



The Social media Consumer Report

A definitive look at why people follow, engage, buy, and break up with brands on social media

Ue need to talk

No matter what industry you're in, you're in the relationship business.

And modern relationships between brands and consumers are created, scaled, and realized on social media.

But these relationships are on thin ice.

How do we know? Well, we did a little survey.



Of the people who follow brands on social media...

63%

recognize that advertising is what keeps social media free, but 59% think there is too much of it

52%

are exhausted by self-promotional brand content

1 in 3

would prefer if there was no brand content at all

Instead of merely being tolerated (or even resented), imagine the relationships your business could create if your content was actually enjoyed on social media.

Gold, right?

Like any relationship in crisis, fixing this will require a long, hard look in the mirror. Some blunt facts delivered with tough love. And of course some really, really good advice.

Lucky for you, this report has exactly that.

Where are marketers

We believe all good relationships follow the same trajectory:

Awareness Relevance Significance





Unfortunately, it's easy to fall into bad habits that weaken (or even damage) the relationships your brand has with consumers at each stage along the way.

Awareness

Awareness is discovering who your audience is and understanding what they truly want and need.

Where marketers go wrong:

Making assumptions about your audience on social—who they are, how they behave, and what they want. Or worse, not even knowing these things to start.

2 Relevance

Relevance is when customers become invested in you—and you in them.

Where marketers go wrong:

Treating social media like a giant marketing megaphone instead of adding value to people's experience.

Significance

Significance is when a mutual exchange of value happens because of the trust you've built.

Where marketers go wrong:

Focusing too much on the point of purchase and not on what happens afterwards.

So how do we fix this?



Nobody needs to read another marketing report about what other marketers are doing.

This industry can be a bit of an echo chamber (one we've gotten caught in too). We spend a lot of time surveying, interviewing, and talking to other marketers about how marketing works—and not nearly enough time talking to everyday people about how they feel about marketing.

To fix our relationship with consumers, we need to better understand what they want and what they don't want. We need to understand what's relevant to them and what's not. And we need to figure out what actually helps build the awareness, relevance, and significance we're after.

We can't just keep talking among ourselves to address our own issues. We need to go out and talk to people. And really **listen** to them.

So that's exactly what we did.

Methodology

In collaboration with <u>Critical Truth</u>, over a span of two weeks in December of 2023, we surveyed 6,026 people aged 18–64 from the USA, Canada, United Kingdom, and Australia. Our respondents consisted of people who follow brands on social media and say social media has at least some influence on their purchase decisions.

We also evaluated their potential commercial value by how frequently they buy because of social media, and how much they say a brand's presence on social media influences their decision making.

We categorized respondents in two different ways to highlight their varying level of commercial potential:

Active Shoppers

Consumers who frequently buy because of social media, and who say a brand's presence on social has a large influence on their decision making.

Casual Followers

Consumers who don't frequently buy because of social media, and who say a brand's presence on social media doesn't have as much influence on their buying decisions.

We asked them:

- What brand behaviors they do or don't like
- Their beliefs about the social media landscape
- Why they follow brands or share their content
- How they behaviorally react to paid, organic, and shared posts

What's in this report? Three key themes

Sins & virtues



What brands get wrong, how to get it right, and what consumers believe about social media

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Building a highvalue following



The relationship between followers and commercial intent, and how to get more valuable followers

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Paid vs. earned vs. shared



Which type of exposure is most impactful at each stage of the buying journey

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Sins and Virtues

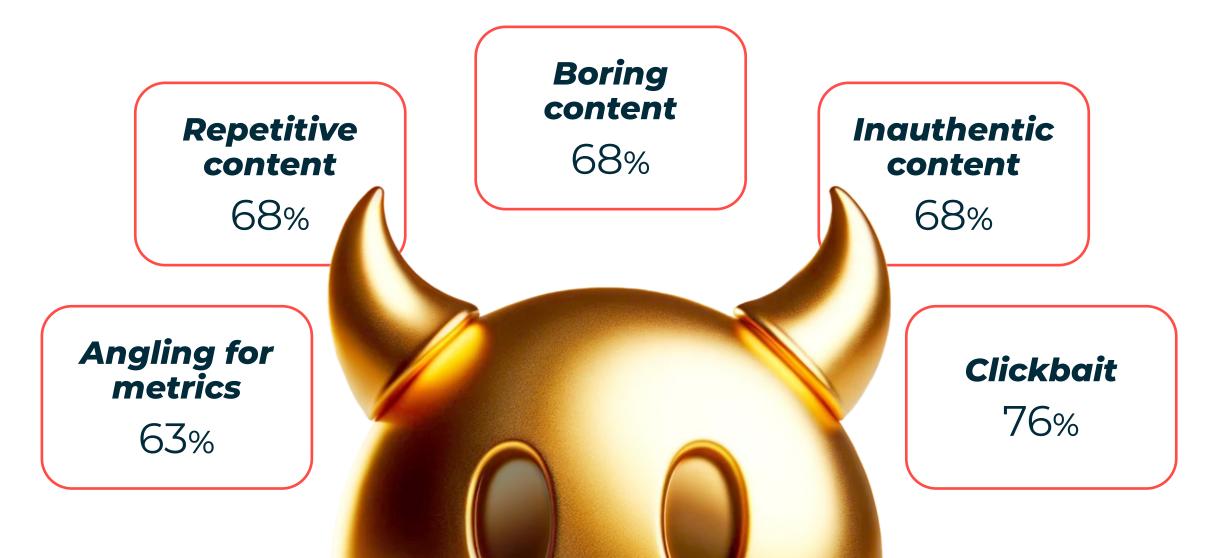
What brands get wrong on social media, and how to build better relationships by getting it right

We've all seen brands do boring, cringeworthy, and misleading things on social media—but when they miss the mark, is it actually detrimental or just annoying?

