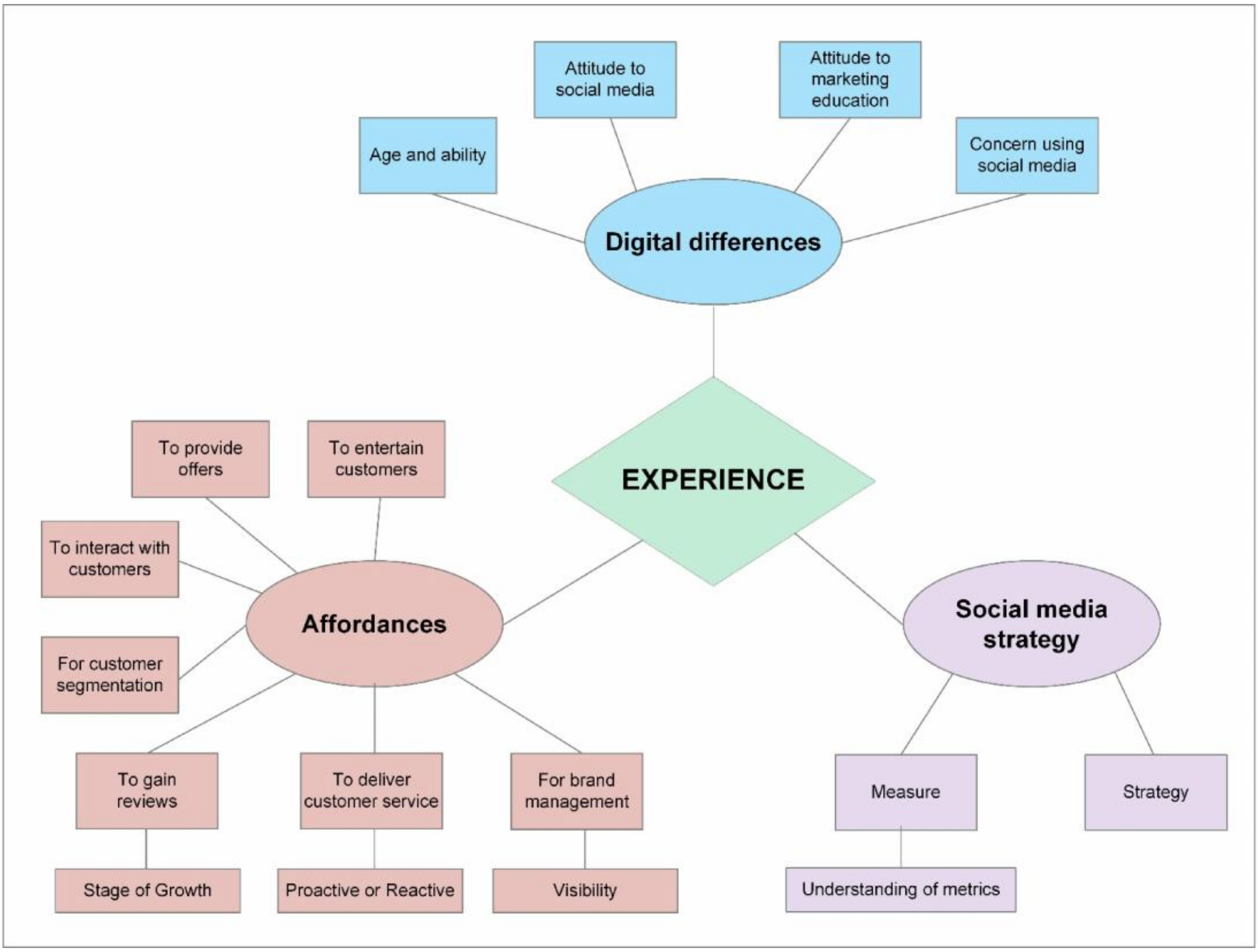
Therefore two areas were removed as lacking evidence in Research Phase Two: new product development and resources. Neither were fully supported in the semi-structured interviews as being an affordance or critical factor in social media marketing in organisations.

Additionally, whilst the critical incident technique served to identify supplementary evidence from the participants in Research Phase Two, it did not augment or enhance the critical factors in social media management. However, this questioning method confirmed the need for a social media strategy.

As well as removing factors that were not deemed critical for organisations from the thematic map, four emerging themes were identified: (i) age and ability; (ii) attitude to social media; (iii) attitude to marketing education; and (iv) concern using social media. Whilst these themes emerged as areas to consider, they are idiographic characteristics (Cornelissen, 2002; Gonzalo-Castr *et al.*, 2010), rather than organisational factors, however, they provide a helpful frame within which to situate the required application of social media marketing within organisations.

One of the contributions of this chapter is the recognition of critical factors in social media marketing application and the development of affordances. As stated earlier, the affordances were identified as *a priori* themes and illustrated in the refined thematic map (see Figure 5.10). The revisions are displayed in Figure 7.20, which provides a revised thematic map, after the conclusion of Research Phase Two.

Figure 7.20 Thematic map (version 4) revised after the conclusion of Research Phase Two



Thus Research Phase Two illustrated that critical success factors within organisations in their social media marketing – based on evidence from participants working in these organisations – comprise two areas:

- ***Affordances***: (i) entertaining customers; (ii) providing offers; (iii) customer interaction; (iv) gaining reviews; (v) delivering customer service; (vi) customer segmentation; and (vii) brand management.
- ***Social media strategy:*** (viii) measuring social media; and (ix) adoption and development of strategy.

Social media affordance (i) entertaining customers, was evidenced by several participants bringing fun into the path to purchase process, regardless of the organisation sector. Entertaining customers was considered acceptable, even when organisations sometimes required a formal tone.

The social media affordance within the sales cycle (ii) providing offers, varied according to the organisation and illustrated different interpretations of the concept of an offer – from a discount to a web-link, or sharing third-party offers to charitable donations. One factor recognised by some participants was the intended target audience as one mentioned existing customer benefits and another described new customer acquisition.

Social media affordance (iii) customer interaction has moved from a monologue to a polylogue enabling organisations to share information and best practice with customers and stakeholders (Argyris and Monu, 2015). Recognising its importance, in one example, the participant's organisation had incorporated interaction into their key performance indicators (KPIs).

The social media affordance within the sales cycle (iv) gaining reviews, is essential for organisations. Participants felt that it was important to establish their credibility online and to demonstrate their skills and success. The use of automated provider-driven systems appears to be growing, benefitting organisations with both the process automation and the removal of 'choice anxiety' [CONTENT REDACTED TO PRESERVE ANONYMITY OF PARTICIPANTS], where customers lack clarity as to which review system to use. There is the challenge of obtaining positive feedback, due to the time this takes, as well as the presence of a standard operating procedure, to ensure reviews are sought. Furthermore, other participants were sceptical and concerned about the notion of petitioning for reviews as it represented too great a risk to the organisation's reputation or lacked the transparency required resulting in a 'murky' system.

Social media affordance (v) delivering customer service, is becoming ‘business as usual’ for customers and ‘has huge potential in customer service and can support the development of long-term relationships’ (Canhoto and Clark, 2013, p. 539). Yet one participant’s organisation was astonished at the growth of enquiries emanating from social media and was struggling to deliver the service across multiple platforms. Other participants were less surprised and commented that they had embedded enquiries from social media into their operating systems, adopting a trans-platform customer-service approach.

Recognised as a critical managerial activity (Quinn and Dibb, 2010), the social media affordance (vi) customer segmentation, was not yet fully developed amongst the participants. Thus this is considered to be at an early stage of maturity as those participants who perceived that they were segmenting their customers, were at stage 1 ‘Identification of characteristics that explain differences in behaviour’, none had progressed to stage 2 - evaluating segment attractiveness or stage 3 - positioning the company’s offer (Quinn and Dibb, 2010, p. 416).

Social media affordance (vii) online brand management for organisations, is acknowledged in the extant literature as being important (Gensler *et al.*, 2013). Several participants noted the power and scalability of social media which enabled organisational profiles to be raised. One specific element of brand awareness that generated greater emotion was the *need* to be visible online. One participant remarked that without an online presence, the organisation did not exist, with another suggesting that an organisation without a social media presence was a negative indicator.

Critical factor (viii) measuring social media, has been acknowledged as 'a challenge to organisations' (Valos *et al.*, 2015, p. 7), and in this study it produced two opposing groups of responses. The first were unable to move beyond vanity metrics, which largely remained a hurdle for digital immigrants and those without formal marketing qualifications. The only digital native in this group [CONTENT REDACTED TO PRESERVE ANONYMITY OF PARTICIPANTS] also had a lack of formal marketing qualifications and was aware of what was required, but worked with an older board who required simplified data. The other group who measured the different metrics within social media to some depth, mainly comprised those with formal marketing qualifications, regardless of generation. The exception was [CONTENT REDACTED TO PRESERVE ANONYMITY OF PARTICIPANTS] who had technical skills, having originally studied web design and coding.

Critical factor (ix) adoption and development of strategy, is not yet a habit and very much a work in progress, with most participants. This reflected the academic literature as this is a less covered domain (Keegan and Rowley, 2017).

Thus having explored the affordances and critical factors, the next section will summarise the digital differences.

7.6.1 Digital differences

The digital differences which emerged from Research Phase Two as discussed in this chapter, which were added to the revised thematic map (see Figure 7.20) concerned: (i) age and ability; (ii) attitude to social media; (iii) attitude to marketing education; and (iv) concern using social media, each of these are deliberated in this section.

Digital difference (i) age and ability, was not identified in the earlier refined thematic map. This emerged from the qualitative semi-structured interview data and demonstrated a lack of confidence in the use of social media by digital immigrants, especially those without formal marketing qualifications. This group diminished their own abilities, although this may be due to a lack of confidence. It was interesting to learn that Facebook is perceived, at least by one digital immigrant, as ‘the old people’s social network’!

Digital difference (ii) attitude to social media, was enlightening as the literature often considers consumers’ attitudes to social media rather than the attitudes of those employed in this area. However, in spite of the challenges that social media brings for organisations and negative perceptions harboured by three participants, real passion and enthusiasm was demonstrated by a further three participants. The six participants exhibiting strong attitudes to social media were digital immigrants who have witnessed the evolution of social media and felt the initial excitement and subsequent disappointment in some cases.

Digital difference (iii) attitude to marketing education, was markedly different between the generational cohorts. Whilst the concept of digital literacy is often related to education and learning, the digital natives were intrinsically motivated to augment their skill set. Some of the digital immigrants circumvented the issue by employing staff with relevant qualifications.

Digital difference (iv) concern using social media, is found in the extant literature as the confident use of technology and the ability to manage digital marketing is a core construct within the European Commission’s Digital Competence framework (European Commission Directorate-General for Education and Culture, 2012; Stone, 2014; Curtarelli *et al.*, 2016). However, concern using social media emanated from digital immigrants without formal marketing qualifications.

Considering the findings within these themes as well as other interpretations in this chapter, four types of social media manager have been identified, as shown in Table 7.28, with characteristics evidenced from the data and example participant quotations.

Table 7.28 Types of social media marketing managers, based on generational cohort and presence or absence of formal marketing qualifications, with characteristics and example participant quotations

<table>
<tr><th>TYPE OF SOCIAL MEDIA MARKETING MANAGER</th><th>CHARACTERISTICS</th><th>EXAMPLE PARTICIPANT QUOTATIONS</th></tr>
<tr><td>Digital native with formal marketing qualifications</td><td>- Demonstrated competent use of social media technology and tools to the extent where they combine different systems
- Ability to adapt typical social media usage for their organisations’ purposes</td><td rowspan="3">[CONTENT REDACTED TO PRESERVE ANONYMITY OF PARTICIPANTS]</td></tr>
<tr><td>Digital immigrant with formal marketing qualifications</td><td>- Assigned others to use social media
- Proactively seeking brand awareness through social media, in particular having the need to be visible online</td></tr>
<tr><td>Digital native without formal marketing qualifications</td><td>- Seek help when needed to use social media technology and tools
- Keen to explore different formats of social media content
- Lack of understanding of social media measurement with a focus on vanity metrics</td></tr>
</table>

TYPE OF SOCIAL MEDIA MARKETING MANAGER	CHARACTERISTICS	EXAMPLE PARTICIPANT QUOTATIONS
Digital immigrant without formal marketing qualifications	- Lack confidence in ability to use social media - Lack of confidence or understanding using social media technology and tools - Concerned about social media and recognise the need to be visible online - Lack of understanding of social media measurement with a focus on vanity metrics	

Therefore a contribution of this chapter has been to address the question: ‘What are the significant differences in social media marketing application?’ and has further identified four types of social media managers, which follows a pragmatist epistemology of providing utility at its core, as these types of social media managers will be further refined in the next chapter, to offer additional solutions for business.

The next section will reflect on the Stages of Growth as applied to the social media affordances defined earlier in this study.

7.6.2 Social Media Affordances Maturity Scale

The participants in Research Phase Two, responded on behalf of their organisations and demonstrated that they were at different stages of application of the social media affordances. Some social media affordances were embraced and others were actively avoided. Table 7.29 shows a summary of all affordances and the responses from participants. The cells with the highest number of responses are highlighted.

Table 7.29 Affordances and responses from participants in Research Phase Two, concerning their organisation

AFFORDANCES	NO	MIXED	YES
To entertain customers	9	6	11
To provide offers	13	7	6
To interact with customers	3		23
To gain reviews	8		18
To deliver customer service	5		21
For new product development	22		4
For customer segmentation	14		12
For brand management	1		25

Thus the participants gained affordances from social media for: (i) entertaining customers; (ii) providing offers; (iii) customer interaction; (iv) gaining reviews; (v) delivering customer service; (vi) customer segmentation; and (vii) brand management.

Further analysis was conducted in this chapter where the social media affordances and critical factors were considered within an adapted version of the Social Media Stages of Growth model (Duane and O’Reilly, 2016). This chapter has extended this model to incorporate an additional stage, Level 0, where no activity is present. Additionally, this chapter has expanded the original concept, to more closely fit the needs of social media affordances as a maturity scale.

Thus, to connect the Stages of Growth model (Duane and O’Reilly, 2016), and the affordances identified in this study, these have been refined and consequently Table 7.30 provides a Social Media Affordances Maturity Scale which, within a pragmatist epistemology, ‘makes a difference to organisational practice’ (Saunders *et al.*, 2016, p. 148), thus enabling organisations to identify their current level, as well as the action required to move to the next level.

Table 7.30 Social Media Affordances Maturity Scale

ELEMENT		AFFORDANCES MATURITY LEVEL					
		0. No activity, application avoided	**1. Attempted application, no process in place**	**2. Ad hoc and inconsistent application**	**3. Basic application**	**4. Standardised and proactive application**	**5. Integrated and agile application**
Affordance	**To entertain customers**	Avoid use of entertainment online	No process in place, trial and error	Occasional use of entertainment, seasonal or event-based	Limited use of entertainment on a manual basis	Proactive use of entertainment and understand customers' humour	Creative use of entertainment and staff empowered to contribute
	To provide offers	No use of offers online	No process in place, trial and error	Adding offers on ad hoc basis	Limited promotion, or sharing offers from other organisations	Proactive promotion of offers	Integrated and automated application
	To interact with customers	Avoid use of interaction online	No process in place, trial and error	Watching but not fully interacting	Reactive interaction	Proactive interaction with process in place	Integrated application with formal reporting
	To gain reviews	No intention to seek reviews via social media	No process in place, trial and error	Inconsistent approach	Reactive approach	Proactive approach with process in place	Integrated and automated application
	To deliver customer service	No customer service issues addressed online	No process in place, trial and error	Ad hoc customer service management	Reactive management of customer service	Proactive management of customer service	Integrated and automated application
	For customer segmentation	No application of customer segmentation online	No process in place, trial and error	Ad hoc approach to customer segmentation	Reactive approach to customer segmentation	Proactive approach to customer segmentation	Integrated and automated application
	For brand management	No application of brand management online	No process in place, trial and error	Brand management on limited basis	Reactive approach to brand management online	Proactive approach to brand management online and aware of brand constructs	Integrated application with empowered staff

ELEMENT		AFFORDANCES MATURITY LEVEL					
		0. No activity, application avoided	**1. Attempted application, no process in place**	**2. Ad hoc and inconsistent application**	**3. Basic application**	**4. Standardised and proactive application**	**5. Integrated and agile application**
Social media strategy	**Measurement**	No metrics considered	Some attempt to measure vanity metrics	Inconsistent measurement of vanity metrics	Metrics are captured, lacks formal process	Metrics are captured, understood and presented to others	Metrics are captured, understood and presented to management within an automated system
	Strategy	No strategy in place	Some attempt to develop a strategy or tactics in place	Strategy being developed	Basic strategy with limited planning and reporting	Formal strategy in place	Integrated strategy throughout the organisation

Therefore this chapter has presented the findings from Research Phase Two. The participants' profiles were illustrated to demonstrate the wide sources of knowledge, from different job roles, varying locations and diverse sectors, to address Research Question 12, 'Why do the significant differences exist?'.

