

Brand and Communications Research

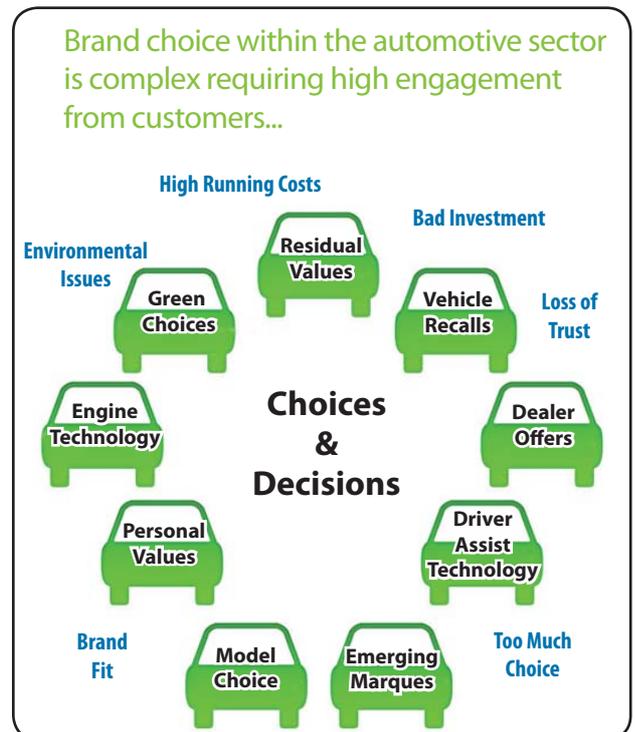
Automotive Insight

The influence of context

For drivers, buying a car can be one of the most satisfying experiences or one of the most stressful. Emerging manufacturers, competitive dealer offers and product recalls all add to the pressure of making the right buying decision; a decision often based on budget, engagement in the sector and/or feelings towards new technology or the environment.

Manufacturers offer such a wide range of choice that they need to ensure their position is clearly defined and works in tandem with what drives consumer behaviour. Only then can they successfully focus and deliver on their communication, branding and positioning efforts based on consumer perceptions of their own and competitor brands.

By combining our knowledge of consumer decision making with a **deep awareness and appreciation of the automotive sector** we understand the factors that influence choice in this marketplace.



We can help you to...

- monitor and explain the evolution of **consumer connection to your brand** and their specific associations and perceptions
- develop and monitor a set of the most influential and important consumer needs and attributes which drive purchase or improve consumer connections with your brand, and **explain changes in brand perceptions**
- measure the **relative impact** of various **marketing efforts** and initiatives and their impact on the brand

We offer a comprehensive yet flexible **measurement, monitoring and listening programme** to evaluate the continuous progress of your brand relative to competitors.

Our approach to monitoring brand health is based on our knowledge of how decisions are made and our experience of measuring brands and marketing effectiveness over many years. It incorporates our philosophy on the elements that are critical to brand and communications success today - understanding and measuring brand engagement.

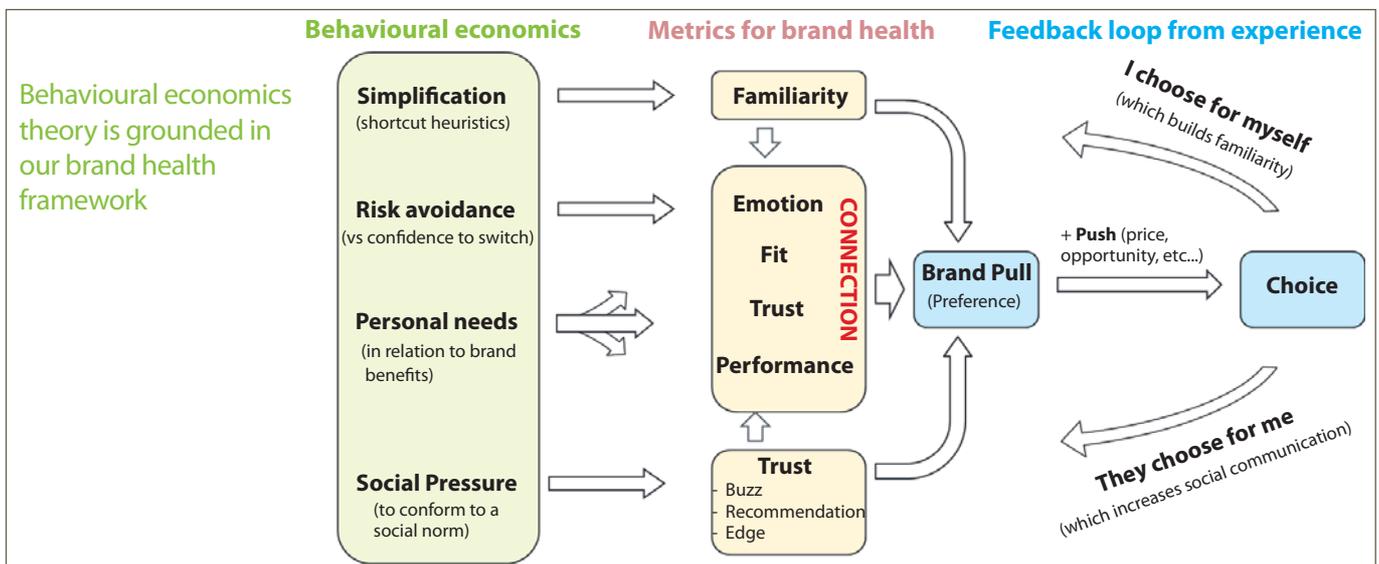
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Our approach