We asked what content is most likely to get you **unfollowed** and/or **hidden** by everyday consumers. Here's what we found.

The five worst sins that brands can commit on social media

What has caused consumers to unfollow or hide a brand in the last 12 months?





Brand sins

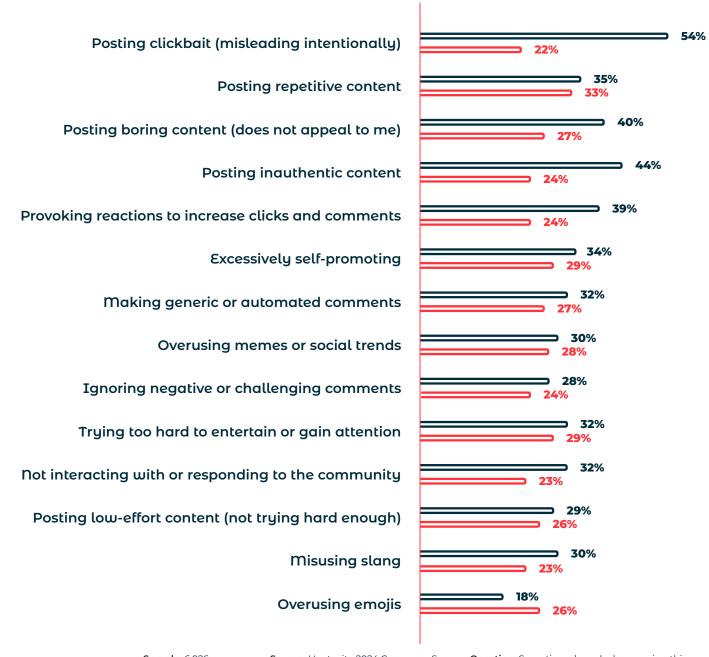
Things brands do that turn customers off

% Agreement

Unfollow D

Hide D

What's worse is that beyond getting you merely hidden, these top five sins are actually far more likely to get you straight-up unfollowed—not a good look when our survey also found there is a clear connection between followers and intent to purchase. (More on that later.)



If that wasn't warning enough, **Active Shoppers** (those most likely to actually purchase based on something they saw from a brand on social media) will punish you more frequently for the sins that would otherwise be most forgivable.

For example, overusing emojis is the most forgivable sin, but Active Shoppers are 7% more likely to punish you for it compared to Casual Followers. Even harsher is their likelihood to unfollow or hide your brand based on misusing slang—Active Shoppers are 11% more likely to punish you for it compared to Casual Followers.

Look, we get it. Many of these things happen for perfectly excusable reasons.



Marketers **post repetitive content** to save time when their backs are against tight deadlines.



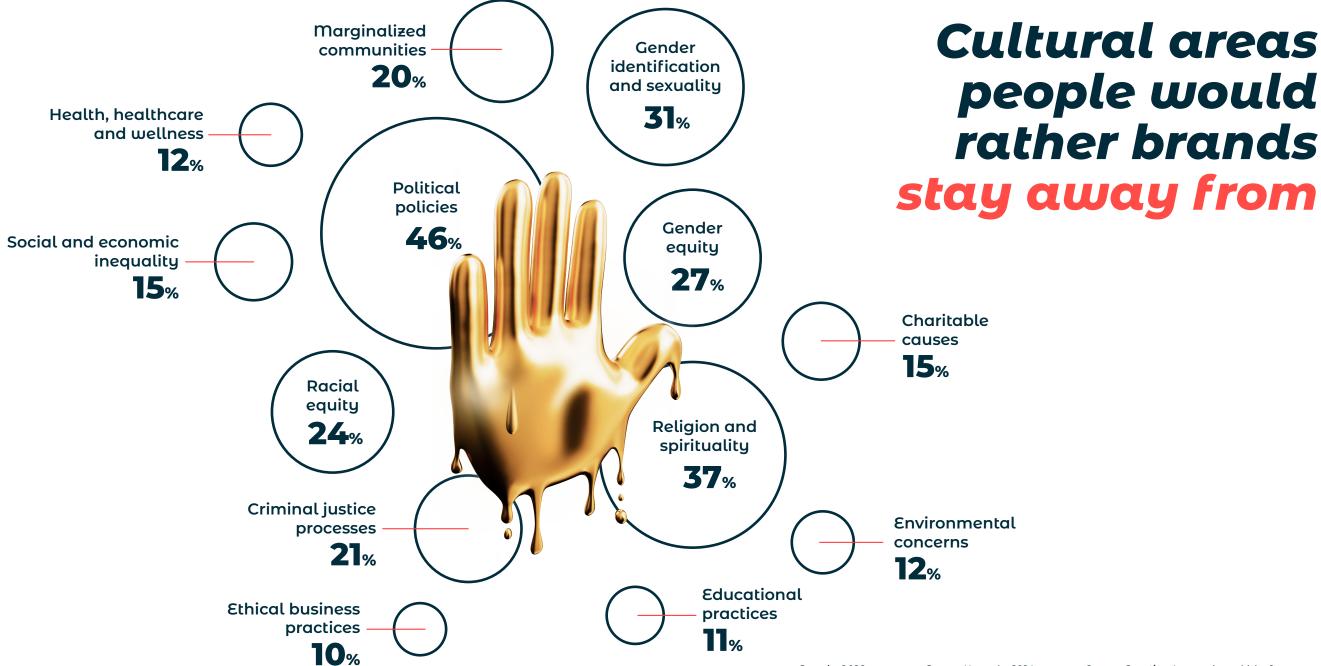
They post **clickbait** to hit quarterly revenue targets and make up for lagging sales.