Following the process of thematic analysis, the main themes were identified and discussed. This chapter ascertained the significant differences in social media marketing application based on generational cohort and the presence or absence of formal marketing qualifications. Four types of social media marketing managers, based on these factors, with characteristics and example participant quotations, have been classified.

Additionally a Social Media Affordances Maturity Scale has been proposed, based on the findings in Research Phase Two, which enables organisations to identify the action required to move to the next level of maturity.

Thus this chapter has further demonstrated that social media is the facilitation of interactive, connected, marketing purposes at organisational, peer-to-peer and personal levels, as proposed in Chapter Two. The next chapter will discuss the findings and consider the implications for the application of the social media affordances for organisations.

PART 4: DISCUSSION AND CONCLUSIONS

Chapter Eight: Discussion

8.1 Chapter introduction

This chapter connects the research findings with the current literature to explicate the evidence gathered and illuminate the contribution of this research in the wider marketing literature. This discussion will be presented based in the order of the research questions.

As pragmatism adopts a teleogical perspective, seeing the purpose in the result, rather than its causes, it was an appropriate ontology and epistemology to investigate social media marketing within organisations to identify critical success factors and develop a framework for social media application in organisations, which is presented later in this chapter. Therefore this chapter will present a summary of findings and 'practical bearings' from this study, which are in line with a pragmatist epistemology and ontology (Peirce, 1878, Lecture II; 1905, p. 171).

The approach espoused in this chapter fulfils step six in the Good Reporting of A Mixed Methods Study (GRAMMS) guidelines (O'Cathain, Murphy and Nicholl, 2008), which is to 'Describe any insights gained from mixing or integrating methods' (p. 97), and a partial triangulation protocol approach is used (Schifferdecker and Reed, 2009; O'Cathain *et al.*, 2014; O'Cathain, 2017b), to discuss where findings converged, complemented, disagreed or appeared from the quantitative method to the qualitative method, to explain why there is different application of social media marketing within organisations. Hence this will explicate which affordances were supported in the empirical research and which were not. The Social Media Affordances Maturity Scale will be applied and the working typologies for social media managers, presented in Chapter Seven, will be discussed.

Additionally, to meet the original Research Aim: ‘To investigate social media marketing within organisations in order to identify critical success factors and develop a framework for social media application in organisations’, this chapter will provide frameworks for organisations, which will include:

- Stages towards the identification of critical factors in social media application
- Decision tree to identify focus areas of social media application and critical factors for different classifications of social media managers
- Strategic framework for social media application in organisations.

8.1.1 Summary of findings and practical bearings from this study

A key tenet of a pragmatist philosophy is that knowledge brings ‘practical bearings’ (Peirce, 1878, Lecture II; 1905, p. 171), thus the utility or contribution, based on the evidence in this study, is summarised within Table 8.1, which illustrates the research questions, the findings and in which chapter the detailed findings are located.

Table 8.1 Summary of findings and practical bearings from this study

RESEARCH QUESTION	CHAPTER	SUMMARY OF FINDINGS	PRACTICAL BEARING / CONTRIBUTION
1. What is social media?	Two	Lack of an agreed definition of social media. A syntactic synthesis of the top frequently mentioned terms incorporates: the subject as actor, the verb facilitate, and objects including content and interactivity.	A working definition has been constructed for further investigation: Social media is the facilitation of interactive, connected, marketing purposes at organisational, peer-to-peer and personal levels.
2. Why do individuals use social media?	Two	Identification of critical factors in the user purpose of social media: social interaction; entertainment; information; personal identity; communication; community development; relaxation; convenience; remuneration; and surveillance.	Assemblage of the critical factors in the user purpose of social media which can better frame future research.
3. Are there different types of social media users?	Two	Three types of social media users: (i) consuming; (ii) participating; and (iii) producing. However, the research did not consider the awareness, attitude or ability of those using social media.	Identification of types of social media users.
4. Are there differences in social media usage based on generational cohorts?	Two	No consistent evidence as different variables used in sample frames.	This was a gap in the extant research.
5. How can organisations use social media?	Three	Application includes: market and product research, new product development, customer segmentation, brand building, brand management, sales cycle, customer service, and recordability.	Assemblage of critical factors for the application of social media for organisations.

RESEARCH QUESTION	CHAPTER	SUMMARY OF FINDINGS	PRACTICAL BEARING / CONTRIBUTION
6. What supplementary opportunities do social media offer organisations?	Three	Identification of affordances of social media for organisations: brand management, communication, community development, customer segmentation, customer service, interaction, entertainment, information, market and product research, monitorability / surveillance, new product development, remuneration (offers), and sales cycle (testimonies and reviews).	Synthesis of the core attributes of affordances: (i) The agency and user's actions, (ii) The objects and its features or materiality, (iii) The context or features of the environment, space, niche, and (iv) The relationship between agency, objects and the context resulting in interaction. Extended the criteria for affordances (Evans et al., 2017), to have greater relevance to an organisation context. Development of social media affordances for organisations.
7. What are the critical factors in social media usage for organisations?	Seven	Confirmation of the critical factors in social media application for organisations: *Affordances*: (i) entertaining customers; (ii) providing offers; (iii) customer interaction; (iv) gaining reviews; (v) delivering customer service; (vi) customer segmentation; and (vii) brand management. *Social media strategy*: (viii) measuring social media; and (ix) adoption and development of strategy.	Warranted assertion of social media affordances for organisations.
8. Are there guidelines for the application of social media within organisations?	Three	Varying guidelines which resulted in the strategic social media elements: vision, research, resources, customer focus, integration, manage, measure, and income. However, these guidelines largely failed to address the issue of organisational maturity and application of social media.	This was a gap in the extant research surrounding organisational maturity and the application of social media.

RESEARCH QUESTION	CHAPTER	SUMMARY OF FINDINGS	PRACTICAL BEARING / CONTRIBUTION
9. Are there differences in social media marketing application based on generational cohort? *11. What are the significant differences?	Six	Digital natives more likely to: • Have formal marketing qualifications • Use social media for entertainment • Use social media for customer service • Manage social media interaction • Measure results from social media • Use social media for reviews • Measure the value of social media • Have internal staff managing social media.	Understanding of differences in social media application based on generational cohort.
10. Are there differences in social media marketing application based on formal marketing qualifications? *11. What are the significant differences?	Six	Those with formal marketing qualifications, more likely to: • Use social media for entertainment • Use social media for customer service • Manage social media interaction • Measure results from social media • Use social media for interaction • Integrate social media communication • Use social media for brand recognition • Have clear strategy and vision for social media management • Allocate extra resources for social media.	Understanding of differences in social media application based on the presence or absence of formal marketing qualifications.
12. Why do the significant differences exist?	Seven	Due to (i) age and ability; (ii) attitude to social media; (iii) attitude to marketing education; and (iv) concern using social media.	• Four groups of people working in marketing with responsibility for social media were identified and presented as working typologies: digital directors, digital tourists, digital drivers and digital explorers. • Development of a Social Media Affordances Maturity Scale.
13. What are the guidelines for best application of in social media marketing in organisations?	Eight	Stages towards the identification of critical factors in social media application which resulted in guidelines for best application of social media marketing in organisations.	• Decision tree to identify focus areas of social media application and critical factors for different classifications of social media managers. • Strategic framework for social media application in organisations.

8.2 Scholarly Review: Findings

The Research Aim was: ‘To investigate social media marketing within organisations in order to identify critical success factors and develop a framework for social media application in organisations’, and this commenced with Research Objective 1: ‘To review the literature on social media and social media application in organisations in order to identify critical success factors’. This created eight research questions which are discussed in the next section.

8.2.1 What is social media?

The study commenced with Research Question 1: ‘What is social media?’ to better understand the landscape and the essence of social media. The literature review in Chapter Two, found a lack of an agreed definition of social media. Thus, due to the absence of definitional consensus, various descriptions are employed (Tsimonis and Dimitriadis, 2014), and twenty definitions of social media were identified and content analysis performed using QSR NVivo (QSR International Pty Ltd, 2018). Thus the terms were synthesised into similar groups.

There were issues with extant definitions (i) confusion concerning the technical operations of social media platforms, as both Twitter and Facebook have facilitated platform usage for analogue telephony, to circumvent the lack of internet access (Eltantawy and Wiest, 2011; Russell, 2011; Chamlertwat and Bhattarakosol, 2012; Facebook, 2015; Twitter, 2015); (ii) some definitions were binary, suggesting dyadic processes between users and organisations or systems (Waters *et al.*, 2009; Hogan and Quan-Haase, 2010; Kent, 2010; Järvinen *et al.*, 2012; Peters *et al.*, 2013), ignoring the peer-to-peer or polylogue conversations taking place; and (iii) other definitions failed to address lurkers (Mathwick, 2002), who neither add nor create content (Kietzmann *et al.*, 2011; Charlesworth, 2014; Carr and Hayes, 2015; Gupta and Davin, 2015).

However, definitions and discussions pertaining to descriptions are commonplace in several disciplines within the domain of marketing, for example; advertising (Richards and Curran, 2002), brand (Stern, 2006), integrated marketing communications (Kliatchko, 2009), and macromarketing (Bartels and Jenkins, 1977). Accordingly, the term *marketing* has been officially delineated by practitioner institutes (American Marketing Association, 2013; Chartered Institute of Marketing, 2015), to such an extent that the American Marketing Association periodically reviews its formal definition, as adjustment may be required as a field alters with time and application (Richards and Curran, 2002).

The conceptual problem and benefits of defining a term has been recognised (MacKenzie, 2003; MacInnis, 2011), although MacInnis (2011), argued that conceptualisation, once identified, requires explication through description. Classification of terms is considered useful as it 'represents the "essence" of an idea, containing its key concepts and critical abstractions' (Harker, 1999, p. 13). This study found that the lack of clarity with an agreed definition in this domain was an issue that was recognised in extant literature (Kane *et al.*, 2014), and was confirmed by two participants in Research Phase Two who were unsure as to whether YouTube was a social media channel, thus indicating confusion in practice as well as academia. As recommended by MacKenzie (2003, p. 323), once alternative conceptualisations of the 'focal construct found in the research literature' have been provided, a synthesised version should be created and thus to open the debate and generate further discussion, an alternative operational definition was offered - Social media is the facilitation of interactive, connected, marketing purposes at organisational, peer-to-peer and personal levels – which is based on a synthesis of the extant literature as well as usage, which according to Bartels and Jenkins (1977), is often how definitions are developed.

Within a pragmatist epistemology (Dewey, 1908), usefulness and clarity are helpful in resolving issues and thus further work is required to achieve definitional consensus.

8.2.2 Why do individuals use social media?

Research Question 2, in Chapter Two, sought to understand: 'Why do individuals use social media?', as this aspect of the research was to gain an understanding of the landscape in context, the rationale for individuals using social media was explored. Thus factors for uses and gratifications of social media by individuals, were identified as social interaction; entertainment; information; personal identity; communication; community development; relaxation; convenience; remuneration; and surveillance. These factors were compared to the usage of social media by organisations and accordingly informed the development of Research Phase One.

The extant research demonstrated greater consideration of individual usage of social media, than organisational use. It is postulated that this is due to more straightforward access, as several of the articles reviewed gained access to participants via social media or brand related websites, as was illustrated in Table 2.2.

Thus a contribution of this chapter was an assemblage of the critical factors in the user purpose of social media.

8.2.3 Are there different types of social media users?

Research Question 3, in Chapter Two, pondered: 'Are there different types of social media users?'. Having understood why individuals used social media, the types of users were explored, within the context of a pragmatist epistemology, to better inform organisations.

Thus the literature review confirmed that there were three types of social media users: (i) consuming; (ii) participating; and (iii) producing. Furthermore, these different types of social media users were based on: (i) group involvement; (ii) relationship orientation; (iii) contribution / content; (iv) usage frequency; (v) usage variety; and (vi) behaviour.

Therefore another finding in this section was the evolution of emphasis within the investigations, from group involvement, which was considered as a key factor in earlier research (Kozinets, 1999; Mathwick, 2002), to the duration spent by individuals, in both contributing to, and using the social media websites, which was observed in later works (Brandtzæg, 2010; Li and Bernoff, 2011; Kilian, Hennigs and Langner, 2012; Lorenzo-Romero, Alarcon-del-Amo and Constantinides, 2012). However, there was no evidence as to why this change had occurred, although Brandtzæg (2010, p. 949), suggested that this may be due to a 'trend towards more fragmented or differentiated usage among new media users and a greater sensitivity on the part of the researchers to different usage types'. This may additionally be explicated as between the initial research into online groups towards the turn of the century (Kozinets, 1999; Mathwick, 2002), which surrounded the first era of digital, social media and mobile marketing, as defined by Lamberton and Stephen (2016). Investigations over a decade later, witnessed significant technological changes - quotidian internet access and the rise of social media – as the second and third eras saw social media become omnipresent, enabled by greater enhancement of the platforms, hence the progression of research.

8.2.4 Are there differences in social media usage based on generational cohorts?

Research Question 4, in Chapter Two, asked: 'Are there differences in social media usage based on generational cohorts?', yet the literature review did not yield conclusive outcomes. This was partly as there was a lack of consistent evidence, since different variables were used in the sample frames, although in some cases, there was reference to digital natives and digital immigrants. Whilst extant research did not address this question, where investigations had considered generational groups, one omission concerned the skills of the users. This demonstrated that the typologies focused on frequency and type of usage (see for example: Muntinga, Moorman and Smit, 2011; Whiting and Williams, 2013; Luchman, Bergstrom and Krulikowski, 2014), rather than ability. Thus this question was further explored in the empirical research.

8.2.5 How can organisations use social media?

Research Question 5, in Chapter Three, sought to understand: ‘How can organisations use social media?’, and as pragmatism seeks to find solutions to difficulties, which is, according to Hackley (2013, p. 117), the essence of marketing that ‘helps solve consumer problems’. Thus this investigation moved from individuals to organisations, to understand the affordances of social media within an organisational setting. This was to address the research aim and identify critical success factors, to deliver a practical bearing (Peirce, 1905; Scott and Briggs, 2009), in the form of a utility framework for social media application in organisations.

This section found eight critical factors from social media for organisations: (i) market and product research (Weinberg *et al.*, 2013; Rolland and Parmentier, 2014); (ii) new product development (Rathore, Ilavarasan and Dwivedi, 2016); (iii) customer segmentation (Canhoto, Clark and Fennemore, 2013); (iv) brand building (Wattanacharoensil and Schuckert, 2015); (v) brand management (Gensler *et al.*, 2013); (vi) sales cycle (Saboo, Kumar and Ramani, 2016); (vii) customer service (Canhoto and Clark, 2013); and (viii) recordability (Argyris and Monu, 2015). Whilst these affordances may seem quotidian in terms of application within organisations, the contribution of this section was the assemblage of these critical factors for organisations which will additionally be useful for future research into organisations.

Once again, within a pragmatist and mixed-methods approach, this section contributed to inform the subsequent empirical research, which tested these critical factors by gathering evidence to understand their presence or absence from the respondents in Research Phase One and the participants in Research Phase Two.

8.2.6 What supplementary opportunities do social media offer organisations?

Research Question 6, in Chapter Three, examined: ‘What supplementary opportunities do social media offer organisations?’, and this was considered using the lens of affordances theory. As the literature review explicated, this theory seeks utility and action and was thus a good fit with a pragmatist epistemology and ontology.

The chapter included discussion of the application of affordances theory in the domain of marketing and social media, to synthesise the core attributes of affordances, classified as: (i) The agency and user’s actions, (ii) The objects and its features or materiality, (iii) The context or features of the environment, space, niche, and (iv) The relationship between agency, objects and the context resulting in interaction. It was found that scholars have considered affordances theory in different ways – mainly adopting Gibson’s framework (1986), the properties of the environment and its action potential – or as described on two levels by Bucher and Helmond (2018), as high-level affordances, whereas others extracted the functional features of technology to embrace a low-level version of affordances, focused on enabling simple tactical actions. Within the domain of social media there were two studies that concerned organisations, although their subject was knowledge-sharing, rather than marketing (Majchrzak *et al.*, 2013; Treem and Leonardi, 2013), thus confirming a gap in the literature for the application of affordances theory to social media marketing in organisations.

