



Which social media brands resonate best with consumers?

Fresh perspectives and insights on social media brands in the UK, US and UAE





Introducing a new way to measure brand health

The challenges brands face

New realities of work and health have changed the way consumers view their world. It's more important than ever for brands to understand how these sweeping changes impact buying decisions and choices now.

Much has been reported about the economic impacts of the pandemic, and how new financial pressures are the underpinning of many fundamental shifts in attitudes and spending behavior.

Consumer landscape

The unprecedented pace of consumer change and competitive innovation places new pressures on brands.

Consumers are trying and evaluating new products for the first time – a threat for established brands and a great way for challenger brands to gain increased exposure.

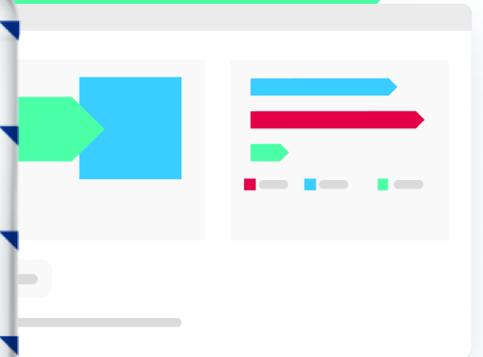
Brand challenges

Consumers expect more from brands; needs and opinions evolve quickly.

Brand health metrics need to be agile enough to keep pace with consumer change and also be able to inform your future decision-making.

Most brand health metrics are rear-facing and take weeks to update, meaning you can't move quickly enough or grasp the opportunity ahead of you.

In this piece, you'll learn what traditional brand health measurement isn't giving you and how a more holistic approach can help





The pitfalls of traditional brand measurement





A checklist for successful brand health measurement

When we talk to CMOs of successful brands, these are the key elements we see in their brand health tracking programs:

Future relevance and vitality metrics

These measurements help determine how the brand is performing against consumer expectations moving forward, including creating a sense of excitement and belonging.

Consumer engagement

An understanding of how well the brand is engaging with consumers in a two-way conversation and using consumer feedback and ideas.

A more holistic view of brand health

Look beyond traditional brand equity measurement alone to understand where the brand and competitors are really positioned and headed.

Linkage between brand metrics and marketing outcomes

This allows for the impact of performance and campaigns to be fully assessed and continually improved, also underpinning the ROI of the brand health program itself.

The competition

Ongoing benchmarking with key established and emerging competitors to understand and stay ahead of opportunities and threats identified beyond traditional brand equity measurement.

Highly actionable outputs

These provide a granular and diagnostic view of the brand and category competitors' relative strengths, weaknesses and shifting positions over time.

Agility and automation in the program itself

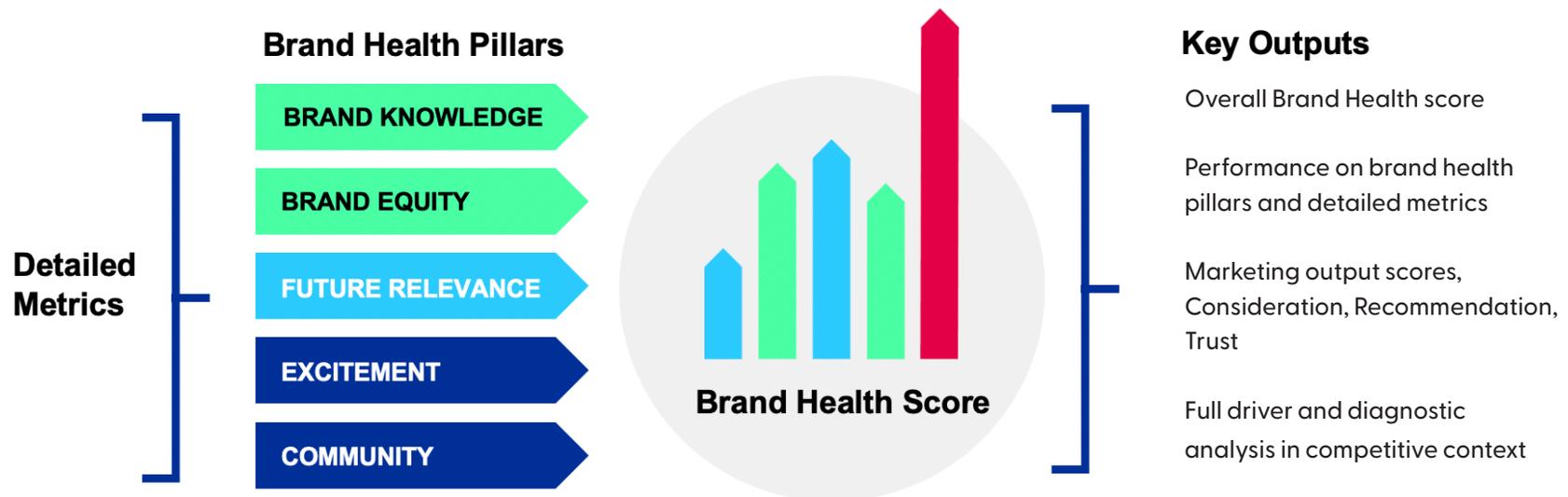
This simplifies the process and delivers timely results that enable impactful decisions faster, with the flexibility to adapt quickly to fast-moving developments.