They **angle for metrics** to meet the demands of bosses who are more concerned about short-term engagement than they are about the long-term health of the brands they manage.

But if you're one of the many, many marketers (69% of them to be exact, according to our <u>Social Trends 2024 survey</u>) who are using engagement as the primary metric to demonstrate the ROI of social media... you better be giving people content they actually want to engage with.

The truest test for your content will always be your audience's sustained reaction to it over time. Is it reaching the right people? Is it growing your community? Does it fit with the product or service you're selling? Because, after all, we are marketers. And these are fundamental questions you—as a marketer—need to be asking yourself.



"Our society has reorientated itself to the present moment," writes media theorist and documentarian Douglas Rushkoff. "Everything is live, real time, and always-on. It's not a mere speeding up... It's more of a diminishment of anything that isn't happening right now. So much so that we are beginning to dismiss anything that is not happening right now—and the onslaught of everything that supposedly is."

Marketing is no exception to this phenomenon. To stay relevant and keep pace with a shifting culture, we assume that our communications must be always on, and that we have to be part of every cultural conversation going on at any given moment—despite whether or not what we sell is even remotely related, and despite what our customers actually think and feel about it.

In fact, 64% of consumers around the world will buy or boycott a brand solely because of its position on a social or political issue, according to Edelman. Consumers are more attuned to marketing disguised as altruism than marketers give them credit for. From greenwashing to wokewashing, real people recognize fake when they see it. Especially on social media. And they'll punish you for it by taking their attention and money elsewhere.

Real people recognize fake when they see it

Our survey found that the safest spaces for brands include charitable causes, environmental concerns, educational practices, health/wellness, and ethical business practices.

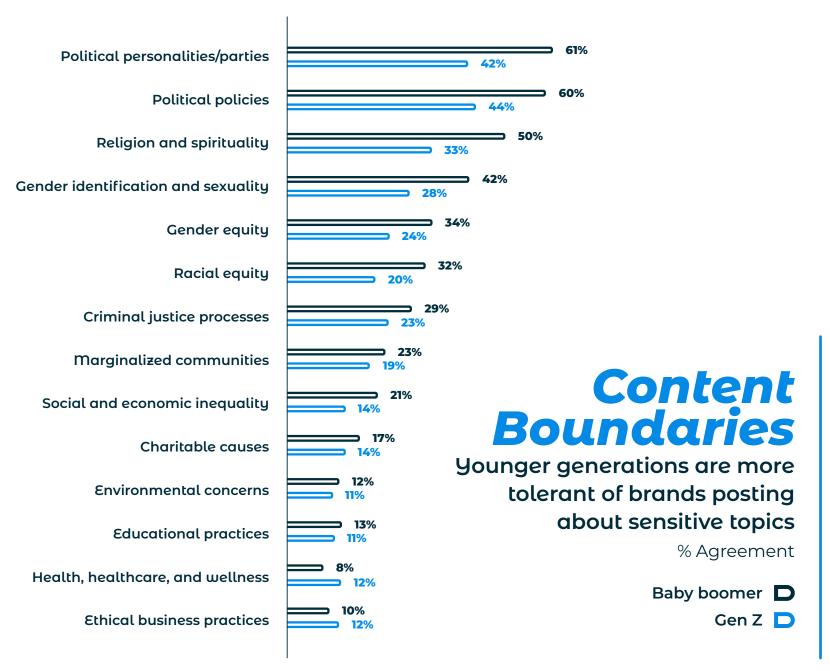
But don't you dare wade into these topics unless you've got sound business practices to back them up.

Committed to the environment? Check your supply chain for inefficiencies. Concerned about health and wellness? Run an employee wellbeing survey. You get it. Anything less opens you up to the court of public opinion in the comments section (and rightfully so).

Younger generations are more welcoming (kinda)

We're seeing an emerging generational shift in receptiveness to brands getting involved in more sensitive cultural conversations. Almost across the board, younger generations are more tolerant of brands engaging in conversations about politics, religion, gender equity, and racial equity.

There are a few big asterisks to add here, however. Four out of 10 Gen Zers would still prefer that brands steer clear of topics like politics. And one in three would still prefer that they stay out of religion, gender, and sexuality.



What do people actually want from brands on social media?

At this point you may be thinking, "Wow, okay Hootsuite—should my brand be doing anything on social media?" And the answer is yes, of course. We promise the bad news and finger pointing end here.

Our 2024 Social Trends survey showed us that consumers want to be entertained. But what content from brands do they actually find entertaining and enjoy seeing on their feeds?

