

Enable, Engage and Evaluate: Introducing the 3E Social Media Strategy Canvas Based on the European Airline Industry

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Abstract. The strategic use of social media has increased in importance. However, there is a lack of theory to design and evaluate social media strategies. In a competitive environment, airlines need to excel on service, customer satisfaction and marketing. Social media could support those areas of business. This paper comprises the results of both a systematic literature review and case studies at European airlines. The literature study was based on 85 academic articles, regarding the prevalent approaches to social media strategies. The case studies were conducted within three North-western-European airlines in Germany, France and the Netherlands. As a result, a new conceptual framework and tool for creating social media strategies is created. Engagement, Evaluation and Enabling are its main concepts. The new theoretical framework is more complete and was derived from existing literature and case studies. The 3E Social Media Strategy Canvas can serve both as a decision-making tool and as a theoretical framework for comparison.

Keywords: Social media strategies · Facebook · Business model canvas · Policy · Engagement

1 Introduction

In recent years, social media channels such as Facebook, YouTube, Twitter and Instagram have increased in importance within the airline industry [1–3]. Since this is an information intensive sector, social media is predominantly used at airlines as a communication channel for providing customers with relevant information [4, 6]. One study found that airlines social media use is found to be heavily advertising focused [1]. Social media could also be important as a tool for customer service. The risks of not effectively addressing customers by social media are apparent. For example, United Airlines reputation was affected because one of their customers made a viral YouTube video [7]. The reason was that United

Airlines refused to compensate a musician whose 3,500 dollar guitar was broken. This example stresses the importance of managing business reputation on social media. Because social media could be useful to contribute to marketing, customer-satisfaction and service goals more knowledge is required regarding effective social media strategies. However, there is a lack of theory to underpin the design of social media strategies within companies [8]. In a highly competitive field such as the travel and hospitality sector it is of major importance to adapt to the needs of clients including their expectations regarding social media presence.

The main aim of this paper is to systematically combine important aspects of social media strategy into a practical tool for designing such strategies. As a result, the 3E Social Media Strategy Canvas is introduced in this article as a tool for organizations to design and revisit their social media campaigns. Therefore the main research question of this research is: How to design a social media strategy canvas as a tool to meet business and customer requirements? This research paper is designed to meet the dual objectives of engaged scholarship, thus producing relevant insights for both theory and practice [9]. A canvas tool could help to design, compare and revisit new and existing social media strategies in practice. Osterwalder and Pigneur [10] have showed with their Business Model Generation Canvas that practical tools can be developed from a theoretical background. The concepts of a social media canvas tool should be based on both theoretical and empirical insights. We derive key elements of a social media strategy from a literature review and construct a framework entitled the 3E Social Media Strategy Canvas. Furthermore, to support the design of a new canvas tool, interviews were conducted with three airlines in North-western-Europe.

The remainder of this article is structured as follows. First, the research method is shown and second, the theoretical background for key elements of social media strategy is presented. Third, the results of the qualitative interviews are presented in order to validate the key elements of social media strategy. Fourth, the key elements are used to design a framework for designing social media strategies in a discussion section. Finally the conclusions are drawn.

2 Research Method

The method consists of the following parts. First, there is a literature review that aims to find key elements of social media strategies. According to Webster and Watson [11]: “relevant literature is an essential feature of any academic project”. In order to have a systematic approach regarding the identification of key elements and concepts of social media strategy we follow the method of a systematic literature review [12]. The literature review was based on desk research using electronic scientific literature databases to which access is provided by academic library services including ISI Web of Science, Scopus, EBSCO INSPEC and EBSCO Business Source Elite. This multi-disciplinary set included the top journals of the field of information systems [13]. In order to include recent literature the articles had to be published between 2005 and 2016 at the time of selection. 85 papers were

selected of which 9 delivered key elements for this study (Table 1). Selection criteria were empirical evidence and being part of a series of elements. The case studies included three airline carriers in Europe.

