

# New realities from brand motion study

WE Communications' inaugural Brands in Motion study, conducted across South Africa, China, the UK, the US, Germany and Australia, examines rational and emotional drivers that motivate customer choices within today's environment.



Brand categories. Image supplied.

“Sixty-three percent of people we talked to, across all markets surveyed, said they expect brands to deliver both functionality and purpose in some form,” said Melissa Waggener Zorkin, CEO of WE. “Yes, brands must continue to have great product to offer, however, consumers expect purpose to play a role as well.”

Unlike brand positioning, which assumes a static view of consumer perceptions, brand motion takes into account the influence of broader environmental factors and underlying consumer expectations.

Designed to decipher brand movement, relative to the geography, industry and key stakeholders, the study revealed four realities brands face in today’s business environment and a construct to help manage their motion, relative to forces pressuring them.

**Reality 1: Stability is an element of motion.** Despite all the rapid change at the environmental level, there are a high number of consumers that believe brands are capable of providing stability in uncertain times. Ninety percent of respondents in South Africa said they believed brands can provide stability — creating a huge opportunity for brands to step up and offer new value to customers as a stabilising force.

**Reality 2: Cutting edge is transcendent.** The study also found a high correlation between brands that are viewed as cutting edge, also being loved versus hated, seen as out for the common good versus doing harm, and viewed as a pleasure versus a misery to do business with. This connection strongly suggests that being cutting edge — whether enabled by technology or inspired by it — leads to positive brand outcomes in areas that transcend product.

**Reality 3: The Unilever effect.** Across all six markets, half or more of surveyed consumers – and 67% in South Africa – said they placed a balance on brands delivering not only highly effective, high-functional benefit products and services but also taking an active position on issues that provide long-term social value. Consumers increasingly expect brands to take a stand on important issues, especially if in direct conflict with their core values as an organisation. This is almost equally weighted in purchase decisions.

**Reality 4: Love you today, shame you tomorrow.** Out of all eight categories in the six markets surveyed, 54% of people said they loved the industry; however, 98% of people said they would gladly join in public shaming of that industry if it stepped out of line. Brands today must build stronger emotional connections with consumers to keep customer loyalty — especially in times of crisis. In South Africa, tech B2B has the highest likelihood to defend, with 42% of respondents indicating they would defend these brands “to the bitter end.”

## Motion matrix

WE Communications developed a matrix to help brands understand and manage these realities and the larger environmental factors in play. The Motion Matrix is a diagnostic tool that uses rational and emotional scores to capture the movement of categories and brands against four quadrants.

“At its core, traditional brand positioning is a flawed construct,” said Alan VanderMolen, President International & WE+. “Brands need to understand and capitalise on the forces of motion around them and turn that into momentum. The Motion Matrix gives them a way to do that.”

Would consumers care if your brand disappears tomorrow? Will they publically shame you if you screw up? Will they forgive you? Do they see you as a misery or a pleasure to do business with? By understanding consumer mindset through the lens of motion, the new Motion Matrix allows brands to not only see where they land, but get prescriptive guidance on what they can do to move.

## Categories

Those that score high in both emotional and rational drivers are Movers — a brand or category that has found the right balance of emotion and rational thoughts. In South Africa, brands in the computing devices and tech B2B categories scored well in this quadrant.

High in rational but low in emotional drivers are Defenders. They may be selling commodity, low- margin/high-value products and services or be part of highly regulated industries. Many companies that fall here might be satisfied with being a Defender, but due to low emotional connection, they risk losing customer support in times of crisis.

Low rational and high emotional scores fell into the Agitators quadrant. These are the game changers, wooing consumers into what’s possible through high experience and engagement.

A Survivor scores low in both emotional and rational drivers. These brands have either just pulled through something big or are on the precipice of needing to. They need to be ready to move fast to reach people on a rational and emotional level to move their brand to a leading spot in the industry — or risk becoming irrelevant. In South Africa, the finance and automotive industries are in survivor mode and have yet to find a shared, common vision with consumers. This is not a comfortable place for a brand to be.

## Methodology

WE partnered with YouGov to field the Brands in Motion survey in six countries among public and B2B decision-makers. The benchmark was conducted in two waves: first in April 2017 in the US, UK and China, and second in July 2017 in Australia, Germany and South Africa. It was designed to target a minimum of 3,000 consumer interviews and 1,000 B2B decision-makers per country with an average of 300 ratings per brand. It looked across eight categories and 30 brands within each geography. Not all categories were surveyed in smaller markets. It also captured key demographic data to be able to plot the results against, including generation, gender, education, income, parent/nonparent, region, employment status, marital status and race/ethnicity.

The eight industry categories included computing devices, smart home, automotive, finance, health and wellness, and alcoholic beverages. The last two were among the B2B audiences: technology solutions for business and healthcare solutions providers.

The research complements the agency's Stories in Motion pilot study released in November 2016. For more information, click [here](#).

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