Behold, the trifecta of entertainment:

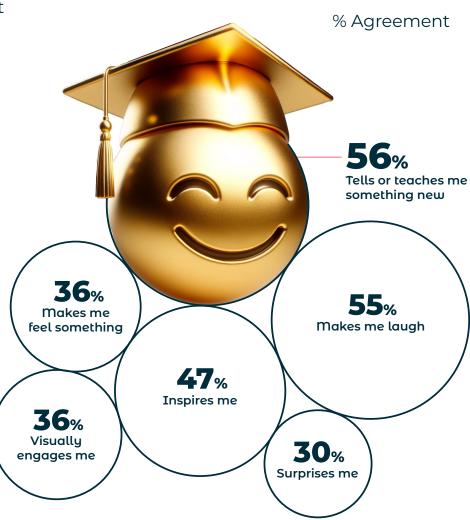
- Something new
- Something funny
- Something inspiring

If you've spent even five minutes on Instagram or TikTok lately, this won't come as a surprise. New, funny, inspiring content makes the internet go round. But an interesting opportunity emerges when we look at this data broken down by Active Shoppers vs. Casual Followers.

Active Shoppers are more than twice as likely to want surprising content compared to Casual Followers. They're also much more likely to want content that makes them feel something. This means emotive and unexpected content could be big differentiators for your brand if you're aiming to attract the attention of people most primed for purchase.

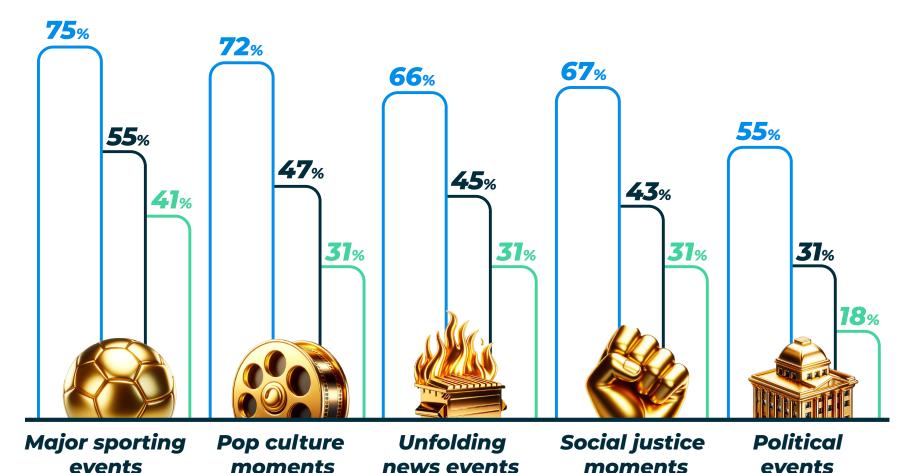
And even though people may not want to see brands jumping into hot-button debates about larger societal issues, they do enjoy brands participating in real-time cultural moments.

Consumers enjoy content from brands when it...



I like when brands join in the social media conversation during...

Casual Followers Active Shoppers All respondents



While it's helpful to see what topics consumers are more receptive to, what's even more interesting is—again—the contrast between the preferences of Active Shoppers vs. Casual Followers.

Across the board, **Active Shoppers are much** more likely to want brands to get involved in all types of cultural moments on social media—even the touchier areas like social justice movements.

What implications does this have for marketers trying to reach people at different stages of the buying journey?

If you have a strong, established community on social and you want to strengthen your relationship with them, lean into the culture. Just keep in mind that doing so is not as simple as just bulldozing your way to the *Internet Topic of The Day*. You have to do it in a way that is true to the *vibe* (IYKYK) of social but still true to your brand as well. Otherwise you could come off as if you're trying too hard.

What does that look like? Take a peek at how the Oklahoma Department of Wildlife Conservation stuck the landing during the Oscars.

However, if your primary goal is top-of-funnel brand awareness, it might be best to stick with the marketing basics. The utility and benefit of your product (preferably backed by consumer data). A consistent value proposition. Competitive differentiation. Y'know, the fundamentals.



Oklahoma Department of Wildlife Conservation 💸

@OKWildlifeDept

hypothetically,

if I was going to nominate a film about a badger, starring a badger, called "Badger," for best picture...

I would also nominate the badger, right?

10:53 AM · Jan 23, 2024 · **1.3M** Views

4,764 Reposts 298 Quotes 47.6K Likes 464 Bookmarks







Letting tight deadlines and unrealistic expectations lure you into making repetitive, boring content

Jumping on a trend or a meme just because other brands have Shoehorning your brand into larger cultural conversations



Using data about your audience's preferences to create social content that's more about THEM and less about YOU

Creating unique and entertaining content directly related to your brand/industry

Leaning into cultural moments that are actually aligned with your business



HOT TIP

Stay on top of real-time conversations across all your networks

You can see how the masses are reacting to your content across all your social networks in real time with <u>Hootsuite</u>. Set alerts for keywords and changes to brand sentiment so you can react quickly if things start going off the rails. Keep an eye on how conversations are evolving and adjust your strategy as needed.



Building a high-value following

Are social media followers actually valuable to your bottom line?

(Spoiler alert: yep)

Today's followers are tomorrow's buyers. And now we've got the data to prove it.

According to our survey, 70% of people who follow brands on social media have explicit plans to purchase from them (soon or in the future)—and 59% have already purchased from the brands they follow. And if Gen Z follows a brand, it's twice as likely to signal intent to purchase soon compared to baby boomers.

