Build both brand salience and loyalty

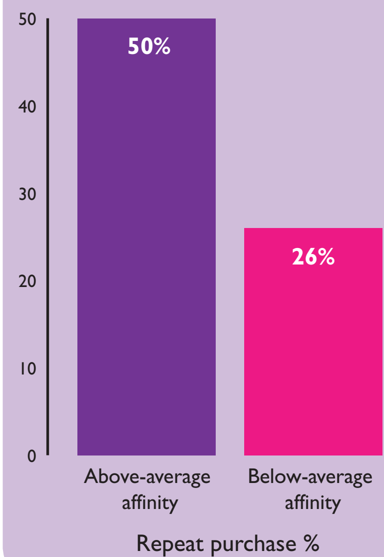
Marketers can't just pick one side in the loyalty or salience debate. Building salience and creating a brand positioning that drives affinity are both key to maximising marketing effectiveness. **Josh Samuel** of **Kantar Millward Brown** discusses the benefits of building a strong emotional connection with consumers

Brand love has been a hot topic in brand building for decades. And it's a divisive topic. On one side is the concept of 'Lovemarks', first publicised by Kevin Roberts, which seeks to build brands that "create loyalty beyond reason, requiring emotional connections that generate the highest levels of love and respect". On the other side, Professor Byron Sharp, author of the book *How Brands Grow*, and his associates at the Ehrenberg-Bass Institute believe seeking brand love or emotional attachment is a waste of time and does not contribute to growth. But as so often is the case, the truth lies somewhere in the middle of these two extremes. Brand growth is certainly not all about love, but building positive feeling towards brands does drive growth.

Central to the Lovemarks philosophy is the idea that if you can get people to truly love your brand, they'll buy it more often, and that increased purchase frequency will deliver market share growth.

However, the Ehrenberg-Bass Institute argues that rather than being dependent on the love of a small segment of loyal buyers, purchase frequency has a law-like relationship with the penetration of a brand (the percentage of people who buy it at all). So the more people that buy a brand, the higher the brand's average frequency of purchase will be. Therefore, the Ehrenberg-Bass Institute claims that it is extremely rare for successful brands to increase purchase frequency among current buyers without also growing penetration by recruiting new buyers.

FIGURE 1: PERCENTAGE OF BUYERS WHO REPEAT PURCHASE IN THE FOLLOWING NINE MONTHS



Source: Combined Kantar Millward Brown survey data with 18 months of Kantar Worldpanel purchase behavioural data

The implication is that attempting to build a group of fanatical lovers to buy your brand at very high frequency won't deliver significant, sustainable growth. However, this does not mean that consumer feeling towards brands has no role at all in driving growth.

BRAND AFFINITY

When it comes to brand attitudes that drive growth, it's not really about true love. It's about affinity. Liking, not loving. Very few people truly love brands in the way they love their families, their dogs, or even their sports teams. But lots of people do 'like' brands. Past purchase and usage behaviour certainly feed brand affinity: the more someone uses a brand, the more familiar it becomes, and usually the more they like it. Past usage isn't the only factor, however. If it were, we would expect all brands in a given category to have the same relationship between past frequency of purchase and affinity.

In fact, different brands generate very different levels of affinity per purchase – a measure of how much affinity people have towards the brands they buy, relative to how frequently they buy them. This means that brand affinity is not just an outcome of past purchase, as others have claimed.

In 2015, Kantar Millward Brown and Kantar Worldpanel teamed up to explore the relationship between brand equity and purchase behaviour, by posing questions about brand attitudes, perceptions and salience, for instance, to shopper panellists for whom we have purchase data. This allows us to quantify the level of affinity consumers have for every brand they purchase. In four pilot studies, covering thirty-four brands, we found that different brands achieve vastly different levels of affinity per purchase, and this variation bears no clear relationship to

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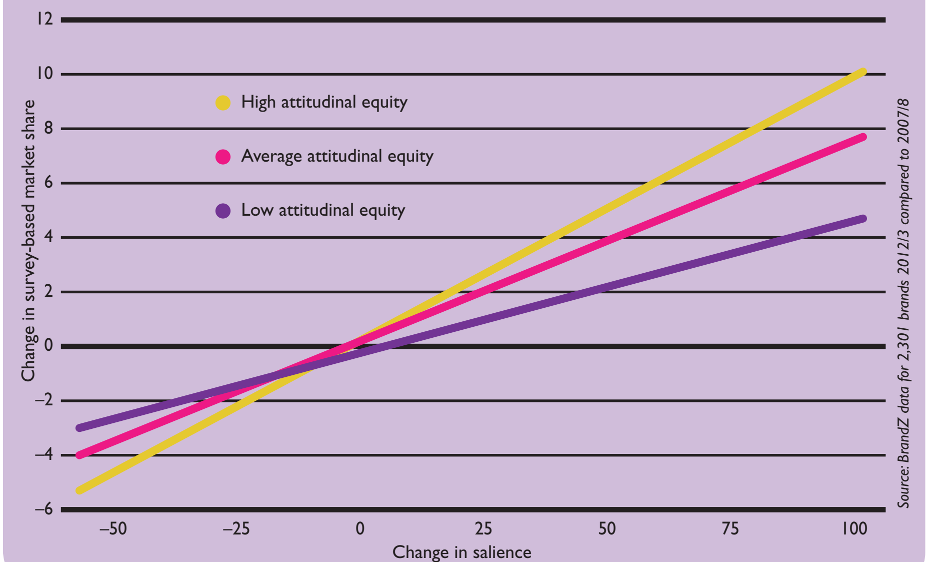
FIGURE 2: RELATIONSHIP BETWEEN BRAND MARKET SHARE GROWTH AND SALIENCE GROWTH



brand size. This proves that attitudes cannot purely be driven by past purchase behaviour. Some brands successfully build consumer affinity much more effectively than others through a purchase cycle.