A holistic approach is essential

Traditional brand models are often based on measuring current or past success, they don't typically explore consumers' expectations or needs going forward and whether the brand is perceived to be relevant to consumers in the future. Traditional measures still have a place, but there is a need for an enhanced model that enables brands to grow with consumers and consider the whole relationship.



Assessing future relevance and vitality alongside brand equity, all in a competitive context, provides a more holistic view of the brand's overall health and relative position. This can be achieved either on a stand-alone basis or integrated with existing brand trackers, also encompassing category needs and specific brand attributes/perceptions for a fully complete picture. Detailed metrics sit behind the key brand health pillars, enabling a full diagnostic analysis of what's driving brand health on these different dimensions and where to take action to address weaknesses and exploit opportunities.

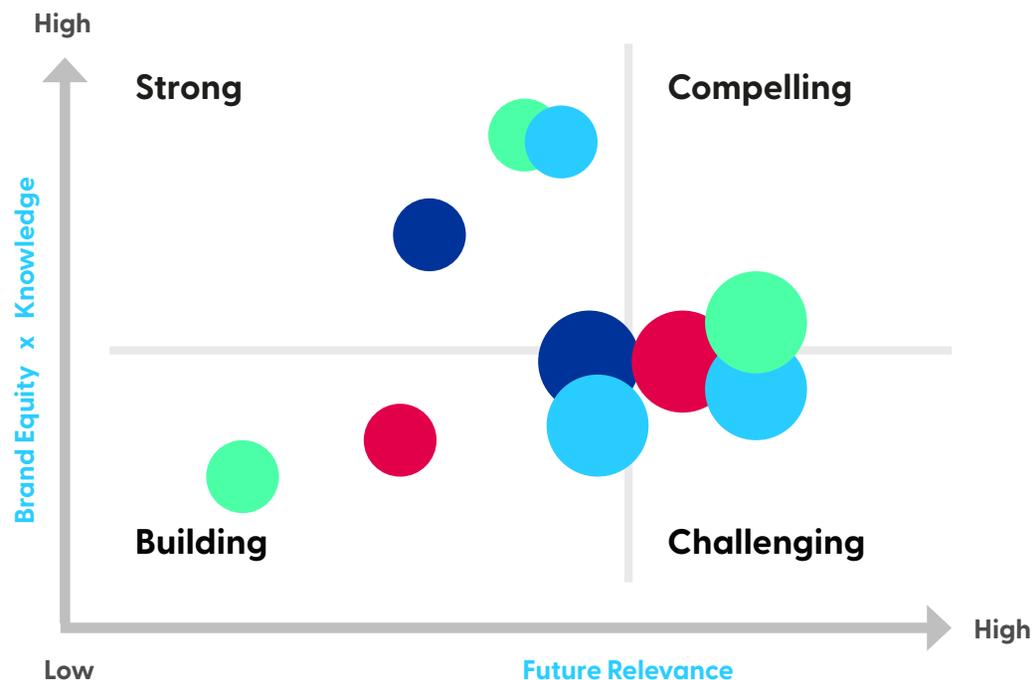


Assessing brand health outcomes in context

The more holistic view allows for brand health to be assessed in a way that encompasses both existing equity and projected future relevance.

