



Stories in MOTION

SUMMARY RESULTS US, UK AND CHINA
NOVEMBER 2016



STORIES ARE IN MOTION

The mobile web and search are shaping a new world of branded news and information. A world where the consumers of news and information have the power to select which on-ramp to use to access the content they value – on their own terms.

Social, mainstream, digital, owned, paid and experiential are equal partners in this media ecosystem. An ecosystem where analytics and insights are balanced with creative and editorial; an ecosystem where buying platforms increasingly bleed into the space. It is an ecosystem where the notion of traditional influence is clashing with the new reality of paid influence.

Brands and their stories are now in motion at a greater velocity than ever before...across devices, platforms and channels. This means that brands must create deliberate threads of content that engage consumers in their daily motion. This means brands must move away from static messages and single-platform content and create, co-create and amplify real-time, living Stories in Motion.

- Melissa Waggener Zorkin, Founder and CEO



THE STUDY

WE Communications conducted this Stories in Motion study to examine consumer behaviours in relationship to branded content and how these behaviors change by channel, platform and by time of day and product category.

The online study surveyed 1,000 respondents per market in the US, UK and China during October 2016 and was conducted by research firm YouGov.





A WORLD OF

MULTIPLICITY



A WORLD OF MULTIPLICITY: MULTIPLE DEVICES

Device	Country	 First Thing	 Morning Commute	 Lunch Time	 Early Evening	 Middle of the Night
 Smartphone	US	68%	25%	63%	59%	33%
	UK	59%	16%	57%	56%	20%
	China	81%	73%	61%	63%	51%
 LAPTOP	US	14%	2%	21%	38%	13%
	UK	11%	1%	19%	41%	8%
	China	8%	3%	6%	36%	22%
 TV	US	28%	0%	15%	51%	18%
	UK	18%	0%	12%	55%	7%
	China	6%	0%	11%	46%	25%

The smartphone rules them all. Its high mobility and established eco-system of devices, mobile first channels and mobile optimized content has empowered consumers to engage with a multitude of stories and content regardless of time of day or channel.

However, the smartphone is not our sole device. Laptops and desktops play a key role in branded content consumption and are influenced by location and the types of content engaged with. Multiple device use is at its peak late in the day when consumers are most likely at home. Here content is in the greatest motion, seamlessly traversing TVs, laptops and smartphones. We are also engaging at work when, similarly, we have access to more devices.

Device consideration must be a part of the engagement equation but don't expect your target audiences to engage with deep detailed content and stories when smartphones are their primary device. The consumer will have the greatest momentum when engaging across multiple devices. In this instance, stories must drive a unified narrative and experience that mixes both short and long form content.



A WORLD OF MULTIPLICITY: MULTIPLE CHANNELS



Country	 First Thing	 Morning Commute	 Lunch Time	 Early Evening	 Middle of the Night
US	11*	3	10	11	6
UK	7	1	8	13	4
China	11	8	10	16	12

* TOTAL POSSIBLE NUMBER OF CHANNELS CONSUMED (E.G. SOCIAL MEDIA, NEWSPAPERS, RADIO, TV)

The motion of content is also impacted by the volume of different platforms and channels that we traverse throughout the day. The smartphone is the primary driver of this motion mostly accessing news and retailer sites through to social media and chat/messenger services.

But it is not just 'new media' channels that can drive and influence motion. Surprisingly, email and word-of-mouth are seen as some of the most influential sources of product information shared between consumers.

Marketers will need to evolve and optimize the alchemy of their brand communications. The more channels at play, the greater the velocity of a motion. When consumers are traversing channels and content at speed, every touch point, each story and each piece of content needs to work together.