Building on the eight critical factors from social media for organisations found in the previous section, and supported by the critical factors for social media use by individuals identified earlier in the literature review, this part of the study subsequently appraised the critical factors using affordances theory. The assessment resulted in the identification of thirteen affordances of social media for organisations, as shown in Table 8.2.

Table 8.2 Social media affordances, showing sources identified in extant literature

SOCIAL MEDIA AFFORDANCES	SOURCES WHERE IDENTIFIED IN EXTANT RESEARCH
1. Brand management	Muntinga, Moorman and Smit, 2011; Gensler *et al.*, 2013; Pletikosa-Cvijikj and Michahelles, 2013; Argyris and Monu, 2015; Wattanacharoensil and Schuckert, 2015; Hamilton, Kaltcheva and Rohm, 2016b
2. Communication	Whiting and Williams, 2013; Luchman, Bergstrom and Krulikowski, 2014; Vuori and Jussila, 2016
3. Community development	Kozinets, 1999; Watts, Dodds and Newman, 2002; boyd and Ellison, 2007; Baird and Parasnis, 2011; Vuori and Jussila, 2016
4. Customer segmentation	Canhoto, Clark and Fennemore, 2013
5. Customer service	Baird and Parasnis, 2011; Muntinga, Moorman and Smit, 2011; Canhoto and Clark, 2013; Hamilton, Kaltcheva and Rohm, 2016b
6. Engagement (social interaction)	Shao, 2009; Baird and Parasnis, 2011; Muntinga, Moorman and Smit, 2011; Whiting and Williams, 2013; Luchman, Bergstrom and Krulikowski, 2014; Argyris and Monu, 2015; Krishen *et al.*, 2016
7. Entertainment	Shao, 2009; Muntinga, Moorman and Smit, 2011; Whiting and Williams, 2013; Luchman, Bergstrom and Krulikowski, 2014; Hamilton, Kaltcheva and Rohm, 2016b
8. Information	Shao, 2009; Baird and Parasnis, 2011; Muntinga, Moorman and Smit, 2011; Whiting and Williams, 2013; Luchman, Bergstrom and Krulikowski, 2014; Argyris and Monu, 2015; Hamilton, Kaltcheva and Rohm, 2016a
9. Market and product research	Baird and Parasnis, 2011; Weinberg *et al.*, 2013; Rolland and Parmentier, 2014
10. Monitorability / surveillance	Whiting and Williams, 2013; Argyris and Monu, 2015
11. New product development	Baird and Parasnis, 2011; Rathore, Ilavarasan and Dwivedi, 2016
12. Remuneration (offers)	Muntinga, Moorman and Smit, 2011
13. Sales cycle (testimonies and reviews)	Baird and Parasnis, 2011; Muntinga, Moorman and Smit, 2011; Hamilton, Kaltcheva and Rohm, 2016a; Saboo, Kumar and Ramani, 2016

To develop the thirteen affordances, necessitated a system of evaluation and Evans *et al.* (2017, p. 36), developed a threshold criteria which was employed and extended. Three criteria were suggested (Evans *et al.*, 2017), and a fourth was added, to more closely link to the relevancy for organisations: ‘Criterion 4: Does this apply to organisations? If the response is no, there is no application to an organisation and thus it does not meet the criterion and will fail’. From this, one of the proposed affordances, ‘personal identity / status’ was rejected as a characteristic of individual usage of social media, which in an organisational context was replaced by ‘brand management. Thus this additional criterion has been tested once and requires further investigation.

Thus this section contributed to the body of knowledge surrounding the classification of affordances for social media application within organisations, following a pragmatist epistemology.

8.2.7 What are the critical factors in social media usage for organisations?

Research Question 7, sought to understand: ‘What are the critical factors in social media usage for organisations?’. Whilst earlier in Chapter Three, how organisations could use social media and affordances for social media application within organisations, had been identified, this question remained unresolved. Thus this was subsequently addressed in the empirical research, in Research Phase Two, Chapter Seven.

This provided warranted assertions within a pragmatist epistemology (Kono, 2018), of the critical factors in social media for organisations as being in two groups. Firstly the affordances: (i) entertaining customers; (ii) providing offers; (iii) customer interaction; (iv) gaining reviews; (v) delivering customer service; (vi) customer segmentation; and (vii) brand management. The second critical factor concerned social media strategy and comprised two elements: (viii) measuring social media; and (ix) adoption and development of strategy.

Thus this chapter contributed to the confirmation of nine critical factors in social media for organisations. These have practical outcomes (Scott and Briggs, 2009), and managerial implications, as well as contributing towards future research in the wider domain of marketing management.

8.2.8 Are there guidelines for the application of social media within organisations?

Research Question 8, in Chapter Three, concerned: ‘Are there guidelines for the application of social media within organisations?’. However, the literature review did not provide guidelines for the application of social media within organisations, as most models and frameworks focused on consumers or the management of social media, rather than its application. However, strategic social media guideline elements were identified: vision, research, resources, customer focus, integration, manage, measure, and income. Another factor was that the guidelines reviewed in this section for the adoption of social media had failed to address the issue of organisational maturity and application of social media. Thus guidelines for the application of social media within organisations was a gap in the extant research.

8.3 Empirical Research: Insights from findings

As pragmatism adopts a teleogical perspective, seeing the purpose in the result, rather than its causes, the second research objective was: ‘To conduct primary research in order to determine and evaluate current social media marketing application within organisations’. This did not seeks causes for actions, but solutions in the form of a social media framework. This objective focused on these research questions:

- ***Research Question 9:*** Are there differences in social media marketing application based on generational cohort?
- ***Research Question 10:*** Are there differences in social media marketing application based on formal marketing qualifications?
- ***Research Question 11:*** What are the significant differences?

- ***Research Question 12:*** Why do the significant differences exist?

Following the GRAMMS guidelines (O'Cathain, Murphy and Nicholl, 2008), the findings to address these research questions and to explicate social media marketing application within organisations will be discussed in this section and will illustrate whether the findings: (i) converged; (ii) complemented, explained or illuminated the other method; (iii) showed disagreement between the two study components; and (iv) where a theme was identified in one method but not another. Table 8.3 provides a summary.

Table 8.3 Summary of the two research phases and where findings (i) converged; (ii) complemented, explained or illuminated the other method; (iii) showed disagreement between the two study components; and (iv) where a theme was identified in one method but not another

MAIN THEME	SUB-THEMES	RESEARCH PHASE ONE	RESEARCH PHASE TWO	FINDINGS	EXTANT LITERATURE
Affordances	To entertain customers	Statistical significance was found	Confirmed as an affordance	Converged	Extant literature supports entertainment as a motivational factor for individuals, but did not identify entertainment as an affordance for organisations, this was found in this study.
	To provide offers	Mixed: Statistical significance found in generational cohorts, no significant association between those with / without formal marketing qualifications	Confirmed as an affordance	Converged	Supported in extant literature.
	To interact with customers	Mixed: Statistical significance found between those with / without formal marketing qualifications, no significance in generational cohorts	Confirmed as an affordance	Converged	Supported in extant literature.
	To gain reviews	Mixed: Statistical significance found in generational cohorts, no significant association between those with / without formal marketing qualifications	Confirmed as an affordance	Converged	Supported in extant literature.

MAIN THEME	SUB-THEMES	RESEARCH PHASE ONE	RESEARCH PHASE TWO	FINDINGS	EXTANT LITERATURE
Affordances	To deliver customer service	Statistical significance was found	Confirmed as an affordance	Converged	Supported in extant literature.
	For new product development	94 respondents confirmed application	Not confirmed as an affordance	Complemented, explained or illuminated the other method	Supported in extant literature.
	For customer segmentation	122 respondents confirmed application	Confirmed as an affordance	Complemented, explained or illuminated the other method	Supported in extant literature.
	For brand management	Mixed: Statistical significance was found between those with / without formal marketing qualifications, no significance in generational cohorts	Confirmed as an affordance	Converged	Supported in extant literature.
Social media strategy	Measure	Statistical significance was found	Confirmed as a critical factor	Converged	Supported in extant literature.
	Resources	Mixed significance	Not confirmed as a critical factor	Disagreement between the two study components	Supported in extant literature.
	Strategy	Statistical significance was found	Confirmed as a critical factor	Converged	Supported in extant literature.
Digital differences	Age and ability	Not found	New theme	A theme was identified in one method but not another	Supported in extant literature.
	Attitude to social media	Not found	New theme	A theme was identified in one method but not another	Not found in the literature.
Digital differences	Attitude to marketing education	Not found	New theme	A theme was identified in one method but not another	Not found in the literature.
	Concern using social media	Not found	New theme	A theme was identified in one method but not another	Supported in extant literature.

Thus this section will consider each of the affordances of social media for organisations and illustrate where the findings converged. This will follow the themes described in Chapter Seven, based on Figure 7.20, the thematic map which was subsequently revised after the conclusion of Research Phase Two (version 4). This will illustrate where the themes remain present based on the evidence from the empirical research.

Subsequently, additional sections will illustrate where the findings (ii) complemented, explained or illuminated the other method; (iii) showed disagreement between the two study components; and (iv) where a theme was identified in one method but not another.

8.4 Empirical Research: Findings converged

8.4.1 Main theme 1: Affordances - To entertain customers

Whilst entertainment is recognised as a motivational factor for individuals in using social media (Shao, 2009; Muntinga, Moorman and Smit, 2011; Whiting and Williams, 2013; Hamilton, Kaltcheva and Rohm, 2016b), the literature review did not identify entertainment as a purpose for social media usage within organisations. However, as the extant literature indicated the benefit for individuals, this was included within the affordances to be investigated in Research Phase One and subsequently, entertainment was confirmed as an affordance of social media in both research phases and consequently this finding converged.

The differences in generational cohorts may explain the application of entertainment as an affordance, as Research Phase One, found that digital natives were more likely to use social media to entertain customers, whereas Research Phase Two, found that the usage varied. Thus organisations have understood how individuals are using social media and subsequently applied elements within their social media marketing mix. Furthermore, there were subtle variations such as understanding customers' emotions and the intertextual use of parody (Boxman-Shabtai, 2018). Whilst the use of parody by consumers has increased (Schroeder, 2017), further research into the use of parody by organisations is required as 'negative effects on attitudes and behaviors toward the parodied sponsoring brands' (Sabri, 2018, p. 533), have been identified, which may have managerial implications for organisations.

The participants provided examples at all levels within the Social Media Affordances Maturity Scale, from those who avoided entertainment to those who demonstrated an integrated and agile approach. Hitherto, entertainment as an affordance for organisations was not identified in the extant literature. However, this was found in the empirical research and consequently this finding converged in both studies.

8.4.2 Main theme 1: Affordances - To provide offers (sales cycle)

The literature review identified offers as a use or gratification of social media for individuals, encompassed within the notion of remuneration, which was explicated as a reward or incentive (Muntinga, Moorman and Smit, 2011), or as a comparison exercise (Brandtzæg, 2010). Within organisations, generating sales as an affordance of social media application, included the provision of offers in the form of vouchers and reductions (Andzulis, Panagopoulos and Rapp, 2012; Tsimonis and Dimitriadis, 2014). This was supported in the extant research and both studies. In Research Phase One it was found that digital natives were more likely to use social media for offers.

Research Phase Two provided a mixed response that showed a lack of understanding of the concept of offers, which were variously interpreted as promoting third-party campaigns, promoting the organisation's own business, providing competitions or delivering an opportunity to make charitable donations.

This confirms an earlier finding in the literature (Baird and Parasnis, 2011), where customers sought discounts, but brands failed to identify this as a motivation for using social media. It may be that rather than the perception of an offer as a discount or bargain – as is often used in social media – for these participants in their organisations, is not recognised, thus an offer constitutes a proposal or recommendation.

Furthermore, the participants provided examples at all levels within the Social Media Affordances Maturity Scale and therefore offers – as part of the sales cycle, is confirmed as an affordance for organisations. This was supported in the extant literature and converged in both empirical studies.

8.4.3 Main theme 1: Affordances - To interact with customers

Interaction is a key element within social media marketing and was identified as a focus within the social media definitions (Hogan and Quan-Haase, 2010; Kent, 2010; Järvinen *et al.*, 2012; Ryan, 2014; Carr and Hayes, 2015). Also termed engagement, this was acknowledged in the literature surrounding the individual uses and gratifications of social media (Shao, 2009; Muntinga, Moorman and Smit, 2011; Whiting and Williams, 2013; Krishen *et al.*, 2016), as well as an affordance for organisations (de Vries, Gensler and Leeflang, 2012; Kietzmann *et al.*, 2012; Hollebeek, Glynn and Brodie, 2014; Argyris and Monu, 2015).

The use of interaction as an affordance of social media marketing was found in both studies, therefore this finding converged. However, within the two studies, there were differences based on generational cohorts and the presence and absence of marketing qualifications. Findings from Research Phase One, showed that those with formal marketing qualifications were more likely to use social media for interaction, whilst the findings from Research Phase Two, found that only one participant with formal marketing qualifications had incorporated interaction into their key performance indicators (KPIs).

Research Phase Two provided greater insights and demonstrated recognition of the evolution of social media (Hooley, Marriott and Wellens, 2012), and how interaction is growing. There was understanding of the scope of interaction situated within a global dimension, in a ubiquitous always-on state (Lamberton and Stephen, 2016). However, moving beyond simple transactional engagement, where the purpose of the interaction is to increase the audience, this engagement ranged from a semi-formal approach to share best practice, to an informal conversation. The ability to share content (Shao, 2009; Muntinga, Moorman and Smit, 2011; Whiting and Williams, 2013; Argyris and Monu, 2015), concerned interaction as an exchange, which represents a primary purpose of social media.

The theme of conversion, as a purpose of interaction, was evidenced by one participant as their organisation had recognised its importance as part of the sales cycle, thus interaction has become a business objective.

Looking back at McQuail's (1983), mass communication theory, social interaction was identified as a key factor which remains valid as social media offers a method of multi-way interaction, sharing suggestions and providing feedback (Canhoto and Clark, 2013). The use of interaction enables customers to seek and share content (Kietzmann *et al.*, 2012; Abrantes *et al.*, 2013), is a recurring theme in social media and a recognised phenomenon between businesses and customers (Järvinen *et al.*, 2012). Thus examples of interaction were evidenced at all levels within the Social Media Affordances Maturity Scale and is thus confirmed as an affordance for organisations which converged in both empirical studies.

8.4.4 Main theme 1: Affordances - To gain reviews

Reviews and testimonials where individuals add or read user-generated content, has been recognised in the extant literature (Bruns, 2006; Muntinga, Moorman and Smit, 2011). This construct is further acknowledged as an affordance of social media by organisations (Weinberg *et al.*, 2013; Saboo, Kumar and Ramani, 2016), as reviews represent brand-related content (Muntinga, Moorman and Smit, 2011), and can impact sales (Baird and Parasnis, 2011; Babić Rosario *et al.*, 2016).

Thus the empirical research supported the extant literature. Moreover, Research Phase One demonstrated that digital natives were more likely to use social media for reviews. Whilst the affordance of reviews was supported in Research Phase Two, this theme featured across all generational cohorts.

Participants within Research Phase Two, provided evidence that their organisations were at different stages of obtaining reviews, some of whom had fully automated systems, whereas others explicitly avoided online reviews.

Whilst it has been found that online feedback could provide insights for the organisation (Quinton, 2013), the application of online reviews may be based on the level of maturity of social media affordances within the organisation. Thus, there are managerial implications as the skill of managing online reviews will need to be addressed within organisations, as the ability to post reviews, whether positive or negative, is effortless (Shin, Song and Biswas, 2014). As noted by Lamberton and Stephen (2016, p. 154), when discussing Era 2 of digital, social media and mobile marketing, using the example of the online review site Yelp, ‘Between 2005 and 2006, the number of reviewers skyrocketed from 12,000 to 100,000’, and thus the number of reviews is likely to continue.

Managing and responding to online reviews, termed Webcare (Ghosh, 2017), has become a critical marketing function (Ahmad and Laroche, 2016), which can mitigate service failure (Ghosh and Amar, 2018; Weitzl, Hutzinger and Einwiller, 2018), and reduce future brand damage. Therefore reviews is confirmed as an affordance for organisations, which was supported in the extant literature and converged in both empirical studies.