Strong
Strong brands: high present equity and penetration. They are not perceived as relevant to consumers in the future. These brands tend to have medium or low vitality.

(Re)Building brands
Low equity and low penetration with low future relevance. Their vitality score also tends to be small.



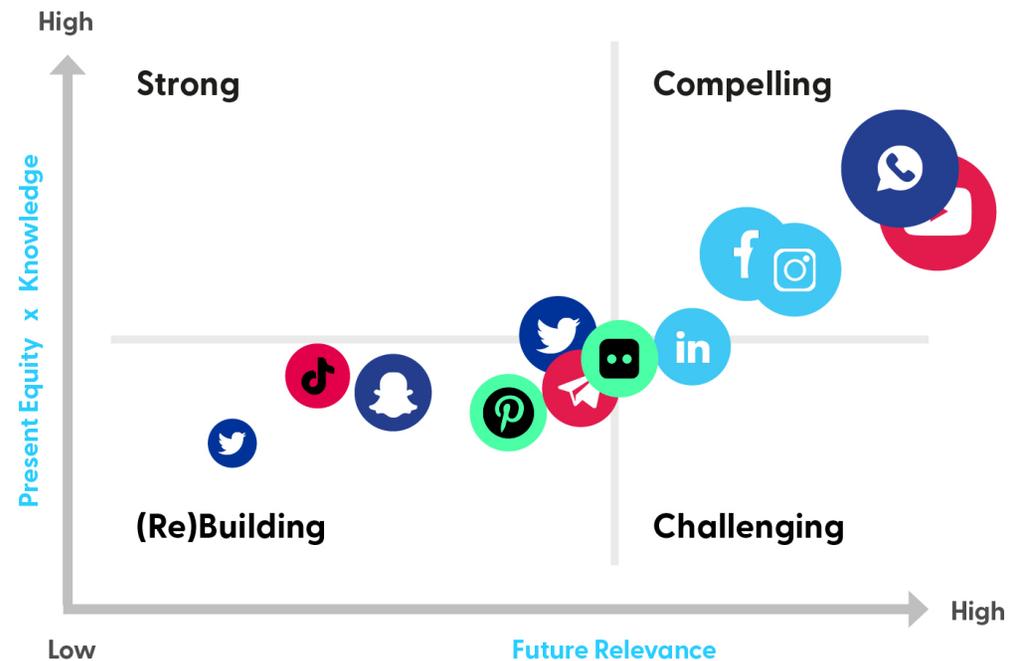
Compelling brands
Tend to be mass market with high future relevance. These brands also perform well in terms of vitality; their bubbles being larger than those brands in the Strong quadrant.

Challenging brands
Challenging the status quo. These are brands that are niche and tend to have good equity, but penetration is still low. These brands possess very high vitality and are future-proofed.



Understanding the competitive landscape – social platforms in the UK

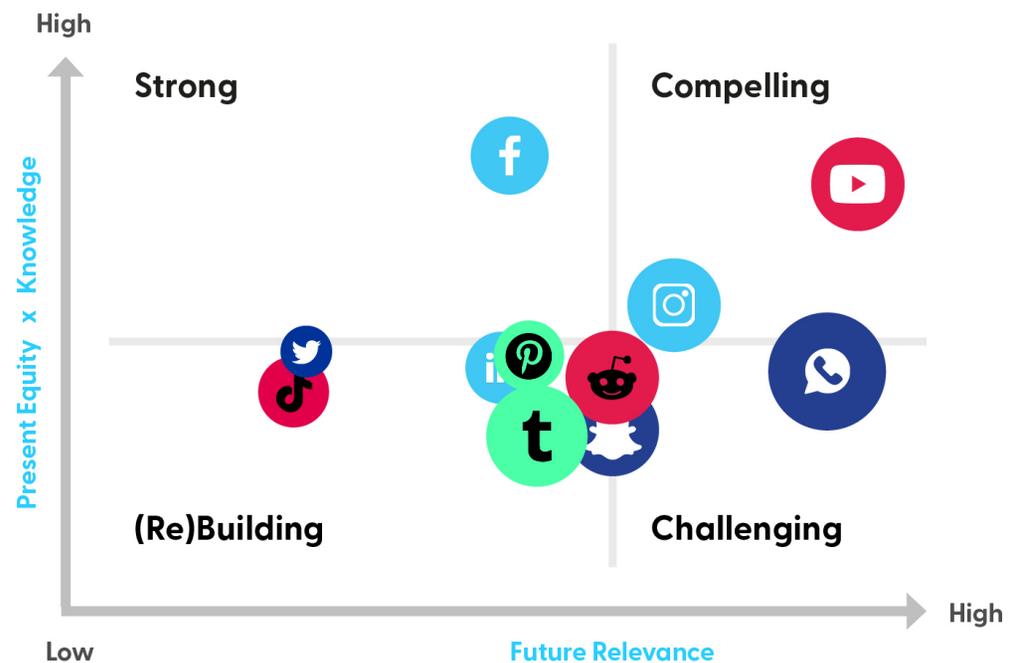
In this real example of UK social media platforms, the relative strengths and positions of leading brands are based on a nationally representative sample. The Facebook family of brands dominates and we see WhatsApp in a very strong position, with high future relevance and vitality, as well as strong equity. Tik Tok's position here is influenced by the nationally-representative view and would appear stronger on future relevance and vitality through the lens of younger age groups. Discord has particularly high vitality and future relevance as it evolves from a platform for gamers to wider appeal and use, attracting serious attention along the way. Digging deeper into the data, we see that although Discord ranks lower on brand knowledge, it is high on brand excitement and creating a sense of community, with good levels of trust.