Today we live in a multimedia age where the target audience is bombarded with messages, and where **brand success is based on both rationally and emotionally engaging the consumer**. In turn, marketing communications must aim to strengthen these bonds and make the target audience more engaged with the brand.

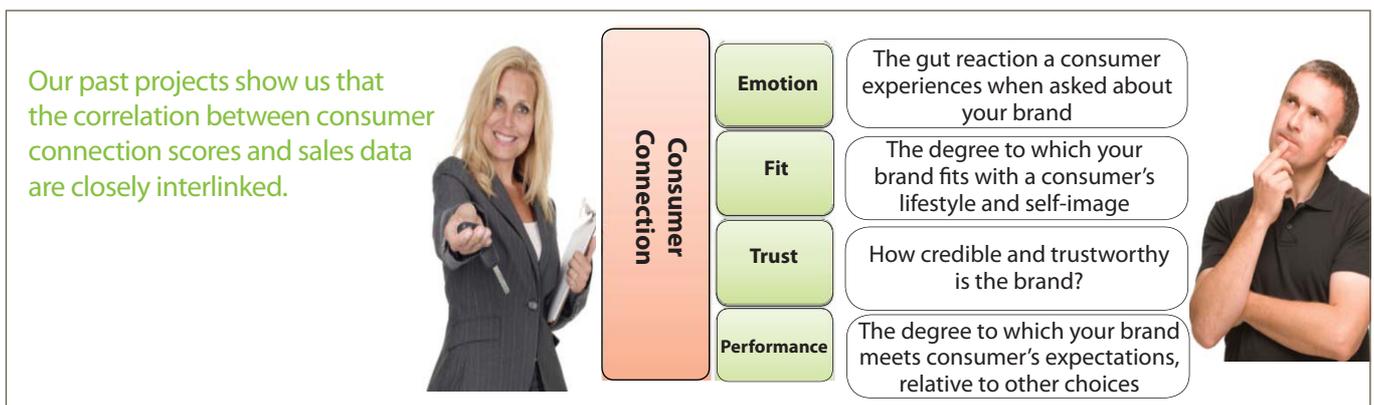
Our brand health measurement recognises that decision making has both rational and emotional components and that, ideally, people choose brands to meet their rational and emotional needs and, ultimately, reflect their personal values. But we also know from **behavioural economics** that this logic can be modified by other factors, such as lack of time, wanting to avoid risk or the pressure to conform to social norms.



Our studies include diagnostic modules that underpin each brand health metric

The prerequisite for a brand's success is the development of a deeply held and almost instinctive bond with its consumers. This bond we call **Consumer Connection**.

- It can be **measured**.
- It is **predictive** of reported behaviour and actual behaviour.
- It is a **diagnostic** marketing tool to understand how to *strengthen your bond with consumers and competitive vulnerabilities*.