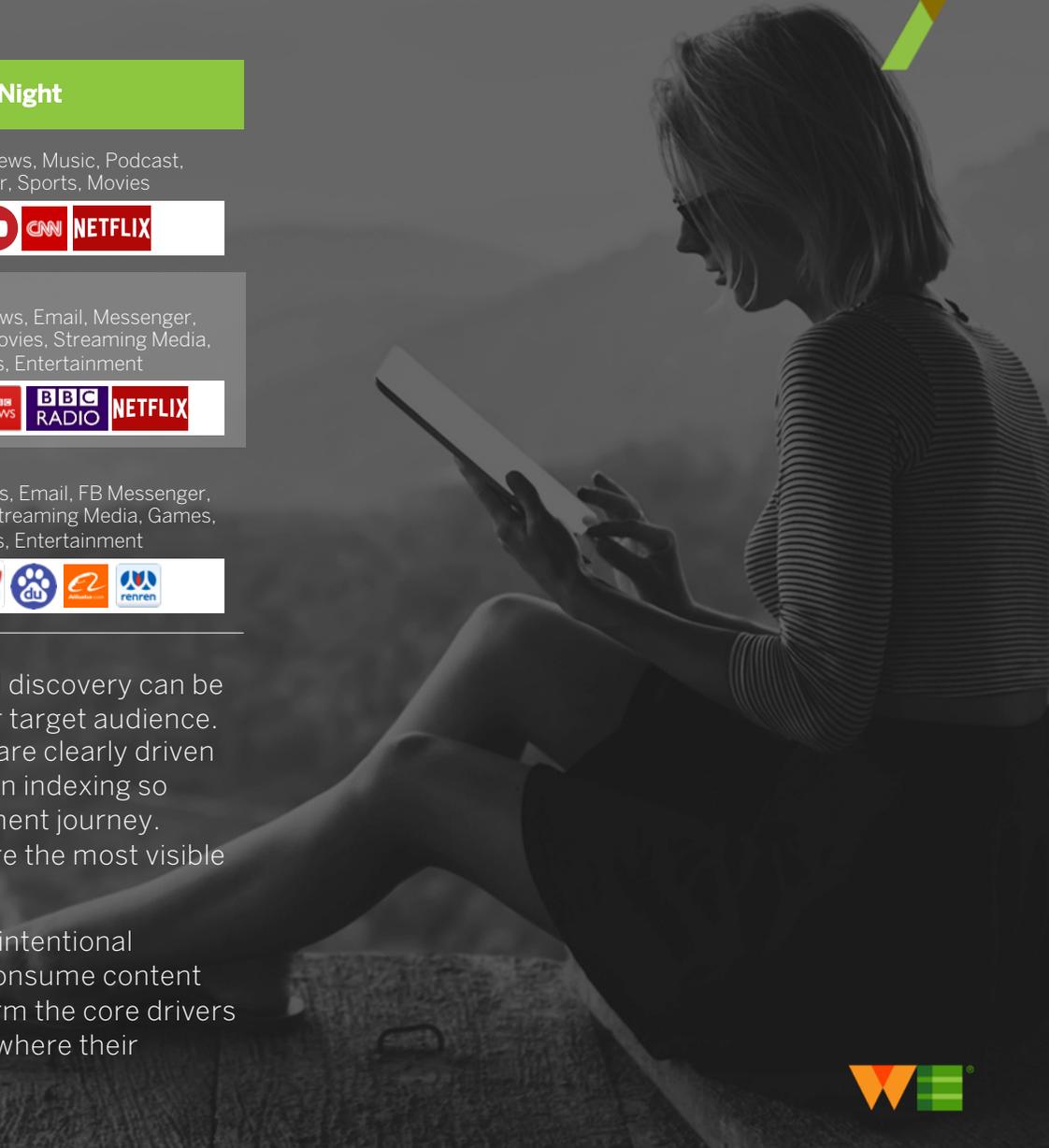


A WORLD OF MULTIPLICITY: MULTIPLE CONTENT

Country	Morning	Mid-Day	Night
 US	Email, Entertainment, Sports, Music, Hard News, Messenger, Retailer 	Email, Entertainment, Sports 	Email, Hard News, Music, Podcast, Messenger, Sports, Movies 
 UK	Email, Entertainment, Sports, Music, Hard News, Messenger 	Email, IM/Chat, Entertainment, Sports, Music 	Music, Hard News, Email, Messenger, Sports, Music, Movies, Streaming Media, TV Shows, Entertainment 
 China	Email, News, Entertainment, Sports, Music, Hard News, FB Messenger, IM/Chat 	Email, Entertainment, Sports, News, IM/Chat 	Music, Hard News, Email, FB Messenger, Sports, Movies, Streaming Media, Games, TV Shows, Entertainment 