The second part of the method is based on qualitative case studies [14]. Three case studies were conducted at airlines in Western-Europe. The selection criteria for the included cases were based on industry type, and European origin. The interviews do not strive to provide us with a complete evaluation of the industry nor a reliable view on the state of the field. The sample was relevant to the universe of the grounding of theory [15]. While a larger selection of cases would have contributed to presenting more generalizable claims, generalization of the entire population would still be problematic [16, 17]. Because of the limited amount of people working on social media strategies and since the homogeneous nature of this group only a few interviews per airline were conducted with social media managers and on-line sales and marketing assistants and with social media experts, totaling 9 interviews. The qualitative open interviews were held to test to what extent the key elements of social media strategy from literature were recognized and used in practice. The list of key elements of social media strategies (Table 1) was used as a guideline for the topics of the framework of the interviews. Furthermore, the interviews were semi-structured. For its qualitative cause we were also open for new, unexpected elements, concepts and motivations that could be present in practice but were not yet found in literature. Next to the interviews, the actual airlines social media activities were observed and analyzed to obtain objective comparative data.

The third part of the method was the design of a canvas tool that was based on thorough analysis of both results from literature and practice. Based on systematic comparison of the results the social media canvas tool was designed. The design of the canvas is partly a creative task. Other designs are possible but we have created multiple designs and tested them in practice with actual users. The canvas tool design is an initial version based on three iterations of the design. We used the hypothesis-driven experimentalism for market exploration testing to derive the canvas tool [70].

3 Theoretical Background

Table 1 presents the key elements of social media strategies as found in literature. After analysis we have defined three overarching concepts that comprise the elements: Enable, Engage and Evaluate. These categories were assigned by sorting processes. Based on these three concepts we will highlight relevant findings from literature in the following sections.

3.1 Enable

We have recognized various key elements of social media strategy and combined them into three concepts. The first concept of ‘Enable’ is about preparing and setting up social media activities and campaigns. Policies intend to provide

Table 1. Key elements of social media strategy in literature

Category enable	Category engage	Category evaluate	References
Resources	Target audience	Monitoring	[50]
	SM choice		
	Goals		
	Goals	Monitoring	[42]
	Activity plan		
	Target audience	Monitoring	[4]
	SM choice		
Policies resources	Target audience	Monitoring	[22]
	Goals		
	Activity plan		
Policies employ- ees/consultants	Sharing content	Evaluation	[20]
	Relationships		
	Users		
	Platforms		
	Goals		
Development	Relationships		[38]
	Conversations		
	Users		
Policies	Content	Monitoring	[18]
	Target audience		
	SM choice		
	Goals		
	Activity plan		
Partners staff investment	Messages		[34]
	Magnet		
	Paths		
	Customers		
Guidelines employees technology investments	Engagement	Learn listen	[19]
	SM types		
	Customers		

guidelines for employees usage of social media [26,27] by directing them in what they can and cannot do at the organizational level [24]. However, the companies should be careful not to overly constrain their employees and limit their

personal freedom of expression [28]. Social media policies often address ethical issues [28]. This does not differ from the responsibilities a company has beyond social media, which is why these policies tend to rely on the common rules and regulations valid for the entire organization [24].

Partners is a topic of social media strategy that includes both internal and external social media resources. Internal partners are employees that are responsible for social media [18–20]; external partners are professional consultants that support organizations with social media use [20]. It is important that an organization clearly defines responsibilities [20]. All social media members should have both IT and communication skills and should be able to develop relationships with customers [19, 20]. Several authors agree that in order to successfully deploy social media, the companies need to provide specific training and education for the employees allocated to this task [19, 29–35]. Furthermore, it is important to define specific tasks properly among the staff, so that each employee plays a certain role in maintaining the social media sites [20, 23].

Social media investments include all financial costs with regard to the social media use of an organization [18, 20, 22, 36]. Resources include the financial part, namely the budget for implementing such a strategy with all related technological expenses such as Facebook Ads and tool subscriptions, as well as the allocation of the dedicated time and staff [35–37]. In the present paper resources contain expertise or training that is needed, quality control of messages [18] and necessary technology [19].

3.2 Engage

The second concept ‘Engage’ comprises of all those aspects and key elements of social media strategy about reaching out, getting attention of certain target audiences and interacting with them. Schaffer [41] recently mentioned eleven essential elements of social media strategies and ten of these elements can be placed within engagement.

For a successful social media presence, it is moreover essential to define your target audience in your social media strategy [22, 25, 50, 51, 61, 62]. In order to design the social media presence in a way that different types of customers are addressed, it is important to reconsider different group characteristics [18, 20, 38]. Gaining a significant reach and attracting enough attention among the selected target audience is the foundation for creating value with social media [3, 63]. Social media is primarily used for approaching customers, but a reason to be present might also be to interact with suppliers or vendors of the firm [64]. Another option for a target audience is to reach out and try to address the key opinion leaders on social media platforms [36, 63].