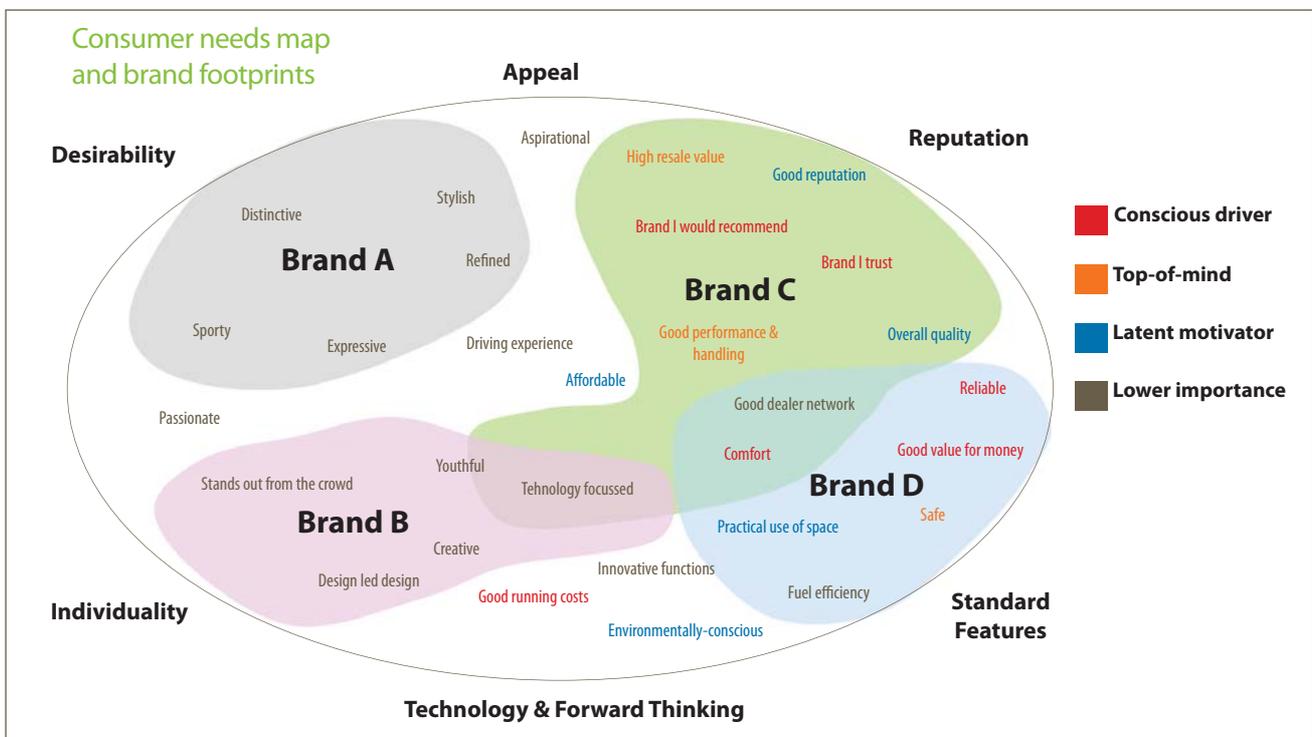


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In order to understand the market place and whether a brand strategy is working, we investigate what the emotional and rational consumer needs are and identify the key drivers of purchase or consideration.

A **consumer needs map** is created based on the level of importance of each need to the consumer. In a different colour we highlight needs which consumers say are important to them as well as the needs that drive the consideration or consumer connection with your brand. Taking this a step further, we then overlay the map with **brand footprints** based on the brand performance to see which brands occupy which area of consumer needs.



In this example, Brand D is seen as much more of a Fuel Efficient and Reliable brand whilst Brand C's strengths lie in its overall reputation. Also, we can see how important these attributes are to consumers. For example Brand A occupies an area of attributes associated with Desirability, however none of these attributes are either strong drivers of purchase or of high importance to consumers. This suggests that the brand performance and future growth is very weak for this particular brand.

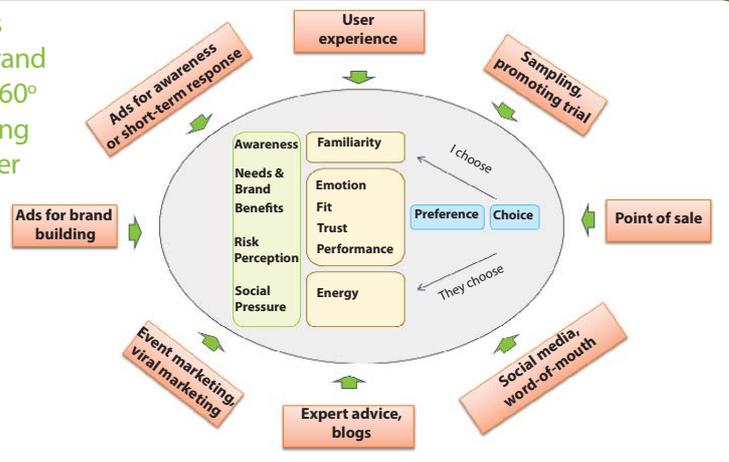
Isolating the contribution of each communication and experience...