8.4.5 Main theme 1: Affordances - To deliver customer service

Online customer service offers individuals the chance of being heard, gaining better service from organisations and resolving complaints (Muñiz, Jr. and Schau, 2007; Dollinger, 2015; Istanbulluoglu, 2017), and for organisations, this can facilitate long-term customer relationships (Canhoto and Clark, 2013). Thus customer service as an affordance was found in the literature and within a pragmatist ontology provided ‘warrantably assertible conclusions’ (Dewey, 1938, p. 1), in both empirical studies.

As Canhoto and Clark (2013, p.523), commented ‘the change in how people use the Internet has produced a new set of expectations’ and part of this is customer service. The different levels of social media application were identified in the literature review, within the Stages of Growth in social media business presence, implementation and management model (Duane and O’Reilly, 2016), and this theme resonated with this model, as was found with managing reviews online. Once again, the extended Social Media Affordances Maturity Scale was utilised with Level 0, as some participants purposefully avoided any form of online customer service.

Research Phase One found that there were differences based on generational cohorts and the presence or absence of formal marketing qualifications. Digital natives were more likely to use social media to deliver customer service and marketers with formal marketing qualifications were more likely to use social media to deliver customer service within their organisations. However, Research Phase Two did not support these distinctions as social media as a customer service channel is becoming ‘business as usual’ for all. Differences that were seen, focused on the approach; reactive and proactive. Whilst there were examples of different applications of gaining reviews within the Social Media Affordances Maturity Scale, there were no notable differences between generational cohorts and the presence or absence of formal marketing qualifications.

According to Kietzmann *et al.* (2011, p. 249), customer service via social media has highlighted that organisations are ‘no longer in control of the conversation’ and as social media is increasingly used as a customer service tool (Gunarathne, Rui and Seidmann, 2018), and is further driven by customers, this should thus form a cornerstone of organisations’ social media strategies. The challenge for smaller organisations is the ‘always on’ state of social media and the need to respond promptly, it may be that guidelines within a social customer relationship management framework (Wang and Kim, 2017), are required.

Consequently, there are managerial implications for those at the lower levels of the Social Media Affordances Maturity Scale. Hence customer service is confirmed as an affordance for organisations, which was supported in the extant literature and the empirical studies, thus this affordance converged in both research phases.

8.4.6 Main theme 1: Affordances - For customer segmentation

According to Jones, Shaw and McLean (2013), market segmentation is attributed to Smith (1956), and this concept has developed into a marketing approach where individuals, groups or organisations are classified when they demonstrate ‘one or more similar characteristics that cause them to have relatively similar product needs and buying characteristics’ (Simkin *et al.*, 2016, p. 204). Canhoto, Clark and Fennemore (2013), argued that customer segmentation is a recognised aspect of both marketing theory and practice and can be enhanced by social media.

Customer segmentation was explored in Research Phase One as 122 out of 448 respondents stated that their used this affordance. Research Phase Two sought explanations from participants which found that the segmentation was either one aspect of demographics (age, gender, geographic location), or psychographics (purchasing behaviour), or webographics (email subscriber behaviour, preferred content). The challenge is that obtaining such limited fragments of the segments does not lead to full persona development (Hendriks and Peelen, 2013). As noted by Canhoto, Clark and Fennemore (2013), segmentation processes and application are not without difficulties within a social media environment. Whilst Facebook Insights provides basic details regarding the number of those visiting the site, seeing the articles and interacting, which can contribute towards digital metrics, there is little opportunity to fully segment customers in this way. Similarly, using LinkedIn as a research tool, or monitoring Twitter followers, enables the organisations to provide richer data for the customer database, but does not segment customers. This concurs with research from Chen, Lin and Yuan (2017, p. 580), who discussed these tools as being able to 'monitor, analyze and manage social media information statistics and the impact of social brands', rather than facilitating customer segmentation.

Although, one element of segmentation that is partly offered within Facebook Adverts, is to group audiences, which was employed by some participants. However, due to the platform's limited data sharing, they could not identify 'key aspects of that segment's typical customer's needs and experiences' (Lemon and Verhoef, 2016, p. 73). Furthermore, this generic grouped data cannot be attributed to specific individuals (Facebook, 2018), thus some segmentation variables may be difficult to ascertain and there may be disparity between the programmes used and associated customer identity. Moreover the associated customer identity information from social media platforms is liable to change and users now control access to their data (Constantinides, Henfridsson and Parker, 2018).

Thus whilst evidence of the process of customer segmentation was supported in the literature, this was partly explained in the empirical research. However, this was applied at different levels of the Social Media Affordances Maturity Scale, with many participants demonstrating a superficial understanding, yet this remains an affordance which converged in both research phases.

8.4.7 Main theme 1: Affordances - For brand management

Visibility and the need to be present on social media emerged from the participants and has been recognised as an extension of the notion of brand awareness. Argyris and Monu (2015, p. 149), termed the notion as presentability – being present – and managing the organisation's online image, which 'has an influence on organizational perceptions in times of crisis, buying preferences, and trust' (Yang and Kent, 2014, p. 563).

Having been identified in the literature, this was supported in the empirical research. Research Phase One found that 407 respondents (out of 448) stated that brand management in terms of brand building and awareness was an affordance of social media marketing. This converged within Research Phase Two as all participants used social media as part of their application of brand management.

Differences were found between the two research phases since Research Phase One indicated that those with formal marketing qualifications were more likely to use social media for brand management. Yet the findings from Research Phase Two, illustrated that using social media as part of brand management was recognised as important by all participants, regardless of qualifications. This was supported in the extant literature as searching and finding information online transforms traditional marketing, where customers can decide when and where they obtain brand information, altering the relationship between customer and organisation (Hennig-Thurau *et al.*, 2010).

The participants provided examples at all levels within the Social Media Affordances Maturity Scale and therefore brand management is confirmed as an affordance which converged in both research phases.

8.4.8 Main theme 2: Social media strategy - Measure

Measurement in social media is obfuscated, lacks clarity and the absence of meaningful measures has been noted (Logan, 2014; Popky, 2015). According to Valos *et al.* (2015), the lack of clear measurement is a barrier to social media implementation and may explain why some organisations selected vanity metrics, which are at a lower level on the Social Media Affordances Maturity Scale.

However, in contrast, numerous metrics have been recommended in academic literature, such as: the impact of engagement on brand perceptions (Tsimonis and Dimitriadis, 2014), content marketing (Martin, 2016), consumer mindset (Colicev *et al.*, 2018), digital engagement (Yoon *et al.*, 2018), Facebook likes (Lipsman *et al.*, 2012; John *et al.*, 2017), and tweeting activities (Bruns and Stieglitz, 2013). Whilst the literature review identified the UK industry standard for online audience measurement (UKOM, 2017), this focuses solely on audience measurement. Thus the deficiency in this area is the absence of a recognised set of measure for social media. However, this knowledge gap surrounding metrics is not altogether surprising with the choice available, as *The Field Metrics Guide* lists 197 different metrics for marketers (Rappaport, 2014a). There is confusion amongst identifying the accurate metrics, such as trying to understand what created an online sale – the social media post, an online advert or something else? This has resulted in calls for greater accountability and comprehension of how to attribute or understand the real source of an online sale (Gaskill and Winzar, 2013; Lindsay, 2014), as well as better clarity in metrics (Popky, 2015).

Thus the literature presented the concept of measurement within social media as a factor within social media strategy, yet there were no definitive guidelines.

Research Phase One illustrated that measuring results was more prevalent in those possessing formal marketing qualifications or digital natives. A similar finding was identified in Research Phase Two as it was mainly those with formal marketing qualifications, who had greater understanding of social media metrics.

Those without formal marketing qualifications demonstrated a lack of understanding with a focus on vanity metrics and as Rappaport (2014b, p. 110) remarked, ’numbers such as these make people feel good even as they give the impression that digital marketing efforts are paying off’. In exploring usage of web analytics, Järvinen and Karjaluoto (2015), observed in their manufacturing case companies that the ‘lack of skills was apparent from their inability to understand the opportunities’ (p. 123). This outcome was confirmed in Research Phase Two, by those without formal marketing qualifications.

Hence, there are gaps between practice and academic research and thus there are managerial implications as the lack of clear measurement removes informed guidance and it is thus challenging to inform social media marketing budgets and assess whether they have been effective (Valos *et al.*, 2015).

Consequently, measuring social media is confirmed as an affordance for organisations, which was supported in the extant literature and converged in both empirical studies.

8.4.9 Main theme 2: Social media strategy - Strategy

The literature review identified that the lack of a strategy is a barrier to managing and implementing social media within organisations (Pletikosa-Cvijikj, Dubach Spiegler and Michahelles, 2013; Valos *et al.*, 2015; Ogbuji and Papazafeiropoulou, 2016), and a clear vision for social media application within organisations was recommended in extant works (Kaplan and Haenlein, 2010; Kiron *et al.*, 2012; Vásquez and Escamilla, 2014; Werder, Helms and Slinger, 2014; Kiráľová and Pavlíčeka, 2015; Felix, Rauschnabel and Hinsch, 2017).

One study which considered the adoption and development of social media strategy was proposed by Duane and O'Reilly (2016), in their Stages of Growth model. Rather than advising a strategy was needed, they postulated that organisations may be at different stages of their social media journey. The model commenced with Stage 1 - Experimentation and Learning, to Stage 2 - Rapid Growth, Stage 3 - Formalisation, Stage 4 - Consolidation and Integration, leading to Stage 5 - Institutional Absorption. In this study, the Duane and O'Reilly (2016) model was further developed to incorporate an additional stage, Stage 0, where there was an absence of discernible activity. This was employed within two affordances; for obtaining reviews and managing customer service. However, in the area of strategy, all participants in Research Phase Two felt they had some form of strategic plan, or were actively in the development phase. This resonated with Research Phase One as most respondents stated that they had a clear strategy and vision for social media management, regardless of generational cohort, or the presence or absence of formal marketing qualifications.

Thus strategy within social media, was found in the literature review and supported by the empirical research and therefore as a finding, converged.

This section has explicated where findings converged and thus the investigation of the critical success factors within organisations, was warranted within the empirical research, which asserted the following social media affordances for organisations: brand management, customer segmentation, customer service, interaction (engagement), entertainment, remuneration (offers), and sales cycle (testimonies and reviews). Two critical factors were confirmed: clear strategy and vision for social media management and measure results from social media. The next section will discuss where findings complemented, explained or illuminated the other method.

8.5 Empirical Research: Findings complemented, explained or illuminated the other method

8.5.1 Main theme 1: Affordances - For new product development

Recognised in the literature review (Rathore, Ilavarasan and Dwivedi, 2016), and confirmed as an affordance, new product development was used by 94 out of 448 respondents, or twenty per cent in Research Phase One. This was inconsistent with the literature which advocated the use of social media for new product development. This was illuminated in Research Phase Two, as the majority (22 out of 26) did not include social media in their new product development process.

The four participants who provided evidence of using social media as part of the new product development process described surreptitious research and observing competitors, rather than developing or co-creating new products or services amongst customers in an online setting. As noted in the literature, product features could be developed through social media mining (Rathore, Ilavarasan and Dwivedi, 2016). Whilst there was concern about sharing new product ideas with competitors and the preference for a covert approach, working with internal design teams, this may represent a missed opportunity for organisations.

Thus whilst evidence of the process of new product development was supported in the literature, this was explained, but not applied by participants in the empirical research.

This section has explicated where one finding explained the other method and the next section will discuss where findings showed disagreement between the two study components.

8.6 Empirical Research: Findings showed disagreement between the two study components

This section will consider where the findings showed disagreement between the two study components.

8.6.1 Main theme 2: Social media strategy - Resources

The literature considered resources within the organisational setting and extant research recommended that skills and investment were required to manage and deliver social media activities (Kiron *et al.*, 2012; Mills and Plangger, 2015; Valos *et al.*, 2015). Resources were identified as a consideration within some social media guidelines (Vásquez and Escamilla, 2014; Werder, Helms and Slinger, 2014; Kiráľová and Pavlíčeka, 2015), although they were omitted in others (Kaplan and Haenlein, 2010; Baird and Parasnis, 2011; Felix, Rauschnabel and Hinsch, 2017). Yet resources is a key factor in any form of marketing management (Davcik and Sharma, 2016).

Research Phase One found that digital natives were more likely to have internal staff managing social media. Both digital natives and qualified marketers were more likely to allocate extra resources to use social media. Yet Research Phase Two found no discernible differences between generational cohorts and those with or without formal marketing qualifications, thus the findings showed disagreement between the two study components.

The differences between Research Phase One, the online survey and Research Phase Two - semi-structured interviews, may be due to scale. The online survey gained responses from 448 individuals whereas the semi-structured interviews involved 26 of these individuals. As Creswell and Plano Clark (2018) noted, the qualitative sample size is smaller than the quantitative phase, although in both methods, the respondents and participants represented a wide range of sectors and job roles. According to Duane and O'Reilly (2016), a dominant problem with social media management is lack of resources, although these participants managed the process, or others, at Stage 0, where there was no evidence of activity, simply avoided the issue.

The next section will discuss the new themes which emerged from Research Phase Two.

8.7 Empirical Research: Emerging themes

The GRAMMS guidelines (O'Cathain, Murphy and Nicholl, 2008), recommended that where a theme was identified in one method but not another, it should be described.

This section will discuss themes which were identified in Research Phase Two, although they did not emerge in Research Phase One. Research Phase Two illustrated that participants who were digital natives, exhibited four digital differences: (i) Age and ability; (ii) Attitude to social media; (iii) Attitude to marketing education; and (iv) Concern using social media,

8.7.1 Digital differences 1: Age and ability

Research Phase Two, showed a phenomenon which was not identified in the Research Phase One – recognition of age and ability within the social media marketing environment. This was idiographic, rather than pertaining to the organisations and was present among digital immigrants, several of whom lacked confidence and felt that younger people were better at social media.

Whilst this is a recognised phenomenon in the literature, this was supported by the empirical research. Thus several participants born before 1980 lacked confidence in their capacity to utilise social media which relates to the approach, skills and attitude of users. The confident use of technology and the ability to manage digital marketing is a core construct within the European Commission's Digital Competence framework (European Commission Directorate-General for Education and Culture, 2012; Stone, 2014; Curtarelli *et* *al.*, 2016). Whilst outside the scope of this study, it is an area requiring further research (Murawski and Bick, 2017), and has managerial implications.

8.7.2 Digital differences 2: Attitude to social media

Over twenty years ago, Glister (1997), remarked in his book *Digital Literacy* that 'one of the phenomena of cyberspace is the fact that people seem energized by it' (p. 62) and several participants, under their own agency, demonstrated this enthusiasm. Many of the digital immigrants had opinions and shared their personal attitude to social media, as they had witnessed its launch and development.

This was not identified in the extant literature and is an area that may require further study. Thus the empirical research has provided a generative contribution to consider the attitude of those using social media within an organisational context.

8.7.3 Digital differences 3: Attitude to marketing education

The third digital difference was the attitude to marketing education. Research Phase One found that digital natives were more likely to have formal marketing qualifications than digital immigrants. Whilst the sample frame consisted of people working in marketing, this was unexpected and the significance had a medium Cramér's V (ϕc) effect size. As Cohen (1992, p. 156), commented when he proposed the effect size (ES) scale, '[the] medium ES represents an effect likely to be visible to the naked eye of a careful observer'. Thus to some it may seem obvious that digital natives are more likely to have formal marketing qualifications than digital immigrants. However, the digital natives demonstrated their intrinsic motivation (Ryan and Deci, 2000), to gain qualifications, whereas digital immigrants illustrated alternative approaches from employing others with qualifications or having taken day-courses. Of the digital immigrants, nine had marketing qualifications; the remaining eleven did not, with no interest in pursuing formally recognised qualifications.

A supplementary observation was the range of formal marketing qualifications that the digital natives possessed, which included those from levels 3, to 6 and 7: BTEC Digital Marketing, CIM Diploma (including Digital Strategy), Post-graduate Diploma Digital Marketing and MSc Digital Marketing. Whilst this is not a classic digital divide as all respondents and participants had access to the internet – a pre-condition of survey involvement was that their organisation used social media for business purposes – there is a distinction between generational cohorts and the presence of formal marketing qualifications.

Thus differences were found amongst generational cohorts and where respondents claimed the presence or absence of formal marketing qualifications. There are pragmatic managerial implications in terms of training provision and recruitment, where marketing managers without relevant qualifications may seek to recruit those who can support this area. A further implication is for those providing training as digital natives will identify what they require as they are keen to develop their skill-sets, whereas digital immigrants may benefit from both a strategic and tactical understanding of the application of social media within organisations.