Goals build the basis for a social media strategy. Therefore, companies that deploy social media strategies also need to determine their ideal objectives [23, 39, 50, 51]. These goals need to be measurable [42] so that the strategy can be evaluated and constantly adapted if necessary. The determination of these goals needs to be completed before entering in the social media business to guarantee a successful implementation [52]. To define the goals for utilizing social media

corporately, an alignment between these objectives and the overall business goal is required [20, 21, 53]. There should be specific attention for engagement and interaction goals [46, 48, 57]. Integrating social media into the consumption and purchase experience for customers rather than utilizing the sites as pure marketing channels is found to be advantageous for the companies [59].

Various authors point out that the content published on social media is one of the core elements of a strategy [22, 30, 37, 45, 46]. Othman et al. [42] propose that companies should develop an individual content strategy for the social media presence. Primarily, the content has to be relevant [25, 47]. The social media content should fit the company culture and should be of significant quality [3, 47, 48]. Organizations need to design a recognizable social media presence that contains interesting information or objects (e.g. videos, pictures, sounds) in order to enhance customer engagement [20, 34]. Organizations can start discussions, develop games, or present campaigns where customers can get involved in [38]. Furthermore it is important that organizations see the relation with their social media users as a friendship based on trust. Aggressive advertising and other disturbing activities may lead to a lower engagement of users [19, 38].

Social media channels differ in appropriateness and effectiveness for disparate or complementary communication goals [34, 60]. There are differences in the extent to which users can see that other users exist, where they are, and if they are available. Social media channels differ also in the amount to which they share such information with their users. Furthermore the popularity of social media channels differs between countries [19]. Organizations need to understand these connections [20] in order to reach the highest amount of customers [18]. First an overview of the existing platforms is provided. Facebook, Twitter and YouTube are regularly named the most popular social media channels [5, 6, 37, 62], with Facebook being the worlds dominating platform by the number of users [3].

An action plan for a social media strategy can imply the creation of a schedule for corporate posts [39, 48, 49]. This schedule might include information about the organizations social media activity concerning the specific time of the day, the frequency and the subject of the post. The regularity of the postings is important for finding a right balance [57]. In order to foster engagement, posting questions on the platforms is likely to create awareness and a sense of membership among users [3, 57]. The questions tend to support the interaction on the social networking site. However, it is found that companies still do not use the full potential of the platforms [57]. There are also social media publishing tools available for the development of an activity plan [45].

3.3 Evaluate

The third concept ‘Evaluate’ comprises of various ways of using data, statistics and insights to learn, adapt and measure whether the companys activities on social media are delivering desired effects. The literature largely agrees on the importance of monitoring the social media activities for a successful social media strategy [3, 20, 43, 44, 46, 47, 52, 55, 65, 66]. The outcome of monitoring social

media platforms, namely the vast quantities of data, is considered equally as beneficial as a thorough marketing research [30]. Several authors agree that listening to their audience is an essential part of operating social media strategically [19, 25, 26, 30, 39, 40, 42–44]. With listening to the customers voice, the organizations are more likely to gain insights into their preferences and needs [25, 43]. Companies that fail to carefully monitor their social media channels lose a significant amount of valuable insights from the market. Therefore, clearly monitoring the buzz is important for companies operating social media platforms for it can lead to a better understanding of the consumer behavior and feelings of the mood in the market [44]. The outcome of the monitoring process can moreover aid in the creation of customized offerings for the users [66]. With sufficient information about the potential customer, a company is able to adapt their advertisements to the individual needs and therewith increase the likeliness of attracting the followers attention. Measuring the success of a social media strategy can more specifically occur through monitoring the amount of likes, posts or retweets on companies social media sites [4]. These structured metrics can provide a company with a decent overview of the value of their activities. The process of monitoring can be done with the aid of available monitoring tools [26, 43]. Evaluation of return is the final important aspect of social media as indicated in literature. Organizations have two possibilities to measure the success of social media use, namely key performance indicators and financial returns [18]. Performance indicators could include simple metrics such as likes, shares, retweets or followers [18, 20], whereas financial returns focus on pure monetary gains. To measure return, there could be measurable indicators such as increase in website traffic, customer satisfaction, and so on. Evaluating the results of social media use helps to estimate to what extent social media goals are reached and to adjust the social media strategy in case of weaknesses [18].