Understanding the competitive landscape – social platforms in the US

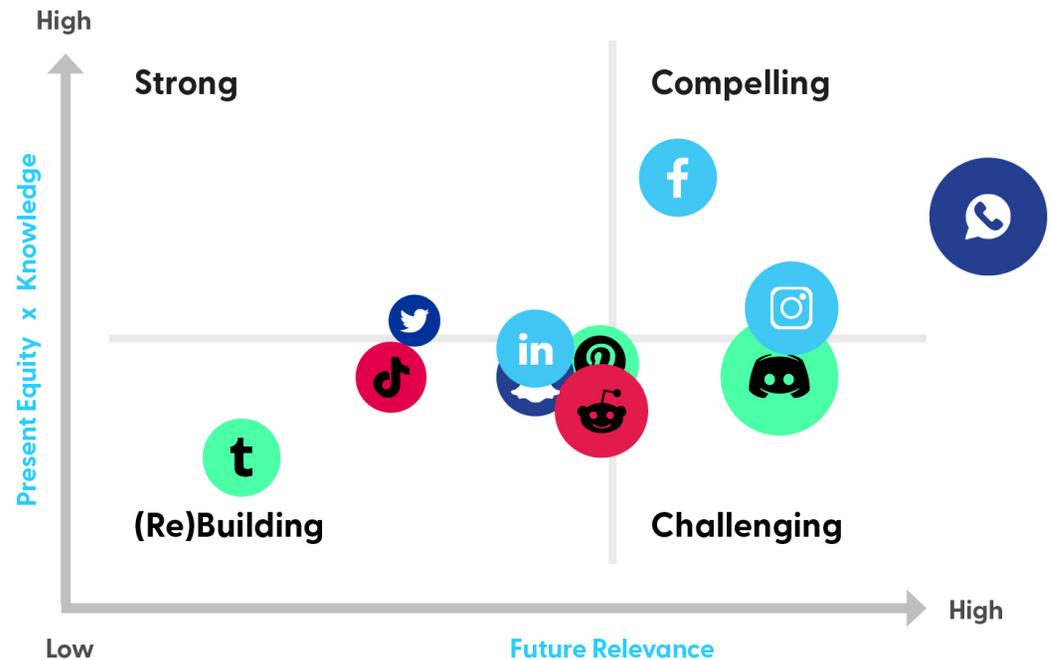
In the US, the inclusion of YouTube illustrates how different brands can influence the relative position of brands. Here we see WhatsApp in more of a challenger position, with stronger vitality, compared to YouTube. There are a large number of leading brands competing to differentiate in the middle ground, particularly on future relevance and vitality; and again we see Tik Tok's position influenced by the nationally-representative sample. Looking deeper, Facebook has very strong brand knowledge, but ranks lower on excitement, relative to other leading brands here. Perceptions of trust are varied across some of the most used platforms.