8.7.4 Digital differences 4: Concern using social media

Concern about using social media, in case of erroneous actions, was a factor which has been previous identified in the literature (Williams and Buttle, 2014), as examples of misplaced posts negatively impacting organisations has been widely reported (Miles and Mangold, 2014; Schmidt and O’Connor, 2015).

The notion of concern within social media application for organisations is valid as extant research has evidenced failures through staff errors (Miles and Mangold, 2014; Schmidt and O’Connor, 2015), or service (see for example: Gregoire, Salle and Tripp, 2015). However, these concerns could be reduced through the development of a social media strategy (Mills and Plangger, 2015).

Thus differences were found amongst generational cohorts and where respondents claimed the presence or absence of formal marketing qualifications.

8.8 Working typologies for those using social media in organisations

Chapter Two identified typologies of internet and online media users (see for example: Kozinets, 1999; Mathwick, 2002; Brandtzæg, 2010), which focused on usage frequency and variety or group involvement, yet there is no typology of those responsible for social media within organisations.

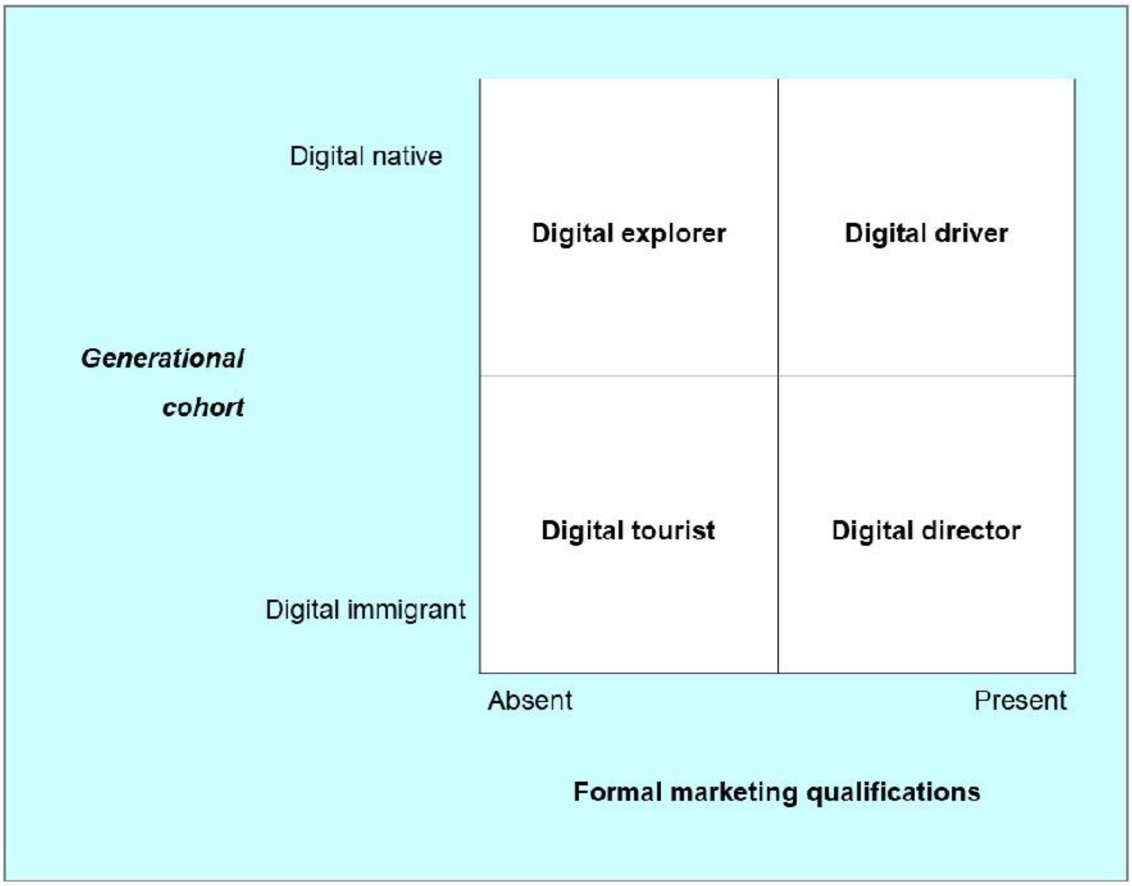
From the online survey and subsequent semi-structured interviews, differences were noticed in the application of social media within organisations. This study framed the research around two generational cohorts and formal marketing qualifications, which is where the differences were visible. Therefore four groups of people working in marketing with responsibility for social media were identified in Chapter Seven and Table 7.28 presented the types of social media marketing managers, based on generational cohort and presence or absence of formal marketing qualifications, with characteristics and example participant quotations. Extending this further, nominal classifications have been proposed for the types of social media manager and these are presented in Table 8.4.

Table 8.4 Classifications for social media managers

CLASSIFICATION	TYPE OF SOCIAL MEDIA MARKETING MANAGER	CHARACTERISTICS
Digital driver	Digital native with formal marketing qualifications	• Demonstrated competent use of social media technology and tools to the extent where they combine different systems • Ability to adapt typical social media usage for their own purposes
Digital director	Digital immigrant with formal marketing qualifications	• Assigned others to use social media • Proactively seeking brand awareness through social media, in particular having the need to be visible online
Digital explorer	Digital native without formal marketing qualifications	• Seek help when needed to use social media technology and tools • Keen to explore different formats of social media content • Lack of understanding of social media measurement with a focus on vanity metrics
Digital tourist	Digital immigrant without formal marketing qualifications	• Lack confidence in ability to use social media • Lack of confidence or understanding using social media technology and tools • Concerned about social media and recognise the need to be visible online • Lack of understanding of social media measurement with a focus on vanity metrics.

The criteria for the classifications is firstly the generational cohorts (digital native, digital immigrant) and secondly the presence or absence of formal marketing qualifications. The typologies are discussed further in this section and presented in Figure 8.1.

Figure 8.1 Working typologies for social media managers



8.8.1 Digital drivers: digital natives, with formal marketing qualifications.

There were four participants in this category in Research Phase Two. These social media managers are leading the way and driving all aspects of social media within their organisations. Their behaviours include competent use of online metrics and application of Google Analytics, to such a level that some are adapting or combining the data for better reporting. The notion of combining technology was identified in Chapter Three (Vuori and Jussila, 2016), and in this cluster they demonstrated confident hands-on use of tools (e.g. Hootsuite) and demonstrated skilful use of applications for other purposes.

The digital drivers' use of additional software and ability to utilise the social media networks demonstrates an agility that was not evident in the other groups.

8.8.2 Digital directors: digital immigrants, with formal marketing qualifications

The semi-structured interviews included ten participants in this category, although their qualifications were gained in a pre-digital age. Whilst they have responsibility for social media within their organisations, their approach is at arms-length. Their focus is directing and leading social media operations and they may either have less time or be less familiar with the application of various tools, thus they outsource or have staff to whom they delegate quotidian tasks.

Digital directors benefit from their formal marketing qualifications as they understand fundamental issues in marketing and recognised the process and requirements.

8.8.3 Digital explorers: digital natives, without formal marketing qualifications

Two of the participants were in this category and both had hands-on roles. They are exploring the social media environment and are not concerned about asking for help and seeking support from third-parties.

As a group born into a digital environment, these digital explorers were pioneers in their organisations and would trial and experiment. They did not exhibit the fear of social media shown by some of the digital immigrants without qualifications.

8.8.4 Digital tourists: digital immigrants without formal marketing qualifications

Kozinets (1999), identified a cluster of tourists in his typology of virtual communities of consumption. He described tourists as those ‘that maintain only a superficial or passing interest in the consumption activity’ (p. 254). Whilst the typology in this study applies to social media managers, rather than user consumption, this group exhibited less understanding or a superficial knowledge. There were ten participants classified as digital tourists, trying to understand the landscape. They lack confidence and are uncertain about choices in the new digital environment. So-named as they are travelling into this new world and fear making mistakes. However, some digital tourists are more intrepid, evidenced by their willingness to experiment, but without the resilience to fully embrace social media marketing within their organisations. Furthermore, several digital tourists demonstrated both an enthusiasm and concern for social media. Those with the concern are failing to address the issue that social media has changed how business operates (Rolland and Parmentier, 2014).

Whilst these typologies require further investigation as they are based on a limited number of cases, this contributes towards greater understanding of the requirements for digital training within organisations. The typologies identify opportunities for specialist education, consultancy and support within organisations which could be addressed by educational establishments, membership bodies and other providers. This is a pertinent recommendation within a pragmatist epistemology and ontology as Dewey evolved pragmatism into his philosophy of education (Stuhr, 2003), seeking solutions for those requiring new skills.

8.9 Guidelines for social media application within organisations

This section will consider the final research objective: ‘To recommend guidelines for social media application within organisations’ by addressing the research question: ‘What are the guidelines for best application of social media marketing in organisations?’.

8.9.1 Stages towards the identification of critical factors in social media application and learning areas

Providing guidelines for best application of in social media marketing within organisations has involved addressing the research objectives: (1) ‘To review the literature on social media and social media application in organisations in order to identify critical success factors’; and (2) ‘To conduct primary research in order to determine and evaluate current social media marketing application within organisations'. This section brings these elements together to answer Research Objective 3: 'To recommend guidelines for social media application within organisations'.

Teddlie and Tashakkori (2009), discussed the notion of making inferences to provide recommendations within a mixed-methods study. Inferences are derived from the integration of the quantitative and qualitative data sets. They suggested that a good inference 'establishes relations between variables while providing reasonable certainty that such relationships did not happen by chance' (Teddlie and Tashakkori, 2009, p. 297). The quantitative findings from Research Phase One were examined using Pearson's chi-square (χ^2) test for association and demonstrated areas of statistical significance with a ninety-five per cent confidence level and a five per cent margin of error, thus were less likely to occur by chance. However, the sample was not probabilistic and therefore this cannot be generalised to a wider population. Although it is argued that this was one method of ensuring that the relationships did not occur by chance. This was further warranted by integrating these findings into Research Phase Two and thus, where a medium or small Cramér's V (ϕc) effect size was identified, this was integrated into the design of Research Phase Two to enable further investigation. Therefore the inferences presented in this section were based on reasonable associations between the different factors with justification that they did not happen by coincidence.

The first inference is the identification of the critical factors in social media marketing application. In order to ensure that this process can be understood by academics and practitioners, this section describes the framework forming the basis for this inference, which is shown in Figure 8.2 Stages towards the identification of critical factors in social media application. These stages are visually summarised in Figure 8.2 as a consecutive process within the mixed-methods explanatory sequential design. For convenience, each stage in Figure 8.2 is noted by an alphabetical letter (from A to K), which is both referred to and explained in this section.

Figure 8.2 Stages towards the identification of critical factors in social media application

Individual user purposes, organisational critical affordances and social media guidelines that contributed to Research Phase One, leading to the recognition of best application and omissions in Research Phase Two and resulting in the identification of critical factors in social media application and recognition of learning areas.

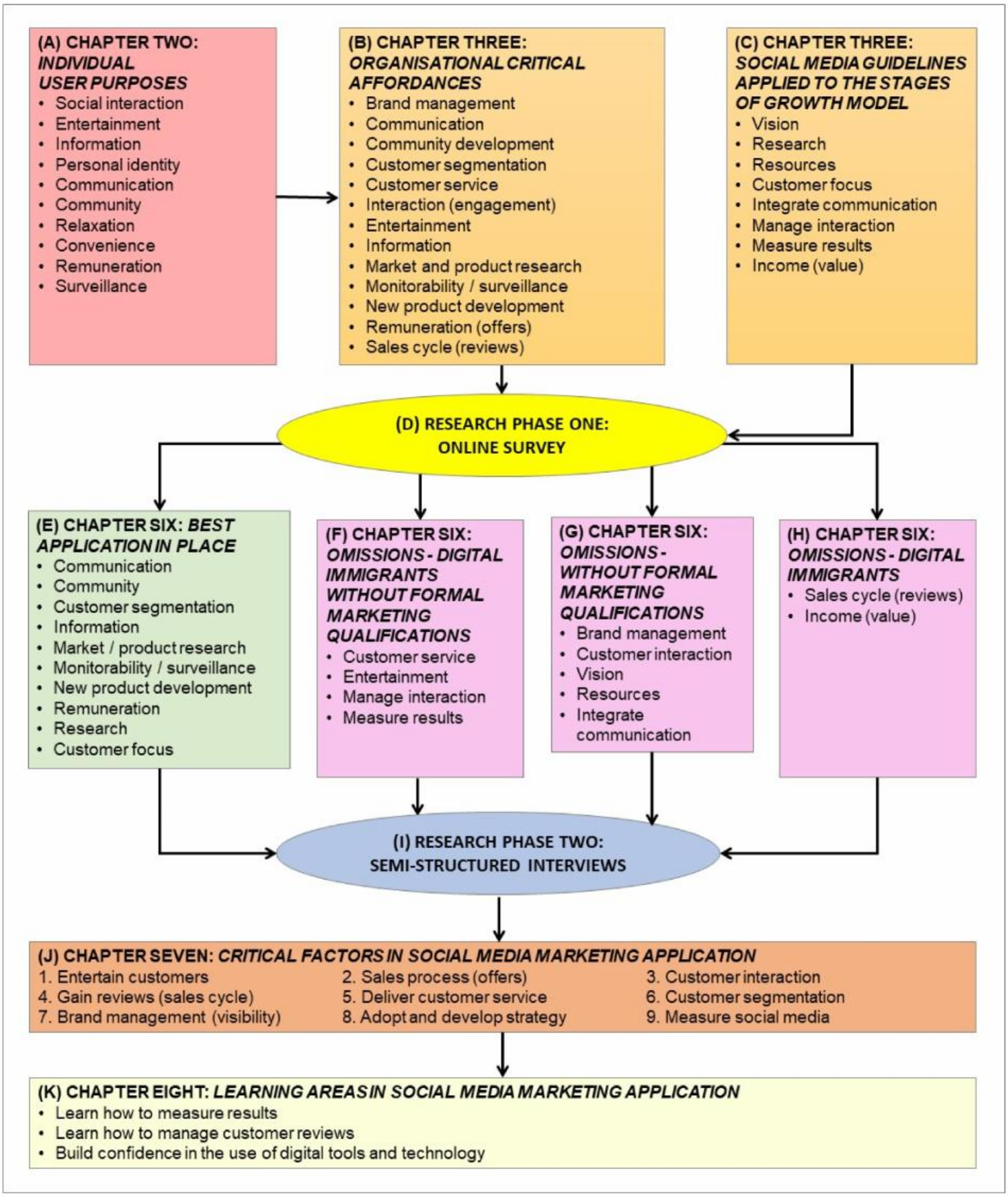


Figure 8.2 shows that Chapter Two provided the individual user purposes (item A) which were subsequently applied to organisations in Chapter Three and the critical affordances of social media usage were subsequently identified (item B). To ensure that no key elements of social media application were omitted, Chapter Three additionally identified extant strategic social media guidelines which were subsequently synthesised within the Stages of Growth (SoG) model (item C).

When combined (items B and C), this resulted in the identification of 21 purposes and affordances of social media application within organisations:

- Brand management;
- Communication;
- Community development;
- Customer segmentation;
- Customer service;
- Engagement;
- Entertainment;
- Information;
- Market and product research;
- Monitorability / surveillance;
- New product development;
- Remuneration (offers);
- Sales cycle (reviews);
- Vision;
- Research;
- Resources;
- Customer focus;
- Integrated communication;
- Manage;
- Measure results; and
- Income - value.

This extends the affordances identified in the earlier work of Argyris and Monu (2015); these elements were the basis for the questions in Research Phase One (item D).

Chapter Six showed the results of Research Phase One which identified behavioural differences between digital natives and digital immigrants, and between those with and without formal marketing qualifications. Whilst there were areas of best application in place (item E), there were fundamental omissions amongst the different types of social media marketing managers (items F, G and H).

Critical factors in social media marketing application were investigated further through Research Phase Two (item I), in Chapter Seven. This resulted in the identification of critical factors in social media marketing application (item J).

Further integrating the two methods using an explanatory mixed-methods sequential design commenced with bringing the findings from Research Phase One, and utilising them in Research Phase Two. This was presented in Chapter Eight, which recognised learning areas in social media marketing application (item K) for both digital immigrants as well as those without formal marketing qualifications.