Engagement is inherently influenced by the motivations of the consumer. Content searches and discovery can be both intentional and unintentional and the context of each search can impact the actions of your target audience. Intentional searches, where the consumer is actively engaged with finding specific information, are clearly driven by the need to answer a certain question hence sites such as Google, Baidu, Alibaba and Amazon indexing so highly. But, this requires brands to understand where their audiences are on the brand engagement journey. Without this, they are unable to effectively nestle stories and content in the places where they are the most visible and most effective.

The greatest challenge for brands is how to influence the motion of customers that are on an unintentional journey. These unintentional searches can be defined as those instances where you passively consume content and stories that you weren't actively seeking. Consumer interests and behaviours will always form the core drivers of these searches so brands need deeper audience insight and understanding to better predict where their customers will land.



IMPACT OF

MOTION



IMPACT OF MOTION: THE ROLE OF INTENTIONAL VS. UNINTENTIONAL SEARCHES



Type	🇺🇸 US		🇬🇧 UK		🇨🇳 China	
Intentional Search	52% saw positive content as motivational	40% saw negative content as discouraging	44% saw positive content as motivational	36% saw negative content as discouraging	51% saw positive content as motivational	51% saw negative content as discouraging
Unintentional Search	22% saw positive content as motivational	23% saw negative content as discouraging	12% saw positive content as motivational	17% saw negative content as discouraging	27% saw positive content as motivational	31% saw negative content as discouraging

For brands, the opportunity to enhance motion can be achieved by being visible in both intentional and unintentional searches.

Intentional searches have the greatest impact in shaping behaviour, brand preference or purchase. Both positive and negative information discovered through intentional searches has the greatest impact on driving a consumer to purchase.