4 Results

This section will show the interview results within the three theoretical concepts given above. First, it was essential to investigate whether the airlines were familiar with the elements of a social media strategy and to what extent they were integrated into their social media operations. Therefore, the interview framework was constructed in such a way that all elements of a social media strategy supported by the literature research were present (see Table 1).

Thereby, it became apparent how the airlines included these elements in their approaches. The interviews were analysed according the theory of Miles and Huberman [67]. In the case the participant provided a positive answer to a question, they are classified as aware of that element, if not they are classified as unaware (i.e. + for aware, – for unaware). When the answers were more reflective they were classified as aware but not yet implemented (+/–). Table 2 summarizes the airlines comprehension of the elements of a social media strategy defined in the literature review and after that all concepts are described for all three airlines.

Table 2. Comprehensions of social media strategies in the studied cases

Elements	Airline 1	Airline 2	Airline 3
Enable	+/-	+/-	+/-
Engage	+	+/-	+
Evaluate	+	-	+

4.1 Airline 1

Enable. Airline 1 identifies social media as an instrument for customer retention and therefore tries to respond to all customer questions and also react to online given feedback. The goal of Airline 1 is to expand their social media operations in such a way that the networks will eventually serve as service channels for the customers. Airline 1 controls the usage of social networking sites with several rules summarized in their social media policy. This policy consists of the manner in which the employees are advised to approach their followers, the principles they have to consider before publishing content on the sites and the actions they are supposed to take in case uncontrollable online behavior occurs. The usage policies of Airline 1 essentially consist of guidelines for the employees behavior on their social networking sites. An intern is also taking part in the social media activities and decision-making next to the responsible employee.

Engage. Consumer engagement is key at Airline 1. It developed their strategy from being purely advertising focused to a more interactive strategy. There are monthly meetings that discuss the overall plans and content for the upcoming weeks. Additionally, the spontaneous social media actions appear to be scheduled as well, such as events, press news/releases, job vacancies and offerings. A clear goal of airline 1 is: “For the future we plan on increasing our social media activities regarding CRM in order to guarantee the customers and optimal 24/7 support service”. The airline plans on significantly increasing their response rate and, thereby, improving the engagement of their followers. They focus on users of age 18–35, thus mainly the young adults. Airline 1 indicates that social media has a high significance for their organization. The interviewee indicated: “We fill [our Facebook] page on a daily basis with interesting content regarding the topics flying and traveling and we act as a direct contact person in case of questions and problems to our fans. Through our social media channels we build a relationship with our fans and respectively potential customers and generate direct feedback this way.” The airline takes their differing purposes into account when deciding about the content that is to be published. This particularity shows the separate attention that the content of their strategic social media operation receives. Airline 1 is also very explicit about the content they post on their social networking sites: “[...] there is content that is regularly posted, e.g. content about price campaigns and events [...] and [additionally] special content is created in order to encourage fans to interact and play a part in our conversations [...] such as games, competitions or [we] ask our fans questions.”

Evaluate. In monthly meetings Airline 1 discusses the topics and major activities that will be posted to the social media platforms of the airline. Regarding the frequency of their posts, the interviewee provided the information in another part of the interview and mentioned that they fill the sites on a daily basis. Airline 1 puts the focus on the interaction with the customers. Airline 1 is moreover aware of the importance of monitoring the online activities. They monitor the effectiveness of their social media presence with the aid of the Facebook statistics and an additional monitoring tool. Airline 1 utilizes social media for their Customer Relationship Management (CRM) next to the advertising focused usage.

4.2 Airline 2

Enable. Since Airline 2 only established their online presence a year ago, they have yet to reach their desired capabilities in this division. Airline 2 aims to expand its social media team in the near future. The outcome of the question concerning the allocation of required resources shows that Airline 2 do not have a separate department or employees that work on social media full time. The social media operations are done by both the online marketing department and the website management department. Furthermore, the employees responsible for this division have responsibilities beyond social media and can, thus, not completely engage their time and efforts into the social media operations. Therefore, in total, one person is responsible for the social media operations at Airline 2.