Therefore the critical factors in social media marketing application can be defined as:

- Entertain customers;
- Sales process (offers);
- Customer interaction;
- Gain reviews (sales cycle);
- Deliver customer service;
- Customer segmentation;
- Brand management (visible online);
- Adopt and develop strategy; and
- Measure social media.

Furthermore, areas where additional learning may be required for digital immigrants or those without formal marketing qualifications, were established as:

- Learn how to measure results;
- Learn how to manage customer reviews; and
- Build confidence in the use of digital tools and technology.

8.9.2 Deciding the areas on which to focus in social media application

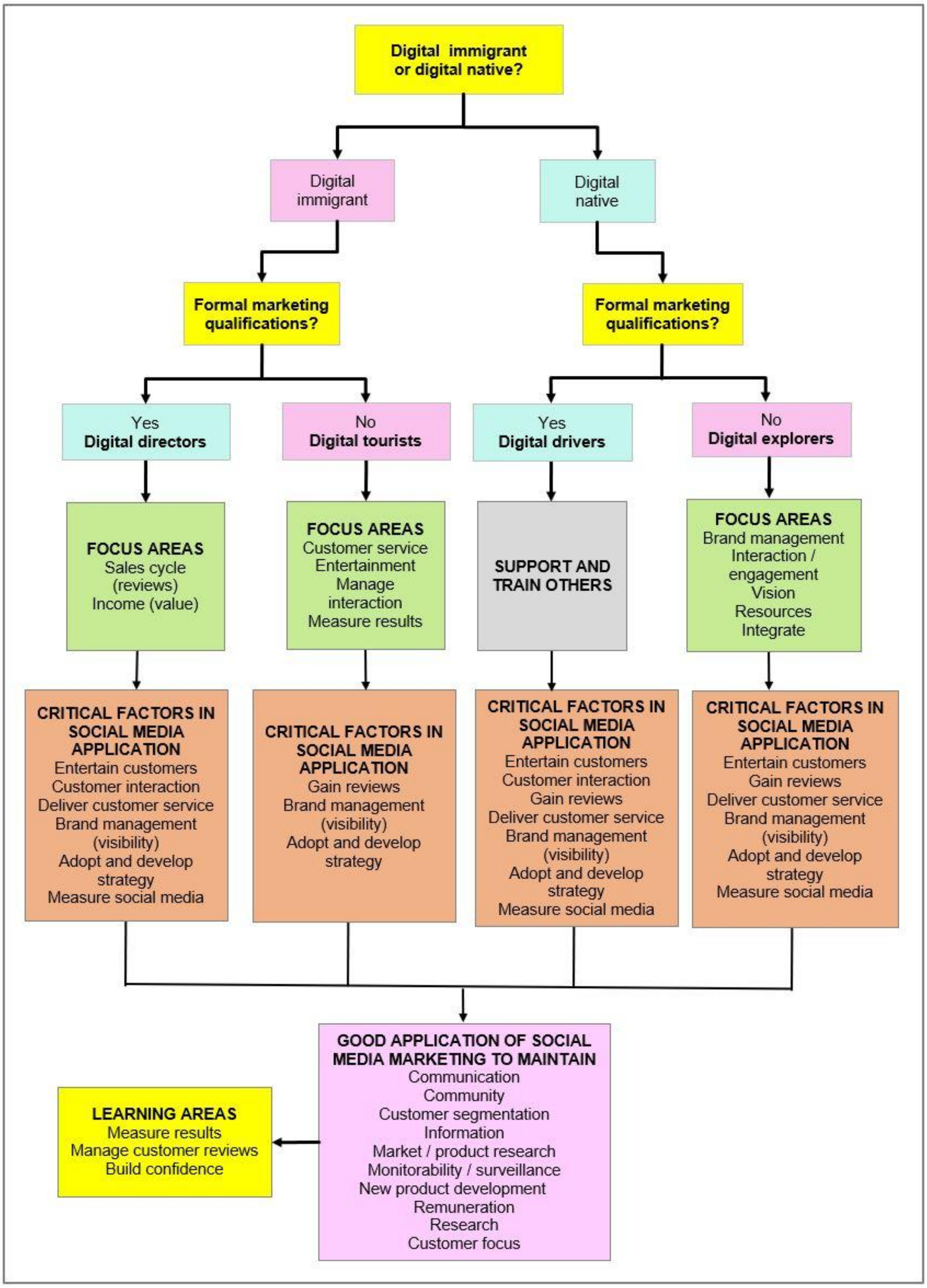
Having identified the critical factors in social media marketing application and highlighted three learning areas, these are applied to those with and without formal marketing qualifications and the generational cohorts: digital immigrants; and digital natives.

Earlier in this chapter, different classifications of social media managers, as a working set of four typologies for those using social media in organisations were proposed, as practical outcomes (Scott and Briggs, 2009), to more easily recognise these clusters. These were founded on two primary categories of people working in marketing: (i) generational cohorts - digital natives and digital immigrants; and (ii) the presence or absence of formal marketing qualifications. For these variations, four types of social media managers were identified:

(i) digital directors;
(ii) digital tourists;
(iii) digital drivers; and
(iv) digital explorers.

Therefore to help guide best application of social media marketing, Figure 8.3 applies these typologies to the areas where most benefit would be gained. The choices are framed within a social media application decision tree (Virine and Trumper, 2008), as a helpful way to aid organisations to make better decisions.

Figure 8.3 Decision tree to identify focus areas of social media application and critical factors for different classifications of social media managers



8.9.3 Focus areas

The focus areas are those where the four different classifications of social media managers were identified in Figure 8.3, and these are discussed further in this section.

Digital directors

The digital immigrants who possess formal marketing qualifications - demonstrated knowledge gaps in the area of reviews and understanding value in social media. In examining the eras of social media Lamberton and Stephen (2016), confirmed this phenomenon and observed how the two are connected as ‘marketers remained largely uncertain about how to effectively use social media for marketing purposes … despite research indicating the value-relevant impacts of social media–related concepts such as [user-generated content] UGC’ (p. 158). Comprehending the benefit of reviews and encouraging customers to provide this content will help demonstrate the value of social media for digital directors. Other measures may include understanding where social media brings value to the organisation. Whilst vanity metrics (Rappaport, 2014b), such as the number of likes and followers are to be discouraged, there is a value of fans: their positive online influence and subsequent sales (Lipsman *et al.*, 2012). Time spent on social media networks has been linked to buying behaviour (Zhang *et al.*, 2017), thus this is an area where digital directors would benefit from further comprehension.

Digital tourists

The digital immigrants without formal marketing qualifications - were lagging behind in several areas. Their focus is best placed on the online customer contact. This involves embracing customer service online and thus managing the interaction, rather than ignoring or discouraging these forms of communication. Interaction is a recurring theme in social media usage (Muntinga, Moorman and Smit, 2011; Whiting and Williams, 2013), and will continue to grow. Entertainment, whether purpose or socially-driven (Luchman, Bergstrom and Krulikowski, 2014), is another area to be considered, although the digital tourists identified in this study were fearful of what they contributed to social media. Moving specific aspects of customer service online, in a pilot setting, may provide the evidence to evaluate the benefit and assess whether time or other resources were saved, before embracing all of the critical factors.

Digital drivers

No focus areas were identified for digital drivers, the digital natives with formal marketing qualifications. Thus their role is one of supporting and training others in their organisations.

Digital explorers

The digital natives without formal marketing qualifications - fell behind in traditionally established areas of marketing such as brand management and integrated communications. Brand management was recognised by digital immigrants [CONTENT REDACTED TO PRESERVE ANONYMITY OF PARTICIPANTS] although less understood by digital explorers. Whilst acknowledged as an area on which to focus, the integration of social media interaction into business processes may be an area outside of the control of this category, if their role does not involve making management decisions which Valos *et al.* (2015) recognised as the lack of 'coordination of internal activities when implementing SM [social media]' (p. 23).

Other focus areas identified for digital explorers included creating a clear vision and planning relevant resources for social media. Again this may be outside the remit of this role. However digital explorers could seek to influence digital tourists or learn from digital drivers.

Having addressed the focus areas, the next stage is the critical factors in social media marketing application, which make a difference to organisations and thus provides a platform from which to identify marketing outcomes from social media, as called for by Lamberton and Stephen (2016), and noted in Chapter

One as part of the rationale for this study. These areas were discovered in Chapter Seven and were classified into the relevant areas for the different typologies, in Figure 8.3.

It is important not to ignore or exclude the best application demonstrated by many organisations which was in place, as was found in Chapter Six (the online survey findings) and confirmed in Chapter Seven (the semi-structured interviews). Thus the best application should be maintained. These findings have been consolidated to formulate a decision tree in which the relevant learning areas have been highlighted, for future professional development, as shown in Figure 8.3. Thus this decision tree followed a pragmatist epistemology, with a solution-focused, practical empiricist approach (Robson and McCartan, 2015), as to the areas on which to focus best application. Furthermore, this has practical implications and can be used by organisations to: (i) evaluate current staff abilities; (ii) assess skills gaps in their organisations; (iii) identify training required; and (iv) identity recruitment requirements.

8.10 Strategic framework for social media application in organisations

This study has investigated social media marketing within organisations and subsequently identified critical success factors for social media application within organisations. Figure 8.3 provided a decision tree to identify focus areas of social media application and critical factors for different classifications of social media managers.

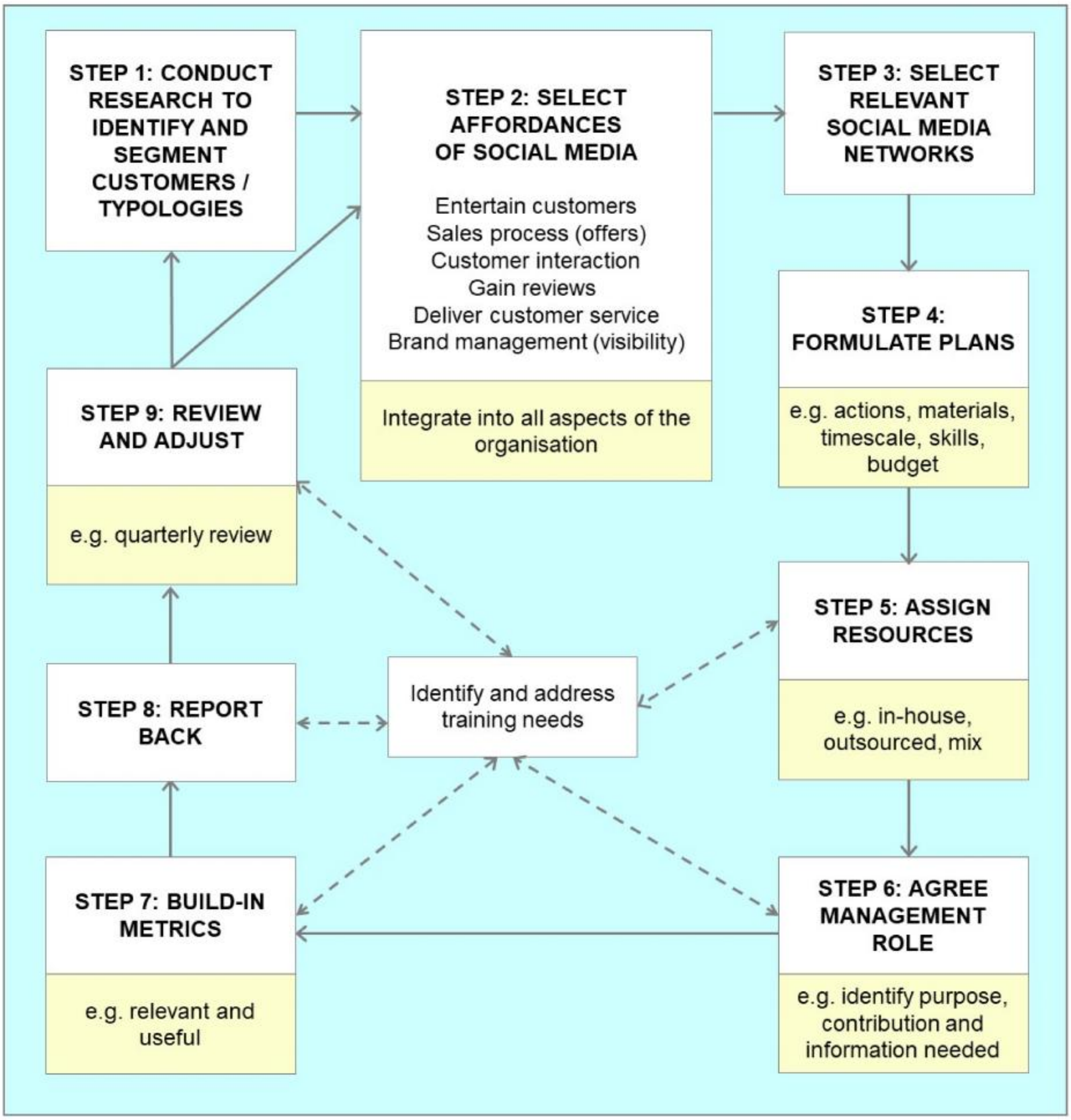
Further building on the empirical evidence presented in this study and the affordances identified, in line with a pragmatist epistemology, this section further recommends a practical strategic framework for social media application in organisations.

As a strategic framework this is founded on the following limited principles:

a) It should be realised that as a strategic framework all tactical variations of all possible permutations are not provided. This will be explored in further research in the form of an online tool which can offer greater functionality than a two-dimensional paper version which is provided in this section.
b) The framework is context-dependent and thus will not be applied in the same way for a business-to-business commercial organisation as for a business-to-consumer charity. Thus there is an opportunity to further develop the framework for specific sectors.

Based on these principles, the strategic framework for social media application in organisations is shown in Figure 8.4. The usage of the strategic framework for social media application in organisations is subsequently described in the following section.

Figure 8.4 Strategic framework for social media application in organisations



This section will discuss each of the steps.

Step 1: Conduct research to identity and segment customers / typologies
Chapter Two identified user typologies and although customer segmentation was identified as an affordance, in Research Phase One, only 122 of 428 respondents stated that they gained a benefit from social media in terms of customer segmentation. The participants in Research Phase Two demonstrated that whilst not all had conducted formal research before starting to use social media, they were aware of their customers. Therefore whilst the typologies may not be used, some participants had identified and segmented their customers to such depth that some had created personas (Hendriks and Peelen, 2013). Thus it is warranted that whilst organisations are aware of their customers, further research and segmentation may be required.

Step 2: Select affordances of social media
Once the customers have been identified and segmented, the next stage is to select the pertinent affordances of social media. This forms the basis of the organisation's social media strategy.

Based on the empirical evidence in this study, the critical factors in social media marketing application were identified as customer segmentation which was incorporated into step 1 and subsequently: (i) entertain customers; (ii) sales process (offers), (iii) customer interaction; (iv) gain reviews; (v) deliver customer service; and (vi) brand management (visibility). Whilst measuring social media was a critical factor, it is not an affordance or reason for using social media and is included in step 7, build-in metrics.

The selection of affordances ensures that the organisation focuses on recognised affordances and thus enables the organisation to drive value from social media (Zhang *et al.*, 2017), which was identified as a challenge in Chapter One. This further supports organisations to invest resources wisely and to use social media networks for relevant activities, rather than the opposite stance that some participants provided, where they tried all platforms, with no clear purpose.

These affordances are governed by the organisational sector, the customers and other context-dependent factors. To ensure that this is a manageable process and that the organisation has sufficient resources to address any potential challenges or critical incidents, it is likely that a smaller number of affordances should be selected when starting this process. Furthermore, organisations should integrate each affordance into every aspect of the organisation. As an example, if the selected affordance is ‘gain reviews’ this should be integrated into all aspects of the organisation, thus review feedback should be embedded into the website, in email signatures and in offline material.

Step 3: Select relevant social media networks

Based on the customer segments and the selected affordance(s), the relevant social media networks can be chosen, to integrate the affordance and the audience, thus achieving the desired purposes of social media marketing. This enables organisations to make plans and subsequently assign resources. In Research Phase Two, the participants demonstrated that they understood which social media networks were relevant to their customers and stakeholders.

Therefore no prescriptive guidelines are offered for social media network selection and as noted by Kaplan and Haenlein (2010), new social media networks may emerge which would instantly render this framework out-of-date.

Step 4: Formulate plans

At this stage, the next step is to formulate plans. The plans address the relevant activity on the social media networks, which meet the affordances of social media within the organisation. Whilst context-dependent upon the individual organisation, these plans are likely to include the following elements: (i) actions;

(ii) materials needed such as imagery, content, or software; (iii) timescale; (iv) skills required; and (v) budget.