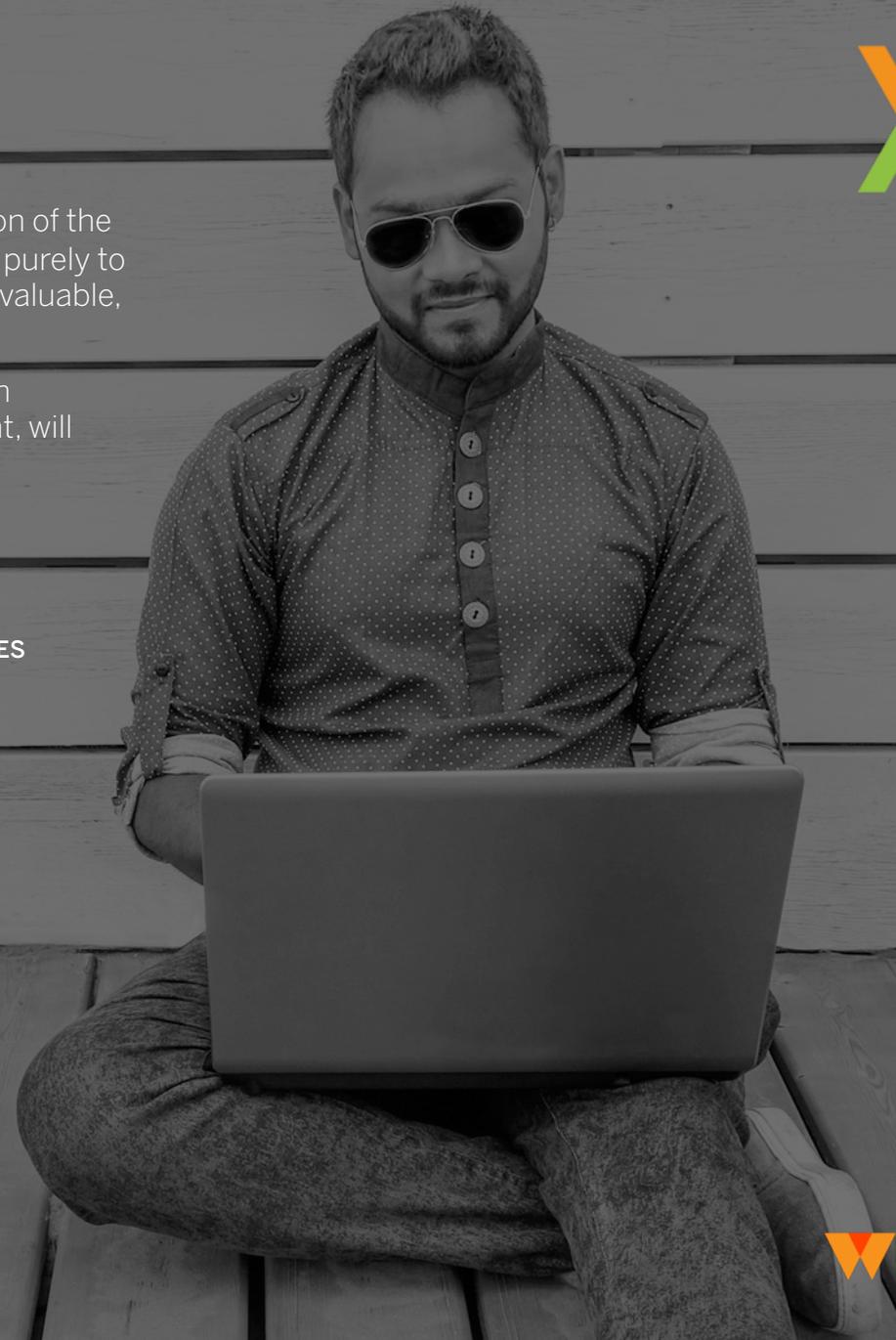
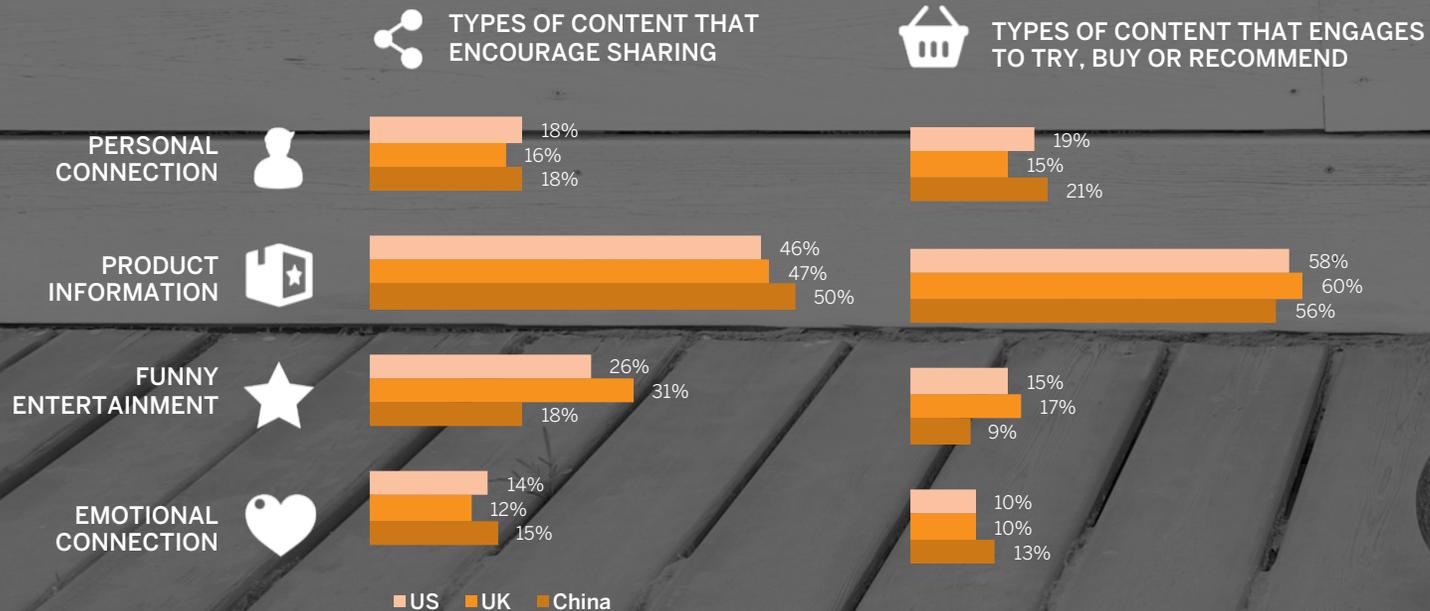
Brands must also consider the opportunities to drive the motion of their customers through unintentional searches – ‘casual’ content and story encounters. Whilst intentional searches yield greater impact than casual encounters, these serve to build an important base perception across everyday interactions on retail and news sites. To this extent, our data suggests that this will require brands to understand the importance and the value of content that is focused on forging a connection over the need to sell.