While being able to prove that followers do in fact correlate with buying behavior is exciting, marketing attribution is always going to be an imperfect science.

It's tempting to try to assign a direct dollar value to individual followers (or any combination of social media metrics). But, simply put, your time as a marketer is better spent just trying to get more followers to begin with—rather than trying to directly attribute exact dollar figures to each one. Invest your energy in creating better content and building a rich community rather than overindexing on measurement and reporting.

If followers equate to buyers, getting more followers equates to getting more buyers. And getting more buyers equates to more revenue. And getting more revenue equates to... well, you get the picture.

70%

of people who follow brands on social have explicit plans to purchase from them (soon or in the future) 59%

of people have already purchased from the brands they follow 2x

If Gen Z follows a brand, it's twice as likely to signal intent to purchase soon compared to baby boomers

Following a brand on social directly impacts purchase decisions

Sins & virtues

When asked to rank how much a brand's social media presence influences their purchases, 77% of people ranked it at a 5 or more out of 10.

What's even more telling is that only 22% of respondents said a brand's social media presence didn't impact their decision to purchase at all.

Simply put: Your brand's social media presence has a definitive influence on people's decision to buy from you.

This isn't particularly surprising when you consider that people spend an average of 2 hours and 24 minutes a day on social media, according to a survey by GWI. And according to that same survey, this equates to over twothirds of the time we spend watching television and streaming services (3 hours, 12 minutes). Meanwhile, daily social media use has been steadily going up, while TV and streaming viewing has been steadily going down.

So, to all those cynical marketing purists, maybe 58% of respondents say it's finally time to turn off the Mad Men reruns following a brand impacts and put away the Rolodex. Marketing has their purchasing decisions changed. More and more often, brand awareness is built and consumer purchasing decisions are made between TikToks and Reels. And we—as an industry—will all benefit from challenging some of our assumptions about where our customers' attention and time are really spent. Limited impact on Moderate to high impact Not at all purchase decisions on purchase decisions

What social content gets followers

Getting people to follow you is an important step toward building relevance with your customers. So what makes people decide to follow a brand?

Authentic content, inspiring content, and having a compelling point of view within your area of expertise are most likely to get you followers. Social purpose and frequency of posting are least important.

Of course, these are subjective descriptions. What's authentic or inspiring to one person may not be to another. And these concepts can mean different things in the context of different brands—especially when it comes to nebulous terms like "authenticity" and "inspiring." So we asked people what those things really mean to them.

If a brand's ethics don't match their products or services, it feels forced. My pet peeve is when brands try to jump on a culturally relevant moment just to gain traction online or with a Gen Z audience—it comes across as disingenuousness. Authenticity is the word of the year, yet it's actually pretty hard to nail down for many brands."

Harriet, Gen Z, United Kingdom

I like brands that have something to say on a given topic without sounding like they're toeing the company line or repeating what other brands are also saying on the same subject. Brands that speak to me are also ones that have relatable personalities.

David, Gen X, Canada

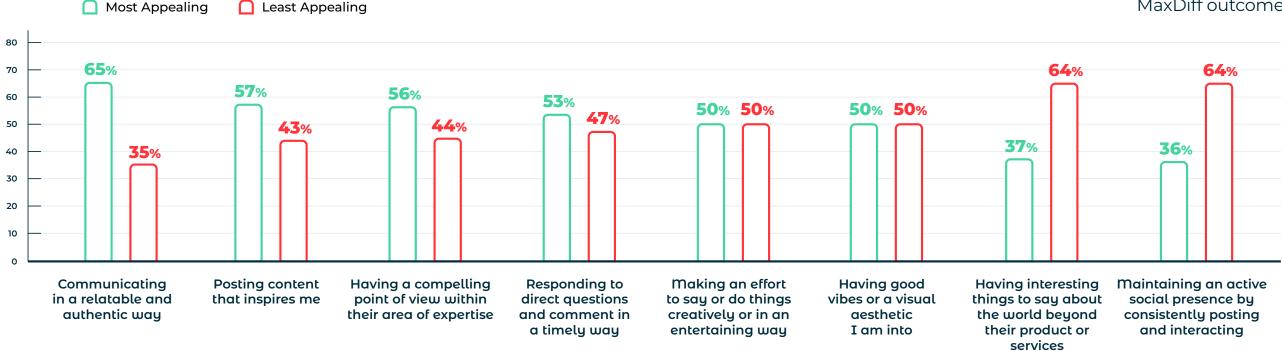
Authentic and reliable to me means relevant, sincere, creative and funny. Desperation and far-reaching attempts at humor and edginess are easy to spot.

Dawn, 65, United States



When deciding to follow a brand, what aspect of their social media presence is most appealing?

MaxDiff outcomes



Nerd alert: We didn't ask people to rank this full list of attributes from most to least appealing in one go. We used MaxDiff analysis, a survey-based research technique used to quantify preferences, which showed

them a smaller set of options multiple times and asked them which was most and least appealing. Then we aggregated the results, which resulted in a much more accurate and true ranking of people's preferences.