Engage. Airline 2 targets on a B2C and B2B audience. Hence, Airline 2 does not only wish to appeal to potential customers of their flight tickets, but also to other industry members, such as suppliers. So far, there is no strategic planning involved in the one-year old social media presence. At the time of research Airline 2 is very active on social media. Compared to Airline 1 they have almost double amount of comments and surpasses their numbers of shares by more than 15 times, even though they did not mention any strategic concepts or purposes for their social media. The post with the highest number of likes included a hint about an ending competition, in which users were able to win two flight tickets. The second highest amount of likes received a post including a question towards the online community, asking them about their guesses regarding a following football match. Airline 2 is the ‘smaller’ airline in number of followers and likes on social media, but it catches more attention with their posts than Airline 1.

Evaluate. At this point there was no clear evaluation at Airline 2. It appears to skip the “Plan” stage and directly move to the “Do” stage, with defining their targets, choosing a social media platform and allocating resources, and, hence, does not consider following up and adapting their operations with evaluation.

4.3 Airline 3

Enable. Airline 3 won various prizes for their use of social media. Their social media cases are used by other companies to get inspired. The main pillars of the social media strategy of Airline 3 are service, reputation, engagement and commerce. Service is key because that is the reason that people follow us. Airline 3 has formed specific social media teams. For example, they have 4 editors within the communication department who are responsible for the engagement goals. The e-commerce department is responsible for both service and commerce purposes of social media. On top of that they have specific agents for webcare to answer questions of clients. Furthermore, Airline 3 frequently hires agencies to help them with creating visual content for specific campaigns. As these examples make clear, Airline 3 has assigned significant resources for social media tasks. Airline 3 says that they do not target for one target audience but let this depend on their specific social media campaigns.

Engage. Airline 3 has shown advanced ways of engaging with their customers such as interactive content and attractive campaigns. They have even linked social media relationships to their internal customer relationship systems (such as Salesforce) to track the individual customer experiences. Because of service purposes it matters whether: a customer that has lost its suitcase six times making it a different discussion than when it is the first time an issue with his lost suitcase. Furthermore Airline 3 is taking social media monitoring serious for continuous improvement of the organization: we really try to retrieve a top 10 of complaints and improve processes in our organization.

Evaluate. Airline 3 is stating that they are capable of getting quite a positive return on their investments: We are easily capable to earn back our investments. Because of the highly advanced targeting and social advertising capabilities of social media they can target on specific niche markets. As a result they have been successfully selling seats in planes that they were not capable of selling before: “you see conversion rates increase as high as 900 percent”. As Table 2 makes clear, Airline 3 showed attention to most key concepts from the social media strategy. Furthermore, they have been in the opportunity to assign significant resources (both staff and budget) to execute their social media plans.

5 Analysis

Based on careful analysis of the results and the structured literature study the following design is proposed for a Social Media Canvas as a new business tool to design social media strategies in Fig. 1. Following Osterwalder and Peigneur [10] we split content and engagement on the one hand and channel choice on the other hand. The canvas integrates the key elements of social media strategy from the findings of this research. It can help companies such as airline carriers to revisit and design their social media strategies during brainstorm meetings and