IMPACT OF MOTION: THE ROLE OF BRANDED CONTENT

The role of branded content in driving motion is dependent on the search and discovery motivation of the individual. When a consumer is on the journey to sale, the information they are looking for relates purely to the product or service. In this instance motion can be maximised if the content is product driven, valuable, functional and actionable. In essence, it needs to be intrinsically tied to driving a sale.

If consumers are not in the intentional purchase mind-set, content that is designed to generate an emotional response from the audience, especially if the desired response is laughter or enjoyment, will have the greatest impact.



IMPACT OF MOTION: INFLUENCE IS IN MOTION

Recommendations from peers, family and friends will drive an increase in shares of product information



User reviews on retailer sites key to influencing intentional searches



Everyday people trusted the same as, if not more than media reviews



The level of impact that traditional and high profile social media influencers have on influencing, driving action or informing the purchase decision of your audiences has evolved. The multiplicity of devices, channels and content means that the reach and impact of influencers is shifting with consumers own intentional and unintentional searches.

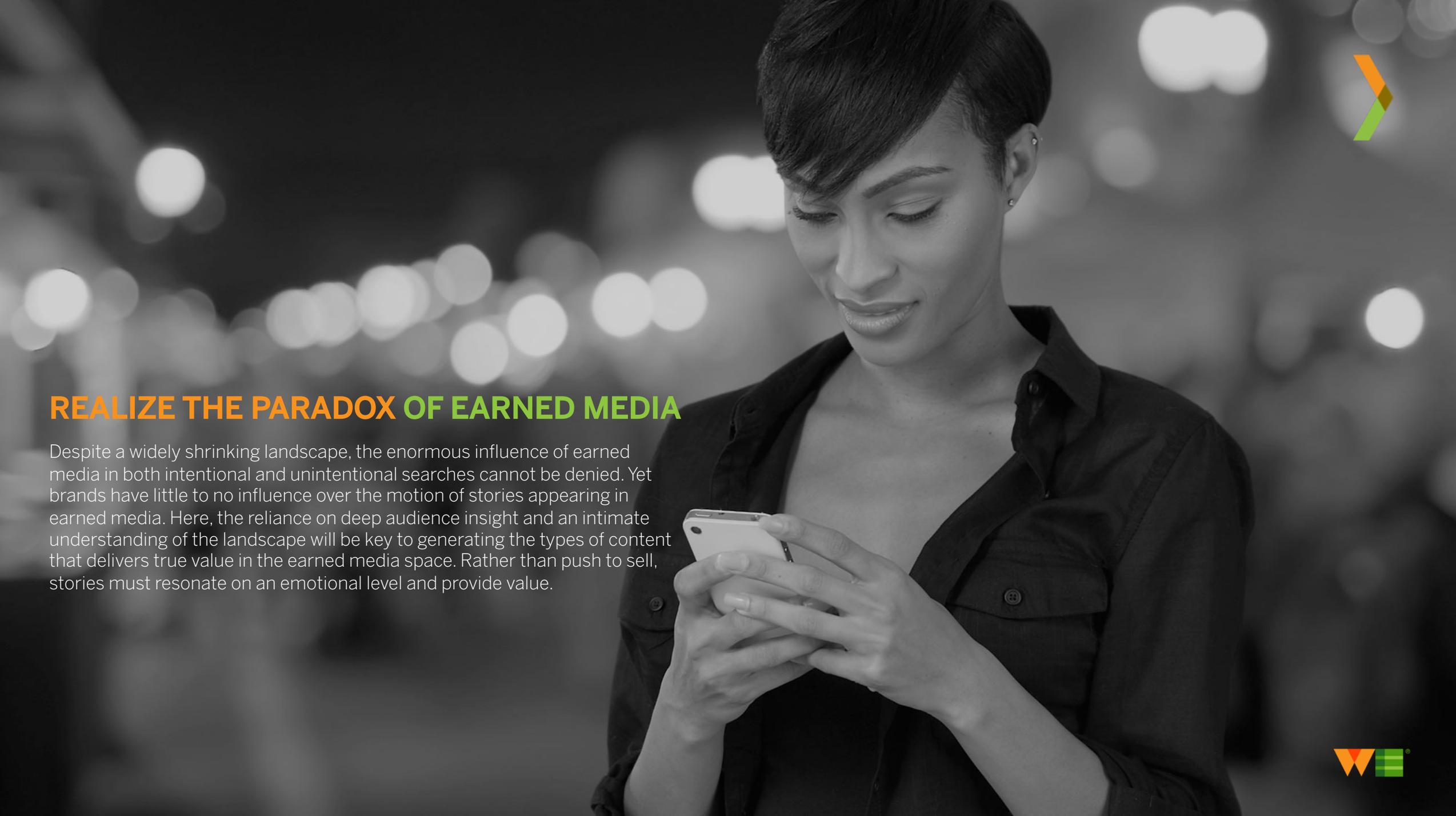
When in the early stages of the brand engagement, or when engaging with unintentional searches, traditional, established media is still the most impactful. As consumers get closer to the point of purchase recommendations from their peers - family, friends and acquaintances - will have greater impact than those from traditional or high profile social media influencers.

It is here that brands will have more success in driving motion when engaging at a level where influencers may not have the largest following, but the level of influence they have on their network is highly effective.





SO
WHAT?



REALIZE THE PARADOX OF EARNED MEDIA

Despite a widely shrinking landscape, the enormous influence of earned media in both intentional and unintentional searches cannot be denied. Yet brands have little to no influence over the motion of stories appearing in earned media. Here, the reliance on deep audience insight and an intimate understanding of the landscape will be key to generating the types of content that delivers true value in the earned media space. Rather than push to sell, stories must resonate on an emotional level and provide value.



PLAN THE UNPLANNED

Another key outcome of the paradox of earned media is the lack of control brands have on when earned media endorsement can appear. Brands need to be savvy and have plans in place so when you land an earned media spot, you can immediately amplify across multiple devices and channels. When done in a timely manner, brands can massively impact the velocity of their brand story, and in turn, drive greater propensity to buy.