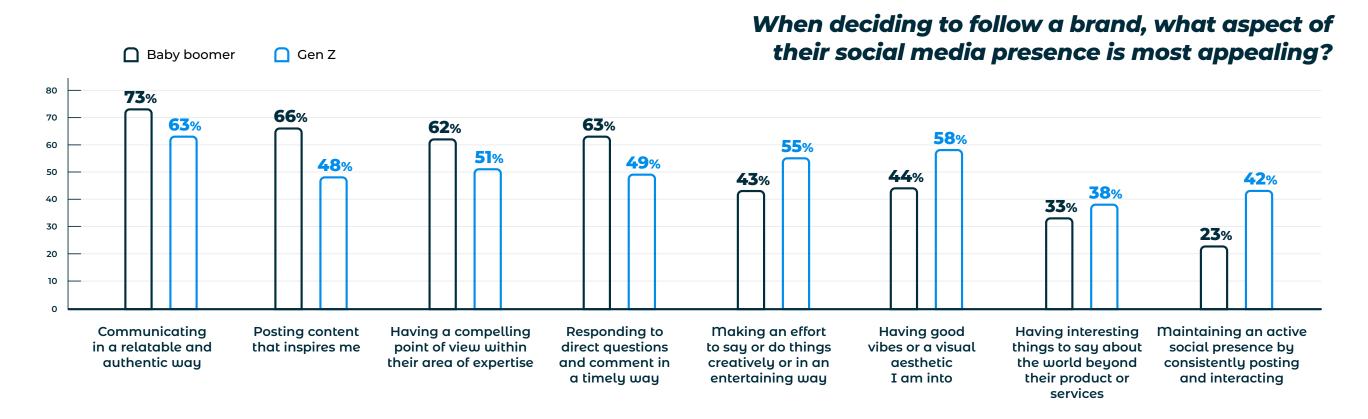
TL;DR: Because of how we asked this question in our survey, you can trust that this is really how people feel.

What gets Gen Z following

Our research shows us that younger consumers are more likely to be Active Buyers on social media. Get them to follow and you can likely get them to buy.

Sins & virtues

So what gets them following? Compared to baby boomers, Gen Z respondents were much more likely to be concerned with a brand's vibes, aesthetics, and creativity on social media compared to their older counterparts.



Is it a shock that younger consumers pay more attention to aesthetic and creative concerns than older generations do? Not really. And it's not all about superficiality either. It comes down to the type of purchases they're typically making. Over half (52%) of Gen Z said they mostly shop online when buying clothes and retail tech, according to a <u>survey</u> by Self. These sorts of smaller ticket items compete on the basis of aesthetics—especially on social. Therefore, aesthetics and vibes are top of mind when it comes to influencing the purchases of younger generations.

And that's not to discount older generations, who still actively discover and purchase from brands they follow on social media (a point we'll get into deeper later in this report). But Gen X and baby boomers, by contrast, put a greater emphasis on inspiring content, response time, and having a compelling point of view.

It's important for social media marketers—all marketers, really—to be extremely clear about who their target customers are and what their buying habits look like. Get familiar with these demographic nuances and you'll be able to laser focus your social strategy and resources on what truly matters to you customers—young and old.

Gen Z respondents were much more likely to be concerned with a brand's vibes, aesthetics, and creativity on social media than their older counterparts.

What gets Active Shoppers following

Sins & virtues

Overall, both Active Shoppers and Casual Followers find the same things most appealing when deciding to follow a brand.

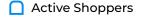
But Active Shoppers put more emphasis on brands consistently posting and interacting, as well as having interesting things to say about the world beyond their products and services (which we saw reflected in the data earlier about brands getting involved in larger cultural conversations).

Active Shoppers are mostly likely to follow brands. And people who follow brands are most likely to be Active Shoppers. It's a self-perpetuating cycle. And we point that out because getting the people who are most likely to be invested in your brand to follow your brand is what most marketers should be focused on.

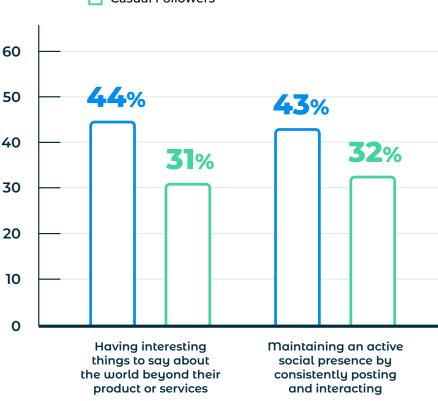
These people become your community. Or your fans. Whatever you want to call them. And once they're following, nurturing them is just as important as filling the top of the funnel with more of them.

But nurturing existing followers requires a significantly different approach to reaching newer customers. It involves creating content for people who already know you, who are familiar with your product. It involves giving them more value than just rehashing the same content that got them to follow you in the first place.

Consistency and a cultural point of view matter more to Active Shoppers











Assuming that social media followers don't matter to the bottom line

Plastering your prospects and followers with the same content

Making assumptions about consumer buying behavior based on their age



Treating followers like one of your most valuable (and probably untapped) potential customer segments Creating specific
strategies for reaching
people you're trying to
reach and engaging the
people who you've already
got to follow you

Creating a social strategy based on the nuances of your customer base and not sweeping demographic generalizations



HOT TIP

Give social a seat at the leadership table

Building and maintaining a community of high value followers and potential customers isn't light work, and it's certainly not entry level work either. <u>Hootsuite</u> can help level up your skills so that you can take a seat at the leadership table (where social belongs) and ensure the relationships you're building on your channels are leveraged across your organization.



Paid vs. earned vs. shared

There are three ways you can get in front of customers on social and build relationships with them.