Using the ’gain reviews’ purpose of social media as an example, the actions involve establishing a process to invite reviews and the materials element may consider whether the process is automated or manual, for example, using the Trustpilot system mentioned by several participants. The timescale may depend on the time required to install Trustpilot and whether data integration is needed. The skills may therefore involve data management and an ongoing budget for licensing an automated system.

Step 5: Assign resources

Assigning resources involves deciding whether work is conducted in-house, or outsourced to an agency, or whether a mix of different approaches is required. Marketing is a domain where the ‘gig economy’[13] is prevalent (Gillespie, 2017; Kelly®, 2017) and this may be a consideration for smaller organisations that cannot afford to recruit full-time permanent staff members.

Outsourcing varies where at one level there is a simple contract which is passed to a third party; to another level such as a potential joint venture or equity stake which is constructed with strategic partners. This is a process utilised by many major firms, such as the household brand Johnson and Johnson, which uses strategic partners to outsource the management of all customer queries in a digital environment (ATOS, 2017). Thus the concept should not be excluded.

Another solution is whether instead of outsourcing, internal staff are trained to manage the application of social media, which had been tackled by one participant in Research Phase Two. Therefore, training needs should be identified and addressed. This is recurring theme in steps 6, 7, 8 and 9.

[13] Work based on freelance or short-term contracts known as ‘gigs’.

Step 6: Agree management role

For the strategic framework for social media application in organisations to provide a pragmatist ‘coherent action’ (Ormerod, 2006, p. 901), it is necessary to agree the management role, in terms of managing and overseeing the application of social media. Moreover, as this study showed, many senior staff were digital immigrants and lacked the knowledge and qualifications of their younger peers, thus training at management level should be embedded into the plan. Therefore, there should be both discussion and agreement about the management role in terms of the purpose, contribution and useful information required.

Another factor is whether training is required for other members of the management team, such as board members or trustees. Several participants in Research Phase Two, mentioned that the senior team were less involved or did not understand social media. Therefore, agreeing the social media management role requires consideration of the wider scope of the organisation (Felix, Rauschnabel and Hinsch, 2017).

Step 7: Build-in metrics

Metrics have long been an issue in the domain of marketing (Day and Montgomery, 1999), and this may speak to the wider debate about marketing being an art or a science (Brown, 1996). Science requires precise facts and figures, which in social media could be manifested as metrics. The comprehension and application of social media metrics is a challenge that was identified in the literature (see for example: Kimmel and Kitchen, 2014). This was confirmed in this study, in particular for digital tourists (digital immigrants without formal marketing qualifications).

However, whilst metrics are contingent upon many factors - for example, the customer segment; the affordance; and the social media network - it is recommended that relevant and useful metrics, rather than vanity metrics are included where possible. This could be tied directly to specific results, as recognised by some participants.

Metrics is an area where further training may be required, to establish benchmarks and to provide training for the management team or board of directors or trustees.

Step 8: Report back

Once the metrics have been agreed and are built-into the strategic framework for social media application, step 7 involves reporting back. Organisations should strive to reach level 4 in the Social Media Affordances Maturity Scale, where metrics are captured, understood and presented to others. Furthermore, whether this action is implemented with a main board or a smaller team, it ensures the plans created (step 4) are being evaluated, which contributes to the strategic role clarity identified in Chapter Three.

Reporting was on the agenda for some participants in Research Phase Two, who had mechanisms in place, although this was context-dependent. Whilst the style of reports used is beyond the scope of this study, it is recognised that some organisations prefer one-page summaries, others select presentations, or visual reports to positively assist decision making (Hirsch, Seubert and Sohn, 2015). Regardless of the format, this step may require training to both produce and interpret the results to ensure that all members of the organisation are fluent in social media.

Step 9: Review and adjust

The loop continues as regular reviews should take place to evaluate whether the desired purpose is being achieved and is delivering the value required by the organisation. This review step is essential in social media management as the social media networks can change their terms and conditions which could result in the primary affordance no longer being available or accessible, thus the organisation may need to adjust either the affordance or social media network.

As a strategic framework, tactical instructions are omitted, although it is imagined that a quarterly review would be appropriate in a social media environment as the larger social media networks (e.g. Facebook, Twitter) provide four updates each year for shareholders, at which time most changes occur.

Thus this strategic framework for social media application in organisations, is supported by the empirical research and is therefore a useful method for organisations to better consider their application of social media within the context of their customer base and market sector. Furthermore this fully meets the research aim stated in Chapter One: 'To investigate social media marketing within organisations in order to identify critical success factors and develop a framework for social media application in organisations', within a pragmatist epistemology.

8.11 Limitations of the study

Following the last element in the guidelines for 'Good Reporting of A Mixed Methods Study (GRAMMS)' (O'Cathain, Murphy and Nicholl, 2008), the limitations of the study will be reviewed. Whilst this is step five in the GRAMMS guidelines, it was out of sequence, and thus to avoid duplication, this is presented in Chapter Nine, alongside the wider limitations of the study. The next section will however, present a critique of the GRAMMS guidelines.

8.12 Critique of the GRAMMS guidelines

According to Scriven (2007, p. 1) 'Evaluation is the process of determining merit, worth, or significance'. This is supported by a similar stance by Fitzpatrick et al., who defined evaluation as 'the identification, clarification, and the application of defensible criteria to determine an evaluation object's value (worth or merit) in relation to those criteria' (Fitzpatrick et al., 2011, p. 7). The central factor within evaluation concerns the notion of research quality, an issue considered by Fàbregues and Molina-Azorín (2017), who claimed that there were issues surrounding the worth of a study, although this was contextualised within the study or domain.

Having understood the nature of, and rationale for, evaluation, the next element is understanding its role within research and as stated by Chelimsky (2013, p. 35), there are three purposes of evaluation (i) to lead to new knowledge from studies; (ii) to improve agency capability, ameliorate management practice and problem solving, and (iii) to ensure accountability to foster continuous improvement.

Whilst the nature and role of evaluation have been considered, the process of evaluation in mixed-methods presented challenges as there is a lack of an agreed criteria for mixed-methods studies. Extant research indicated that this was for numerous reasons, for example, Sale and Brazil (2004), suggested that it was difficult to develop criteria where there was such variation in the methods and paradigms, and this observation resonated with Fàbregues and Molina-Azorín (2017, p. 2848), who stated the lack of criteria was due to ’the plurality of views within the mixed methods community’. It may be that finding a universal process of evaluating mixed-method is a Quixotic aim and unlikely to be realised. Furthermore, pragmatism, like mixed-methods, ‘acknowledges the plurality of knowledges’ (Cornish and Gillespie, 2009, p. 7).

However, seeking a criteria for evaluating a mixed-methods study, three approaches emerged: (i) methods approach, as recommended by Creswell and Plano Clark (2007, 2010, 2018), which followed core principles to embed rigour in the process; (ii) a timing of phases approach proposed by Schifferdecker and Reed (2009), although their procedure was similar, albeit extended, from the core principles by Creswell and Plano Clark (2007); and (iii) research process as suggested by O’Cathain, Murphy and Nicholl (2008), which was termed GRAMMS, as applied in this study.

One domain where significant research into the evaluation of mixed-methods studies has taken place, is healthcare. Driven by external funders seeking assurance of quality, as well as significant impacts on patient cohorts and the visibility of publicly reported findings, led O'Cathain, Murphy and Nicholl (2008), to review 75 mixed-methods studies in the domain of healthcare, to determine their merit. Their findings indicated that there was a lack of transparency in the reporting, thus it was difficult to fully assess the studies. Furthermore, where there was greater detail, it was found that the descriptions of the designs and methods were poor. A further issue was that the integration was unclear, yet integration is a critical component within a mixed-methods study and differentiates this methodology from separate studies. Based on their findings, GRAMMS was suggested as 'guidance' (O'Cathain, Murphy and Nicholl, 2008, p. 97), rather than a formal process. Therefore, as a framework, GRAMMS is broad instead of detailed and may thus lack the precise measurability found in a quantitative study (Bryman and Bell, 2011), although it provides greater depth than the approach from Lincoln and Guba (1985), which, whilst focused on qualitative methods only, included less prescriptive elements, such as seeking to understand how the researcher managed their own values.

Hence the GRAMMS protocol seeks to understand 'the justification for using a mixed-methods approach to the research question' (O'Cathain, Murphy and Nicholl, 2008, p. 97), from the commencement, to contextualise the setting and ensure this is a relevant approach. This encourages the investigator to contemplate the method and in this study was included within Chapter Four, Methodology, which was an apposite location to reflect upon the process. The structure of the GRAMMS guidance thus incorporates elements of reflexivity (Cameron *et al.*, 2013), which is a valuable aspect of research (Guillemin and Gillam, 2004; Mortari, 2015).

The second step required a description of 'the design in terms of the purpose, priority and sequence of methods' (O'Cathain, Murphy and Nicholl, 2008, p. 97). Whilst the authors of GRAMMS did not prescribe specific descriptions for mixed-methods research designs, these are found in extant literature and thus within mixed-methods, in 2007, Creswell and Plano Clark identified four main types of design; explanatory, exploratory, triangulation and embedded. Thus based on the research objectives of this study, explanatory mixed-methods sequential design was selected, as explicated in Chapter Four. Again this step required consideration as to why the study design was selected, in order that justification was provided. The additional factor within this step which was absent from other mixed-methods evaluation criteria (Dellinger and Leech, 2007; Pluye *et al.*, 2009), was explaining the sequence. Whilst Onwuegbuzie and Johnson (2006), incorporated sequential legitimation, this did not concern an explanation of the sequence, but verification as to whether the sequence was pertinent for the study. Thus the GRAMMS guidance provides an additional quality factor for the evaluation of mixed-methods studies.

Subsequently, the third step, to 'describe each method in terms of sampling, data collection and analysis' (O'Cathain, Murphy and Nicholl, 2008, p. 97), is a core and expected component in other methodologies to verify and validate the process. Thus less remarkable within an evaluation criteria.

However, the fourth step to 'describe where integration has occurred, how it has occurred and who has participated in it' (O'Cathain, Murphy and Nicholl, 2008, p. 97), is a defining constituent of mixed-methods studies (Creswell, Fetters and Ivankova, 2004; O'Cathain, Murphy and Nicholl, 2007; Fàbregues and Molina-Azorín, 2016), yet the process is not always explained within studies (Caracelli and Greene, 1993). Thus evaluation criteria for mixed-methods research should incorporate the issue of integration. In this study, the GRAMMS requirement for explicating the integration included the three signposts of where, what and how, offering a prescriptive process of describing integration.

The fifth step, to identify the limitations 'of one method associated with the presence of the other method' (O'Cathain, Murphy and Nicholl, 2008, p. 97), was out of sequence for this study. Within a pragmatist epistemology and following a clear sequence in terms of the methodology and the application of the evaluation criteria, this seemed to be the final conclusion, rather than an interim statement, thus this was relocated to be addressed in the final chapter. Identifying limitations before presenting the insights seemed untimely at this stage, therefore the guidance was modified to better fit the study. This may be tested in further research.

The sixth and final step was to ‘describe any insights gained from mixing or integrating methods’ (O’Cathain, Murphy and Nicholl, 2008, p. 97), however, this is a step in which the GRAMMS guidance lacked instruction as to how this was performed, thus a secondary method was required – a partial triangulation protocol approach (Schifferdecker and Reed, 2009; O’Cathain *et al.*, 2014; O’Cathain, 2017b), which comprised presentation of where the findings: (i) converged; (ii) complemented, explained or illuminated the other method; (iii) showed disagreement between the two study components; and (iv) where a theme was identified in one method but not another. Whilst this step is considered as the final element, this was rearranged as the penultimate step as this was a better fit within this study.

Thus the advantages of the GRAMMS guidance are that it is a process-driven approach which works effectively within an explanatory sequential design protocol and its practical nature is pertinent for a pragmatist epistemology. As this is designed for mixed-methods research, the second step required explanation of the sequence, which is not addressed in other evaluation methods. Moreover, the fourth step which involves explanation of the integration is an essential criterion that applies to all mixed-methods studies.

Reflecting on Chelimsky’s three purposes of evaluation (2013, p. 35), the GRAMMS guidance shines a light on the first purpose (i) to lead to new knowledge from studies, within the insights step. This illustrates where new knowledge has been gained, albeit this study adapted this stage by attaching the partial triangulation protocol (Schifferdecker and Reed, 2009; O’Cathain *et* *al.*, 2014). When applied to GRAMMS, the second purpose (ii) to improve agency capability and ameliorate management practice and problem solving, concerns transparency to indicate any issues, which was said to be missing in reviews of mixed-methods studies (O'Cathain, Murphy and Nicholl, 2008), thus this was embedded with the first step – justification of the method, the second step – research design and the third step – description of methods. Furthermore, as step six, describing insights, could contribute to amelioration of management practice and problem solving and thus subsequently foster continuous improvement, this is a good fit for a pragmatist epistemology.

The weaknesses of the GRAMMS guidance include the broad nature of some elements such as step six, describing the insights, which failed to indicate how this is achieved, thus requiring support from another method. Finally the ordering of the guidance has been adapted as this did not function as effectively in a traditional PhD study, which often requires a discussion before the limitations are presented. However, this may be a better fit within its home domain of healthcare, where limitations may include funding issues (O'Cathain, 2017a). Moreover, Chelimsky's third purpose of evaluation (2013), was (iii) to ensure accountability to foster continuous improvement, although is less relevant in this study as this is aimed at evaluations that are funded by government or other public bodies, which are accountable to the relevant stakeholders.

Evaluation has been described as 'the application of assisted sensemaking techniques' (Mark, Henry and Julnes, 2000, p. 326), and GRAMMS has enabled this study, within a pragmatist ontology and epistemology, to adopt a systematic approach (Morgan, 2014), to logically address each element. Furthermore, whilst pragmatism has been recognised as 'a tool for action' (Cornish and Gillespie, 2009, p. 7), this was facilitated by GRAMMS. The adapted version of GRAMMS as described in this section is thus presented in Table 8.5.

Table 8.5 Adapted version of Good Reporting of A Mixed Methods Study (GRAMMS) as approached in this study

STEP	GOOD REPORTING OF A MIXED METHODS STUDY (GRAMMS) PROTOCOL
1.	Describe the justification for using a mixed-methods approach to the research question.
2.	Describe the design in terms of the purpose, priority and sequence of methods.
3.	Describe each method in terms of sampling, data collection and analysis.
4.	Describe where integration has occurred, how it has occurred and who has participated in it.
5.	Describe any insights gained from mixing or integrating methods, presenting where the findings: (i) converged; (ii) complemented, explained or illuminated the other method; (iii) showed disagreement between the two study components; and (iv) where a theme was identified in one method but not another.
6.	Describe any limitation of one method associated with the presence of the other method.

Whilst the quality criteria of the Good Reporting of A Mixed Methods Study guidance (GRAMMS), was founded in and has been discussed in healthcare (O'Cathain, Murphy and Nicholl, 2008; Creswell *et al.*, 2011; Caffery, Martin-Khan and Wade, 2017), it has been employed in business research (Cameron *et al.*, 2013), and as a process approach has initiated debate for mixed-methods evaluation in other domains including: career development (Cameron, 2010), social science (Wharton, 2017), and in project management (Cameron, Sankaran and Scales, 2015). To date there is no evidence of GRAMMS being used in the domain of marketing, thus this study makes a contribution by applying and recommending GRAMMS in this field.

8.13 Chapter conclusions

This chapter has connected the research findings to the extant literature, and explicated the evidence gathered. The contribution of this chapter has been to present a summary of findings and ‘practical bearings’ (Peirce, 1905, p. 171), from this study, which fits with a pragmatist philosophy.

Furthermore, this chapter completed step six in the Good Reporting of A Mixed Methods Study (GRAMMS) guidelines (O’Cathain, Murphy and Nicholl, 2008), and described insights by illustrating where they converged, complemented, disagreed or appeared from the quantitative method to the qualitative method, and explained why there are different applications of social media marketing within organisations. As a characteristic of mixed methods research is to provide content visually, in order to highlight important information (Collins, Onwuegbuzie and Jiao, 2006; Lurie and Mason, 2007; Tashakkori and Teddlie, 2010), the findings were summarised in Table 8.1, which also highlighted the practical bearings from this study.