Understanding the competitive landscape – social platforms in the UAE

In the United Arab Emirates, there is a more linear relationship between the brands, but again, WhatsApp and YouTube lead the pack; they are both strongest on all three core pillars of brand equity, future relevance and vitality. Instagram has a very similar overall position compared to the UK, but has less advantage over Facebook on future relevance compared to both the UK and the US. It is more difficult to pull apart the relative strengths and weaknesses of leading brands on the core brand health pillars here, highlighting the importance of also measuring the custom brand attributes that are important to you.

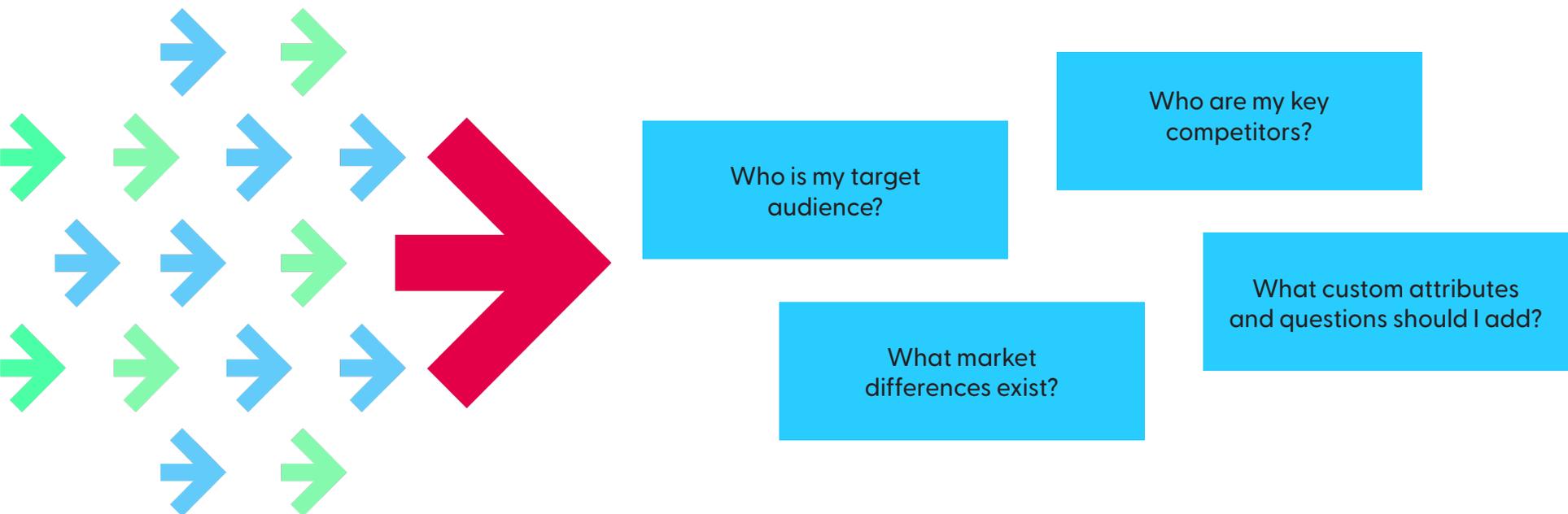




Key questions to guide your approach and view

The examples shown here were based on a nationally-representative sample, focused on leading brands chosen in advance and with slight differences in the brands covered by the market, which are all important factors to consider when defining the focus that is right for you. Consider your target audience (sample), key competitors and any market differences carefully, as all these elements can influence the outcomes significantly.

Also think about your own custom brand attributes and questions to add, to provide further diagnostics and actionability based on your overall brand position and opportunity; and to understand how your brand performs on the elements most important to you, and relative to your competition.





A new approach to brand health

In today's ever-changing market, you need a brand health measurement solution that meets the needs of the new CMO, and unfortunately, very few methodologies are designed to do just that.

To keep pace with consumers, the market, and more, brand health provides insight into relevant metrics designed to ensure success.

Start Knowing

Toluna delivers real-time consumer insights at the speed of the on-demand economy. By combining global scale and local expertise with innovative technology and award-winning research design, we help clients explore tomorrow, now. Toluna is the parent company of Harris Interactive Europe and KuRun Data. Together, we push market research toward a better tomorrow.

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