ENGINEER THE CASUAL ENCOUNTER

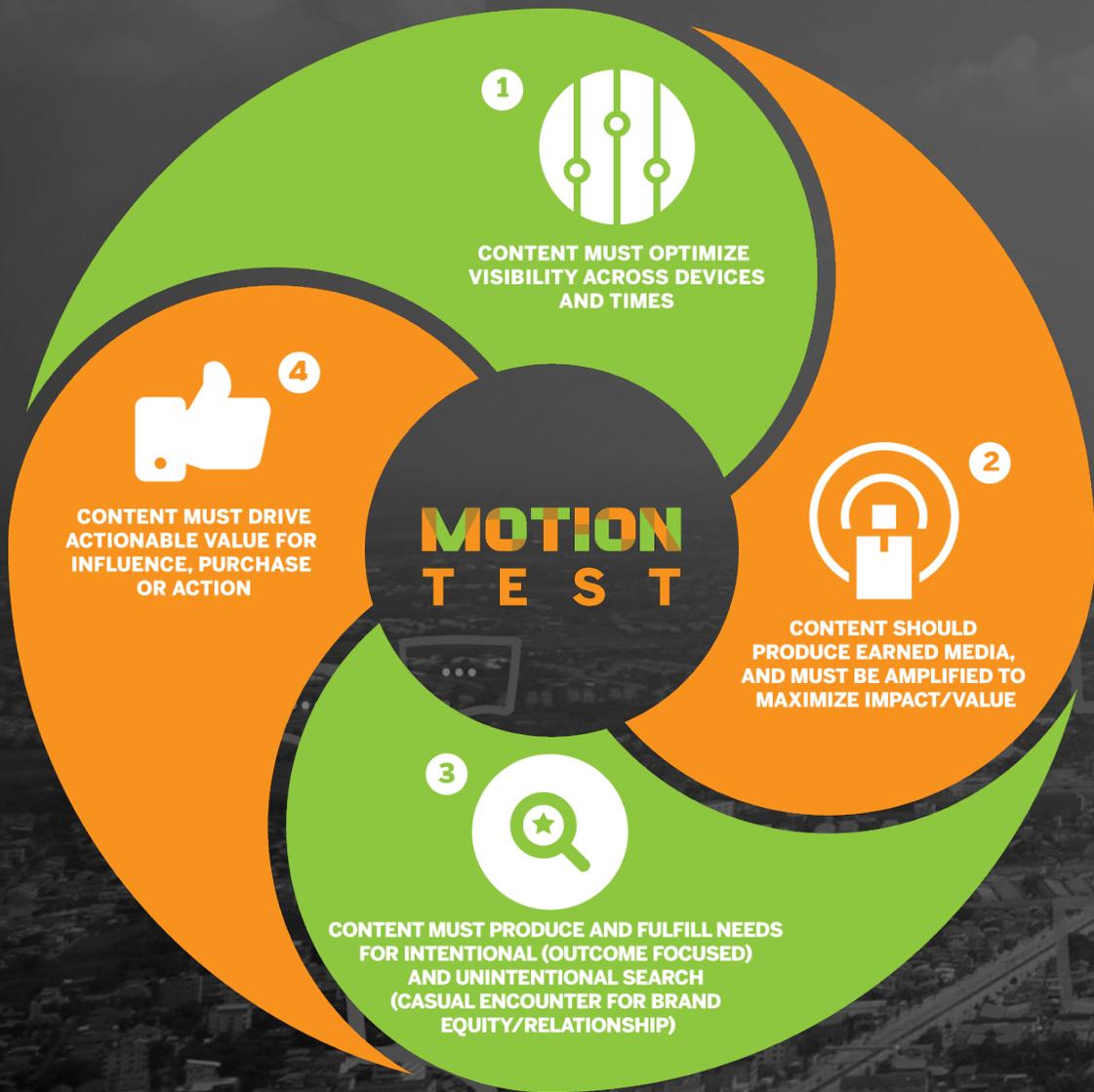
People experience your brand in multiple ways. What we tend to place the most importance on is driving intentional awareness when in actuality, unintentional interactions can have as much if not more influence on getting consumers to engage with branded content.

If you get the unintentional search and the casual encounter right, then it doesn't matter where a person enters the funnel. As long as a sufficient number of positive signals are pushed out into the right placements and are experienced as 'casual encounters', this will drive a greater propensity for consumers to lean towards your brand.

However, once in the funnel, you need to ensure that all of the relevant hygiene factors of clear, concise product information through to relevant user and influencer reviews are visible in order to drive your audiences to sale.

CLUTTERED
UNUSUAL
OPPORTUNITIES
SIGNALS
TOWARDS
BRAND





Pass “The Motion Test” - does it play to the motion of your audience

Call us. We can help you understand the motion of your brand and its trajectory.

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