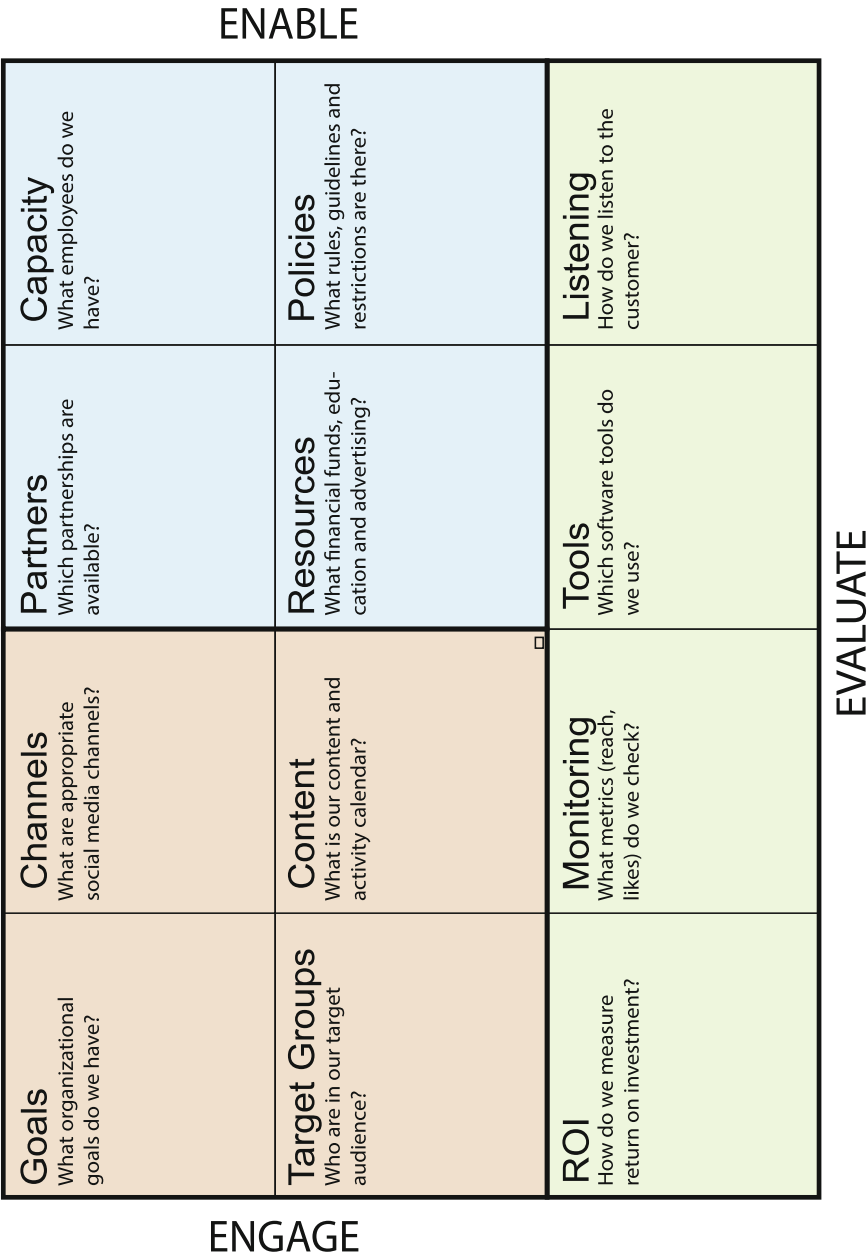


Fig. 1. 3E social media strategy canvas

decision-making processes. As the case results show, alignment between business goals and social media goals can be improved. As mentioned in theory the social media seem very agile and difficult to plan [48]. Therefore, we design the goals and activity planning close to each other to ensure more alignment. Although the value of social media is being recognized, allocating staff and partner capacity seems problematic. In regard to channel choice, all three airlines focus on using Facebook as their primary channel but other channels could ask for other activities. The capability seems in all three organizations not high enough and as theory boasts, internally oriented [30]. Searching for strategic partners for social media is not yet on the agenda. At the first airline some clear policies are issued but at the other airlines there are none or in the third case none to be clearly seen. Palmer [21], Vaast and Kaganer [24] and Effing [18] state that clear policies are essential. Lehmkuhl et al. [66] emphasize that strategy should also comprehend financial resources and investments. In practice we do not see much attention for this at the three airline cases. The qualitative monitoring and evaluation is done at two airlines but that does not seem to imply the financial revenue which is not mentioned in any case. Berthon et al., [19] and Effing [18] show that investments and revenue on investment should be part of the strategic social media cycle. In practice the quantitative part is mainly number of hits and number of clicks but not shown in ROI.

6 Conclusions

This paper delivered a canvas tool based upon a structural theoretical study to structure social media strategy in the future. The tool is valuable to have a more structured approach to discussion about these social media strategy topics and can be used to write down conclusions and ideas from brainstorm sessions. Future studies should indicate whether this canvas helps companies in developing effective social media strategies. This canvas is important because there is a gap between theory and practice of social media strategy, especially on evaluation and enabling that can be addressed now. It is more complete than previous models in literature and more specific. Yet there remains the assumption that having a social media strategy created by the 3E Social Media Strategy Canvas will deliver more effective outcomes or return on investment. More research is necessary to find out whether the strategic approach will have better results for companies. We encourage other researchers to use this canvas in empirical research. This initial version does not aim to deliver a final layout. Our canvas can help organizations to make their own decisions regarding various aspects of the social media strategy.

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