- You can pay to get in front of them through social ads.
- You can organically show up on their feed thanks to the algorithmic overlords.
- And you can be lucky enough to have one of your posts shared directly with them by family or friends.

We wanted to know if these different types of exposure lead to different outcomes. Is one more valuable than the other? Do they lead to different types of buying behaviors?

To find out, we assigned different types of engagement metrics to each part of the funnel, and then measured how paid, organic, and shared brand content affect or influence those metrics.

How do different types of exposure to brand content on social affect buying behaviors?

Awareness

Being exposed to and observing the brand

METRICS:

Read the post/watch the video

Consideration

Taking a mental step towards purchase

METRICS:

Clink link, comment, follow, share

Conversion

Making a purchase

METRICS:

Buy the product/service

Here's what we found:

0

Paid posts have a huge impact on awareness and discovery 2

Organic and shared posts fuel buying behavior (and not just in young people)

3

Shared posts are most powerful for turning awareness into consideration

Definitions

PAID

Social posts from brands that are explicitly paid for/ boosted/sponsored that appear in your social feed

ORGANIC

Social posts shared by brands that appear in your social feed and are not paid ads

SHARED

Social posts from brands that friends or family share with you, either publicly or via direct message





Paid posts have a huge impact on awareness and discovery

There are some marketers out there (not naming any names, performance-marketinggrowth-hackers...) who use social advertising solely as a conversion engine, pushing out ad after ad with nothing but product shots and "buy now" CTAs. Can social ads drive immediate purchases? Absolutely. Can social ads drive immediate purchases from people who have never heard of your brand and may not even be in the market for what you're selling? Less likely! But not impossible. (We'll be the first to admit we've made a few questionable, impulsive purchases while scrolling through Instagram when we should have been sleeping.) Direct response ads work best when they're served to people who are already primed to purchase.

But our data found that 61% of people have discovered new brands, products, and services from paid social posts.

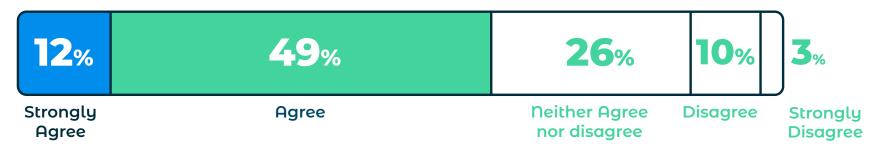
This shouldn't be surprising. There's plenty of marketing literature that proves paid brand advertising creates mental availability. Consumers are not always ready to purchase your product, but they can still be influenced by the awareness that your product or service exists—which primes them to purchase in the future. *Amazing*, right?

This means if you treat social media only as a last-click channel, you're missing out on its true

value: Creating broader awareness with your audience.

This is a difficult thing to come to grips with for marketers who have internalized this industry's institutionalized impatience, strictures of quarterly reporting, and the narcotic effect of real-time data that has added pressure on all of us to prove ROI and deliver growth *immediately* instead of over the long term.

I have discovered new brands/products/services I'm interested in from paid/sponsored social posts







Hootsuite®

Organic and shared content fuel buying behavior (and not just in young people)

Next, let's take a look at what actually works further down the funnel.

When it comes to being exposed to brand content, organic posts (along with shared posts) actually have a greater impact on conversion than paid posts do. Organic content is the most likely type of content to get people across the line and to commit to a purchase.

It's trailed closely by shared content, which very nearly matches its influence on conversion across all demographics.

Younger generations are more likely to make a purchase no matter how they're exposed to social content from a brand—but the majority of the older consumers we surveyed have also made a purchase based on social posts from brands at least once in the past 12 months.

Don't fall for false assumptions that social media is a young person's game. If you're dogmatic about social media being a channel for younger consumers, you're disqualifying a massive and highly valuable segment of active shoppers on social who are older than 35.

And the best way to get people—old and young—to commit to purchasing from you is by making organic content that's worth their time and worth sharing with their friends and family.

% of consumers who have made a purchase based on social posts from brands at least once over the past 12 months

	Gen Z and Millennials	Gen X and Baby Boomers
Organic	87 %	81 %
Shared	85 %	80%
Paid	79 %	69 %



Shared content is most powerful for turning awareness into consideration

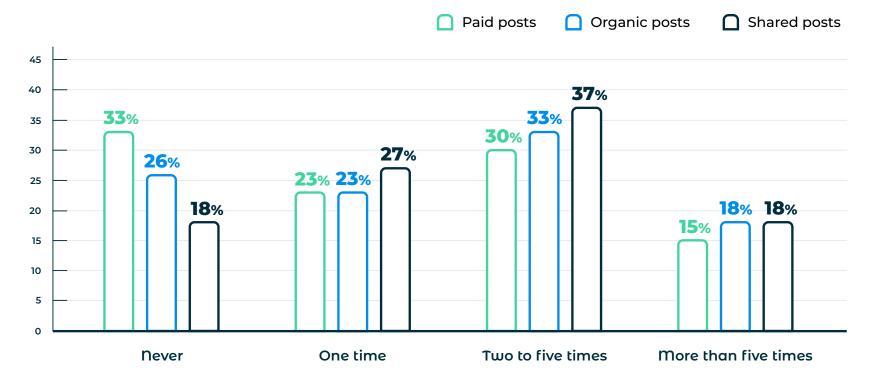
The way consumers are exposed to a brand on social matters most when it comes to nudging people from awareness to consideration, with shared posts being the most impactful.