Additionally, this chapter has fulfilled the original Research Aim: ‘To investigate social media marketing within organisations in order to identify critical success factors and develop a framework for social media application in organisations’, and provided frameworks for organisations, which included:

- Stages towards the identification of critical factors in social media application
- Decision tree to identify focus areas of social media application and critical factors for different classifications of social media managers
- Strategic framework for social media application in organisations.

To conclude, as part of a pragmatist philosophy, the practical bearings (Ulrich, 2007), from this study have been identified and developed to provide utility for organisations as well as academe. The next and final chapter will conclude the study and consider the implications for practice and contributions to knowledge.

Chapter Nine: Conclusions

9.1 Chapter introduction

This chapter will draw conclusions from the research to highlight the findings from this study. The contribution to theory and implications for practice will subsequently be provided. Limitations, the final step in the GRAMMS protocol, the ‘Good Reporting of A Mixed Methods Study’ (O’Cathain, Murphy and Nicholl, 2008), is discussed. This is followed by methods to disseminate the work and areas of further research.

9.2 Findings

Chapter One provided the context, research aim and objectives which have been addressed in a logical manner in this study, which follows a systematic and pragmatist ontology and epistemology (Morgan, 2014). This chapter offered evidence for the need for such a study, listening to calls for research into the different ways social media is being used in practice (Lamberton and Stephen, 2016; Kannan and Li, 2017), thus ensuring the research questions were informed by the literature. The choice of social media within marketing management has still presents challenges for organisations (Zhang *et al.*, 2017).

Thus, this chapter will highlight the findings, rather than repeat material from the earlier chapters.

9.2.1 Scholarly review findings

No classification for different types of social media managers

The extant literature demonstrated that many researchers have considered the uses and gratification of social media for individuals based on generations or age ranges (Shao, 2009; Muntinga, Moorman and Smit, 2011; Whiting and

Williams, 2013; Luchman, Bergstrom and Krulikowski, 2014; Krishen *et al.*, 2016), and other scholars have explored the usage frequency and types of use (Kozinets, 1999; Mathwick, 2002; Li and Bernoff, 2008, 2011; Brandtzæg, 2010; Kilian, Hennigs and Langner, 2012; Lorenzo-Romero, Alarcon-del-Amo and Constantinides, 2012; Alarcon-Del-Amo, Gomez-Borja and Lorenzo-Romero, 2015; Bulut and Dogan, 2017). However, what was not discovered was whether there were different types of social media managers. Thus this was a gap in the literature and resulted in the development of the working typologies illustrated in Figure 8.1.

Digital literacy

Reviewing generational cohorts resulted in the recognition of another area of interest - digital literacy (Lankshear and Knobel, 2006; Ng, 2012; Prensky, 2006). Whilst exploring the full gamut of digital literacy and its subsequent concept digital competence was outside the scope of this study, the presence or absence of formal marketing qualifications was noted and subsequently considered in both empirical research phases.

Sampling myopia

Chapter Five explained the processes of the research within an explanatory sequential fixed design and a finding in this chapter was the conundrum or sampling myopia that exists with regards to random samples in online closed groups (Schonlau, Fricker and Elliot, 2002). This requires further debate and discussion to consider how traditional sampling methods apply to researchers within a computer-mediated survey environment.

9.2.2 Empirical research findings

Digital skills gaps

Connected to digital literacy, the empirical research identified that digital natives were more likely to have formal marketing qualifications than digital immigrants. Whilst this may be true in many sectors, there are recognised skills gaps in digital marketing (Waite and Perez-Vega, 2018), and this study has highlighted areas of further learning for digital immigrants and those without formal marketing qualifications, specifically in the area of measuring results and understanding metrics. This has practical bearings for organisations and education providers.

Social media affordances applied at varying levels of maturity

The critical success factors within organisations were justifiably warranted (Hildebrand, 2005; Ormerod, 2006; Scott and Briggs, 2009), within the empirical research, which asserted the following social media affordances for organisations: brand management, customer segmentation, customer service, interaction (engagement), entertainment, remuneration (offers), and sales cycle (testimonies and reviews). Two critical factors were confirmed: clear strategy and vision for social media management and measure results from social media. These were applied at varying levels of maturity, where at Level 0, the application was avoided and at Level 5, there was an integrated and agile application.

Gap between praxis and academe

This study intended to close the gap between practice and academia, yet in one area, this remains. New product development was found lacking in evidence in the empirical research and whilst acknowledged as an affordance of social media in the literature (Argyris and Monu, 2015; Rathore, Ilavarasan and Dwivedi, 2016), this was omitted from application within the organisations in this study, thus indicating a gap between praxis and academe.

9.3 Thesis contribution

The aim of this research was to investigate social media marketing within organisations in order to identify critical success factors and develop a framework for social media application in organisations. To achieve this, three research objectives were formulated:

1. To review the literature on social media and social media guidelines in order to identify critical success factors for organisations.

2. To conduct primary research in order to determine and evaluate current social media marketing application within organisations.
3. To recommend guidelines for social media application within organisations.

These objectives have all been answered and in the study several contributions have been made which are explained in this section.

9.3.1 Contributions to the body of knowledge

This thesis has contributed to the body of knowledge by providing a comprehensive account of the definitions surrounding social media. Whilst a working definition was proposed (social media is the facilitation of interactive, connected, marketing purposes at organisational, peer-to-peer and personal levels), this is an area requiring further debate to provide greater clarity in this domain, for both academe and practice, thus, this has opened the discussion (MacKenzie, 2003).

Further additions to the body of knowledge from the empirical evidence were the differences in social media application between generational cohorts and those with and without formal marketing qualifications. The empirical research highlighted that digital natives were more likely to have marketing qualifications than digital immigrants. Other areas of difference between the categories included the application of customer service, measuring results and managing social media interaction.

The qualitative semi-structured interviews in Research Phase Two revealed key themes in the application of social media within organisations:

i. Affordances: entertaining customers; providing offers; customer interaction; gaining reviews; delivering customer service; customer segmentation; and brand management.
ii. Social media strategy: adoption and development of strategy; and measuring social media.

iii. Digital differences.

The first two themes identified differences in how and why the participants in this study applied social media. Their application of entertaining customers; providing offers; customer interaction; gaining reviews; delivering customer service; customer segmentation; and brand management; showed differences between the generational cohorts (digital immigrants and digital natives) as well as those with and without formal marketing qualifications.

The approach to social media strategy, and specifically the adoption and development of strategy and measuring social media demonstrated variances. Combined with the last theme (iii) digital differences this contributed towards the formulation of a framework - stages towards the identification of critical factors in social media application.

These areas provide a better understanding of the phenomenon of social media marketing within organisations and generate opportunities for further research.

9.3.2 Contributions to theory

Development of affordances theory

Whilst the field of marketing adopts ‘judicious borrowing’ (Hackley, 2009a, p. 112), of theory from other fields, viewing social media within an organisational setting, through the lens of affordances theory based on the Gibsonian concept, has provided a different perspective. Affordances theory has constructed a theoretical bridge with a pragmatist ontology and epistemology, providing utility and warranted assertions (Scott and Briggs, 2009), thus was an apposite fit for this study. Moreover, the application and extension of the affordances threshold criteria (Evans *et al.*, 2017), led to assertions to be tested (Pappas, 2014), during the empirical research.

Furthermore, whilst affordances theory (Gibson, 1979) has been employed in several domains, the identification of social media affordances as applied to organisations is an under-explored area. Thus this study partly extends this theory to incorporate a decision tree to assess social media affordances to enable others to ascertain whether an item is a standard feature of the technology or an affordance.

Social Media Affordances Maturity Scale

The Social Media Affordances Maturity Scale, shown in Table 7.30, provides social media managers, regardless of qualifications or generational cohorts, with an indication as to their organisations' level of social media maturity. It encompassed the affordances and critical factors which were tested and confirmed in the empirical research. Whilst this is a new scale, it would benefit from further testing and it is likely that organisations will be at varying levels, for different elements of social media application.

9.3.3 Methodological contribution

There is a methodological contribution as the GRAMMS approach, the 'Good Reporting of A Mixed Methods Study' (O'Cathain, Murphy and Nicholl, 2008) has largely been adopted in its own domain, healthcare. At the time of writing, it had not been deployed in the field of marketing. Recognised by Creswell and Plano Clark in the latest edition of their textbook (2018), although not identified in an earlier version (Creswell and Plano Clark, 2007), this evaluation scheme is a useful addition to a pragmatist mixed-methods process in the domain of marketing.

9.4 Implications for practice

Working typologies for social media managers

The development of working typologies for those using social media in organisations (digital directors, digital tourists, digital drivers, digital explorers), is at an early stage, although this is a novel approach to classify those working in social media. Thus this can better frame training and other support which is required. This is a generative contribution that provides opportunities for validation in further research.

Social media affordances for organisations

The identification of affordances of social media for organisations has an implication for marketing managers, as this contributes towards the understanding of social media application within an organisational setting.

Strategic framework for social media application in organisations

The development of the strategic social media application framework provides organisations with a method for applying social media in a range of settings. This ensures that organisations invest their resources wisely and in the areas where they will gain most affordances, rather than adopting all social media networks without a clear focus. This has practical bearings for organisations, by facilitating earlier decisions in applying social media, to gain better outcomes of value (Lamberton and Stephen, 2016).

Education and training

One of the affordances which generated many conversations in Research Phase Two, was concern over reviews amongst those with no formal marketing qualifications who were unclear as how to manage customer-created content. Another area was managing online interaction. This was mainly centred around the classification of social media managers termed digital tourists, as the participants who did not manage social media interaction were digital immigrants, without formal marketing qualifications. The implication is that further education may be required for digital tourists who may be missing interaction opportunities across social media networks.

Additionally, digital tourists may be concerned or fearful about seeking digital qualifications and therefore educational and training establishments could target this demographic to promote specific courses.

9.5 Limitations

Concluding the Good Reporting of A Mixed Methods Study (GRAMMS) Protocol (O’Cathain, Murphy and Nicholl, 2008), the penultimate stage is to ‘describe any limitation of one method associated with the presence of the other method’ (p. 97) and thus this section will address the study limitations in order to conclude the GRAMMS process. Whilst this is not synchronised with the GRAMMS protocol, including limitations in this chapter avoids duplication as it can address both limitations of the study as well as other areas for consideration in future research.

The final stage: ‘Describe any insights gained from mixing or integrating methods’ (O’Cathain, Murphy and Nicholl, 2008, p. 97), was provided in Chapter Eight which following the reporting of the findings of the quantitative Research Phase One (Chapter Six) and qualitative Research Phase Two (Chapter Seven), was a more logical way to order the reporting and is a small adaptation to the methodology based on its application in a study.

9.5.1 Study design

The study was an explanatory mixed-methods sequential design, and this approach started with quantitative research followed by qualitative research. The alternative approach – an exploratory sequential design – would have commenced with a qualitative study that was succeeded by a quantitative study, which may have rendered different results. However, as this study sought to explain and integrate findings from the literature review rather than to explore a phenomenon, the question concerned not whether social media existed but rather how was it utilised and applied by organisations, hence the implementation of the explanatory sequential design. Furthermore, using this approach, the quantitative survey was designed to provide areas to investigate further within the qualitative semi-structured interviews and to add richness to the data. Whilst the findings were reported separately, the study was designed in order that each method should complement the other.

A further limitation is that using mixed-methods required more time to gather, administer and process two sets of data. The time-lapse between one method and the next could be considered as a limitation. However, using mixed-methods was essential to fully satisfy the research aim and investigate different application of social media marketing within organisations. The quantitative online survey explained *what,* whereas the qualitative semi-structured interviews illuminated *why*. The time-lapse allowed for the quantitative analysis to be conducted and to better inform the qualitative study.

9.5.2 The data

One issue is that the data collected in Research Phase One was purposive and thus cannot be generalised to the wider population. There may be further limitations and bias with the online data, as the information was provided on a self-report basis. Respondents may have purposefully or erroneously selected the wrong choice at times.

Additionally, respondents were not asked for their company details other than the sector and date founded. Thus, those not in an organisation could have falsified or mis-represented the answer to question two ('Does your organisation use social media for business purposes, such as communicating with customers?'). However, Donaldson and Grant-Vallone (2002) termed this as being mainly a bias issue with a mono-method (p. 257) and thus this is minimised with a mixed-methods approach.

Whilst the data was from closed online lists where consent to make contact with the respondents had been granted, and whilst the lists were 'live' and automatically updated, those responding may have had specific characteristics beyond the desired qualities of using social media for business purposes. For example, those responding could have been individuals with time to spare. However, the same pool of individuals was used for the qualitative survey and one participant had to re-arrange three times before the interview could take place, another was returning from a meeting and stopped the car to take the call, and another agreed to speak after work on a Friday evening. These were busy individuals, rather than those completing a survey because they had significant time available.

Due to the limitations of access to the data, the researcher had no control over when and how the survey was issued. Thus the facility of assessing the response waves via the dates and times that the surveys were completed, was of no great benefit.

Additional organisational demographics were not collected in Research Phase One, partly due to researcher error and partly due to a desire to maximise the potential responses as it was recognised that the response rate would be low. Thus the company names, size of organisation and locations of the headquarters were not collected. It may be that a wider range of countries is represented, which may further bias results due to cultural differences. There may be variations between organisation size and location, that remain unknown. These additional demographic elements may have been useful in the analysis.

In Research Phase Two, more digital immigrants responded and there were fewer digital natives who participated in the semi-structured interviews. However, whilst this research phase was inductive and not quantitatively focused, this could result in further bias.

Another limitation could be the mixed-mode approach offered for the interviews which provided the opportunity for a conversation in person, online or via telephone. There could be differences in how respondents answered based on the setting. Although the longest and shortest interviews both took place face-to-face [CONTENT REDACTED TO PRESERVE ANONYMITY OF PARTICIPANTS].

These limitations should be noted and considered when performing future research.

9.6 Areas for further research

This study presents several opportunities for further research. There are opportunities for additional research using the data collected in this study, to explore:

- Similarities in application of social media (the focus was on differences).
- A multi-level analysis considering different variables such as the sectors, job titles and ages of the organisations.

A social media affordances maturity scale was developed which could be further examined in later research to ascertain if the classifications are valid or require refinement.

This study proposed working typologies for those working in social media (digital directors, digital tourists, digital drivers, digital explorers) and future marketing researchers could focus on the verification of these clusters.

The strategic social media application framework could be applied in an online setting with interactive options to auto-fill responses and provide various options. As an experiment, the framework could be tested online to better understand its practical application.

The generational cohorts were problematised for the purposes of this research, which considered the binary digital native and digital immigrant categories. Future research could consider the liminal state of digital settlers.

The notion of digital competence was discussed and could be further explored at an organisation level. The UK government currently considers ability at a personal rather than a business level and research could identify where training within business is required.

Another area of potential research is the notion of a social media strategy design. The concept of social media strategy lacked clarity amongst participants and the development of a functional process which is straightforward to apply, may be useful for organisations.

9.7 Dissemination of work

One of the questions in Research Phase One (Q15) was whether the respondents would like to receive a copy of the survey results, thus a practical summary will be prepared and disseminated to the data managers. This supports the call to ensure academics and practitioners share their work (Kumar, Keller and Lemon, 2016).

Having adopted a traditional PhD path at the University of Derby, which is to conduct research and not submit articles for publication until after the PhD was confirmed, the researcher plans to identify relevant journals and seek publication. The study covers several domains, from marketing and social media, to education and organisations, thus providing scope for publication. It is therefore thought that this may be achieved within two years.

9.8 Chapter conclusions

This mixed-methods study responds to the debate concerning digital natives and digital immigrants (Murawski and Bick, 2017), it addresses the call for research into social media, in particular 'the work to close the academic–practitioner gap' (Lamberton and Stephen, 2016, p. 168), and the focus on organisations (Ngai, Tao and Moon, 2015), as the empirical data is based on the application of those working in organisations, rather than consumer usage of social media.

This research supports the agenda for a method that rather than encouraging organisations to 'adopt new technologies as they emerge' (Kannan and Li, 2017, p. 41) provides a strategic social media application framework for technology selection, in this case social media networks, which offers a pragmatist solution to this digital dilemma by providing a novel and process-driven approach that enables organisations to optimise resources by focusing on the affordances of social media.

Furthermore, the frameworks presented followed a 'what works' approach (Creswell *et al.*, 2011, p. 4), and are thus congruent with a pragmatist epistemology and ontology, where knowledge production has focused on solving practitioner problems (Hunt, 2007), and has therefore contributed to the management of marketing.

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Appendices

[CONTENT REDACTED TO PRESERVE ANONYMITY OF PARTICIPANTS]