In measuring brands we take account of both marketing influence and consumer experience. This means we are monitoring not only traditional 'push' marketing activities, such as advertising for brand building or short-term response, but measurements coming from usage experience too. We also look at online and offline experiences from blogs, social media and word-of-mouth so that **we consider a 360 perspective of marketing influence and consumer experience.**

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Our tracking programs measure changes in brand health, driven from a 360° perspective of marketing influence and consumer experience



A typical person will have multiple exposure and recall of advertising, word-of-mouth comments and usage or service experiences, spread across digital and non-digital channels. Teasing out which communications or experiences have driven changes in brand perceptions and consumer connection can therefore be challenging.

Our **TrueLift** modelling, enables us to do just that. We model the data, so we can compare brand perceptions for people who have experienced a touchpoint (e.g. an advert or a usage experience) versus those who have not experienced it, excluding the effects of all other experiences and different levels of brand involvement. In this way we can reveal the contribution of each touchpoint, providing you with valuable insights that will help you to determine how to make best use of your marketing spend.

TrueLift modelling distinguishes the effects of different media on awareness of the brand

	TV & TV Sponsorship	Web & Direct Mail	Press & Posters	Social Media	Direct Brand Interaction		
Familiarity	75	11.40%	8.50%	no effect	0.50%	12.70%	Takeaway TV & Sponsorship increases familiarity by 11.4% Direct Interaction has the greatest effect on 'Likeability' and 'Most Likely to Consider'
Likeability	69	8.20%	9.10%	no effect	9.70%	14.60%	
Consideration	51	3.70%	13.60%	0.60%	no effect	13.20%	
Most likely to Consider	23	no effect	5.00%	1.10%	no effect	8.10%	

Touchpoint efficiency	TV & TV Sponsorship	Web & Direct Mail	Press & Posters	Social Media	Direct Brand Interaction	
Total Annual Spend	£3,500,000	£2,800,000	£1,250,000	£5,000,000	N/A	
Familiarity	3.26%	3.04%	no effect	0.10%	12.70%	Average % change per £1m spend
Likeability	2.34%	3.25%	no effect	1.94%	14.60%	
Consideration	1.06%	4.86%	0.48%	no effect	13.20%	
Most likely to Consider	no effect	1.79%	0.88%	no effect	12.70%	

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TrueLift modelling distinguishes the effects of different media on perceptions of the brand

Image Attribute	TV & TV Sponsorship	Web & Direct Mail	Press & Posters	Social Media	Direct Brand Interaction
Affordable	10.5%	8.6%	8.4%	6.8%	12.7%
Practical use of space	10.6%	11.4%	7.4%	6.1%	14.7%
Brand I would recommend	7.7%	8.1%	5.4%	11.1%	9.3%
Expressive	8.4%	9.7%	3.2%	4.5%	5.6%
Environmentally conscious	9.6%	7.2%	3.4%	6.8%	4.7%
High resale value	4.5%	6.8%	no effect	9.2%	9.2%
Reliable	2.1%	6.5%	8.9%	12.9%	12.9%
Distinctive	no effect	10.8%	7.8%	2.1%	no effect

Takeaway

Direct Brand Interaction has the greatest impact on perceptions of Affordable, Use of Space and Reliability
Social Media has the greatest effect on the Conscious Drivers of Recommendation and perceptions of Reliability

The previous 2 charts show how targeted marketing (above-the-line) strengthened Familiarity and Consideration across the Purchase Funnel whilst Direct Brand Interaction had the greatest positive effect on Likeability and Purchase Intent. On an individual attribute level, Social Media has the strongest impact on Recommendation and Reliability whilst Direct Brand Interaction supports Affordable, Practical use of Space and Reliability.

In summary...

We believe that there are four key areas which set Harris Interactive apart, helping us to deliver a tailored, flexible and enduring programme:

- The brand and communications framework is grounded in behavioural economics; it offers an unparalleled understanding of how decisions are made in automotive markets
- The overlaying of the consumer needs map with brand footprints; enables you to effectively evaluate the future growth strategies available to you in the marketplace
- The integration of traditional non-digital, digital and social media probing; reveals the impact of your marketing efforts together with the influence of your consumers' experiences to provide a 360 degree perspective
- The use of TrueLift modelling to distinguish what kind of effect different marketing efforts have on the brand; empowers you to allocate resources more effectively and deliver a greater bang for your marketing buck.

To find out how we can help your organisation measure its Brand and Communications:

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