This, in itself, doesn't prove that brand affinity is important; it just shows that some brands can inspire affinity more effectively than others. But using that same data, in a category for which we have purchase data for the nine-month period prior to the survey, and nine months after the survey, we are also able to show that brand affinity predicts changes in purchase behaviour.

As illustrated in Figure 1, 50% of pre-wave brand buyers with above-average affinity for the brand repeat their purchase in the nine-month post period. This is nearly twice the repeat purchase rate of pre-wave buyers with below-average affinity, 26% of whom repeat purchase. This result holds true even when you adjust for pre-wave purchase frequency, so we know it isn't just due to an overrepresentation of heavy buyers in the group with high brand affinity.

These two results, taken together, indicate that affinity does influence future purchase behaviour, and some brands build affinity more effectively than others, suggesting it is a reasonable strategy to try to leverage affinity to drive growth.

BRAND SALIENCE

The ability to predict changes in purchase behaviour is further enhanced by combining affinity with other attitudinal survey measures. Specifically, combining affinity with consumers' evaluation of a brand as meeting their needs and being different to competitors improves the ability to predict changes in purchase behaviour. In fact, this combination of affinity, meeting needs and difference gives an overall measure of attitudinal equity that goes beyond just predicting purchase volumes. Consumers who score brands more favourably on this measure of attitudinal equity pay a higher average price for them, helping those brands to justify a price premium.

But none of this matters much if the brand is not top of mind with consumers in buying situations (salient) – which Ehrenburg-Bass and Byron Sharp would argue is all it needs to grow. We find that as salience grows, so does market share (Figure 2).

Figure 2 shows the relationship between market share growth and salience growth over a five-year period for thousands of brands in the BrandZ database. As can be seen, there is a clear relationship between the two, supporting the idea that salience is the key brand growth lever. However, when we split the brands into those that start the five-year period with strong scores for attitudinal equity (above the level expected given their size) versus those with average or weak scores, we clearly see the role that attitudinal equity – with brand affinity at its core – plays in accelerating the growth that comes from increased salience.

While salience may help to drive growth, brands for which consumers feel an affinity, do grow faster, because people who like a brand are more likely to try to, or actually, repurchase it, and are more likely to pay

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the requested price. Brand owners should therefore seek to build consumer affinity and differentiate their brands, but in doing so should target all category buyers, not just a small group of hardcore brand 'lovers'.

BRAND ENHANCEMENT

It's all very well to show that how people feel about brands drives their purchase decisions, accelerates growth and supports a price premium, but that counts for little unless the marketer can actually influence brand affinity. As discussed earlier, some brands do achieve markedly greater brand affinity per purchase than others, but not overnight. In fact, brand affinity is quite slow to change, often taking several purchase cycles to shift at all, and several years for substantive movements.

This stands to reason, because while building salience can simply be a case of reminding consumers about the brand, growing affinity means developing emotional connections and changing perceptions. It is unlikely that these changes will come only from watching an ad. Although we do see it happen on occasion, it's much more likely that the effect of advertising on brand affinity works through the 'enhancement' mechanism.

Enhancement, first observed experimentally in the 1990s, is a process whereby advertising positively frames consumer expectations of the experience of using the brand. The enhancement effect is one of the few empirically supported theories of how advertising works that can explain the variation we see in how effectively different brands generate affinity per purchase, and the role that affinity plays in accelerating long-term growth.

Enhancement in advertising works by emphasising the functional benefits and/or suggesting potential higher-order benefits of using a product or service. The memories of advertising may help nudge the consumer to buy a brand next time but, more importantly, these advertising messages come to mind when the consumer next tries the product or service, framing that usage experience and cementing those strong brand perceptions to feed more strongly into the next purchase decision.

MARKETING STRATEGY

The inconvenient truth that this presents for marketers is that they can't just pick one side in the love or salience debate. Building salience and creating a brand positioning that drives affinity are both key to maximising marketing effectiveness.

The good news, though, is that there doesn't need to be a conflict between these two ideas. Sophisticated marketers are already bringing together the ideas of Byron Sharp on how to build salience, with their process for defining brand positioning. Essentially, this means defining brand positioning to act as a foundation for distinctive and engaging advertising that builds salience. Even in these cases though, there is a risk that marketers are still 'taking a side', by considering their brand positioning as purely a means to grow salience, while failing to recognise that driving affinity is a desirable goal in and of itself.

Marketers should aspire to find a positioning that consumers feel positive about and think is different to their competitors. Only then will they also differentiate the brand and build affinity to help optimise the revenue return they get from growing salience.

Does any of this matter? If you're asking yourself whether there's any difference between a brand positioning that aims to differentiate a brand and make it more likeable, and one that can help drive salience, think of some of the most creative and effective advertising campaigns.

Would these campaigns have been effective if the only marketing goal for the brands had been salience? Would Stella Artois have put investment behind its 'Reassuringly expensive' campaign of the late 1990s? Would Guinness have pursued 'Good things come to those who wait', and produced the famous surfer ad? Would Red Bull have sent a mad spaceman plummeting to Earth? Would we have the long-running 'Mini Adventure' campaign, and the more recent, digitally infused 'Not normal' Mini campaign? In fact, would the modern incarnation of the Mini brand exist at all, if consumer affinity were not a brand objective? These great campaigns undoubtedly did make the brands more salient, but they also accelerated growth by shifting perceptions of the brands to be more meaningful to consumers.

The most effective advertising is made when marketers strive to do more than just remind consumers that their brands can be used in different circumstances. Not only does this place the brand front of mind with consumers, it also makes it just a bit more lovable to accelerate growth and support a price premium.

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