Shared posts spurred consideration behaviors in 82% of people at least once in the last year, compared to 74% for organic and 67% for paid. And moving from awareness into consideration is a critical step in the buying journey.

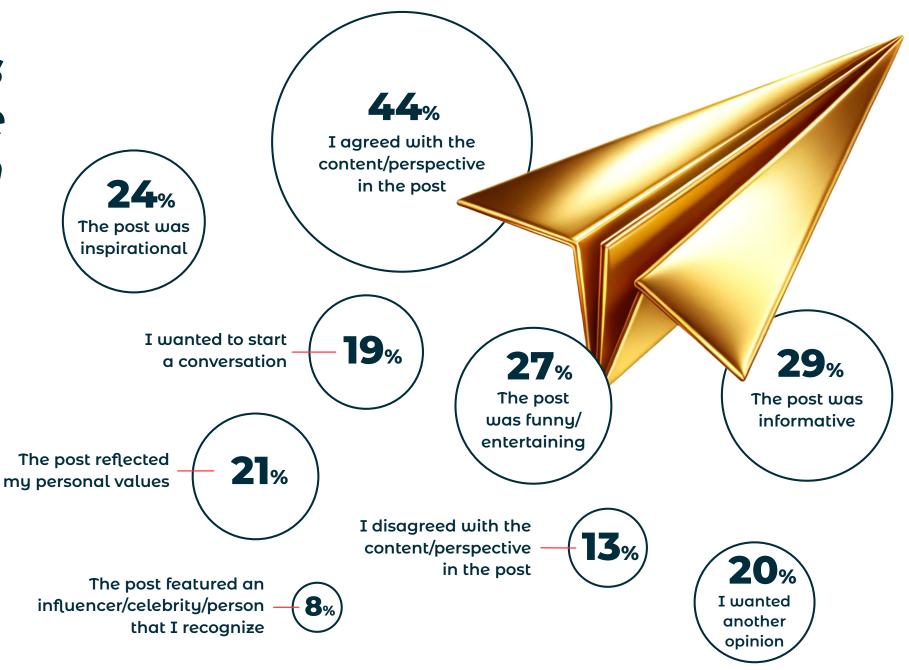
We'll keep mentioning it until it becomes annoying, but the way people make buying decisions is messy and non-linear—and it's only getting more complex. There are many things we can't know for certain about purchase behavior, but one thing we do know is that there's a complicated web of touchpoints that differs from person to person—the phase of the buyer journey that Google's Consumer Insights team have called the "messy middle."

Content that people share with their family and friends is a form of social proof that is extremely persuasive in moving people through this messy middle and towards building relevance with your product or service.

Shared posts have spurred consideration behaviors in 82% of people at least once in the past 12 months



What makes people share content from brands with family and friends?



Sins & virtues

Why do people share?

Forty-five percent of people share content because they agree with it. People are also more likely to share content they think is informative, and least likely to share content just by virtue of an influencer or celebrity being present.

Our survey also found that Active Shoppers are more likely to share content from brands for *any* reason. If you're looking to nurture relationships with the people most likely to buy from you, look to the people already sharing your content. And if you're looking to create more of those valuable relationships, then you'd better be making content that people want to share.

Having your content shared on a regular basis is a strong sign that you've built **significance** in your relationships with consumers. People are engaged with your brand. And they find your content worth sharing with their family and friends. You've earned their trust, and in return you're earning word of mouth—the most powerful marketing tool of all.

The icing on the cake is that this is a virtuous cycle. When people see content from a brand because it was shared with them by family or friends, they're much more likely to comment on it or share it themselves.

78% of people have reshared a brand post that was shared with them by family or friends in the past 12 months





Hootsuite®

Expecting every social ad you make to drive direct attributable revenue

Building a high-value following

Believing the thinkpieces claiming that "organic social is dead"

Creating content with the aim of going "viral"



Using social ads to drive top of funnel brand awareness

Encouraging conversions in your organic content because that audience is likely most primed for purchase

Making content as share-worthy as possible



HOT TIP **Track metrics that** align with your **business objectives**

All social media metrics can tell you something about whether you're achieving objectives and meeting your goals. But tracking the right metrics is the key to understanding your social ROI. Start with a focus on the few metrics that help you tell the right story and build your business case. Then check them regularly by using Hootsuite to set up automated reports that go to your inbox, so you don't have to remember to pull them yourself.



Better consumer relationships are worth their weight in gold

Social media has spent over a decade trying to prove its place in marketing departments. And while it's made leaps and bounds towards getting the respect and visibility that it deserves as a marketing channel, it's still relatively poorly understood by many marketing leaders whose careers preceded its existence—and for that, we really can't blame them. This industry moves fast. But this state of affairs has created an uphill battle for many social media managers and marketers who know social's importance but can't prove it using more "traditional" marketing metrics or reporting structures.

That's why we set out in this report to show marketers that social media matters. The relationships you build with your followers matter—and they directly impact revenue.

But building strong relationships on social media requires knowing what people want.

Like what they really really want. Social media is still—and always will be—your customers' turf.

Not yours as a brand. And all of us marketers have a responsibility to make sure that the space and time we take up is earned—because it's definitely not given, and we would be missing the point if we ever took that for granted.

Acknowledgements

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