NAVIGATING THE NEW LANDSCAPE

BRANDS AND MEDIA IN 2021

BRANDS2 LIFE

MEDIA Measurement

TABLE OF CONTENTS

MEDIA MEASUREMENT

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FOREWORD

As a PR and communications agency with a team and a client base that places immense value in the power of the mainstream media, we are delighted to be partnering with Media Measurement to produce this ground-breaking research report.

The media landscape has changed and continues to change fast in the UK through a combination of declining readership, the commercialisation of the relationship between brands and the media, and, crucially, the emergence of a number of 'mega' issues such as Brexit, Climate Change and, of course, COVID-19.

This report takes a helicopter view of the UK media through the lens of some of the world's biggest brands and analyses how their presence in the media, and the topics they are associated with, has evolved over the last five years and how it could evolve further in the future.

The conclusions are fascinating. They may not be surprising in themselves but the data Media Measurement has produced to justify them has rarely been seen before in this form.

In particular the report demonstrates how important it is for brands to put authentic purpose at the centre of their communications if they want to engage readers and generate positive coverage.

As businesses start to re-assess their public relations strategies for a post-pandemic world we hope that this report will prove a useful guide for business and communications leaders alike.

GILES FRASER
CO-FOUNDER, BRANDS2LIFE

#1 INTRODUCTION

Over the last five years, huge issues, such as Brexit, Climate Change and more recently COVID-19, have dominated the media agenda. As a consequence, it has become harder for brands to cut through in this media environment to generate proactive and prominent coverage in the way many have in the past. The aim of this research is to test whether these observations hold true, and what the outlook is for the coming years, by analysing trends in data relating to the presence of big issues, and of brands, in media coverage since 2015.

Of course, for brands aiming to drive successful coverage, the media agenda is only one consideration. It is also important to understand how readers respond to news, particularly around social issues that can be divisive. Therefore this research also analyses social media engagement with media coverage, to unpick whether reader interests are aligned with the media agenda and what this means for brands.

Finally, we share some best practice guidance to provide insights on how brands can thrive in this media landscape, generating prominent coverage that resonates with readers.

Our analysis focuses on the following key questions:

Have brands lost share of voice in the media? [#4.1]

How dominant have big issues been in the UK media over the last five years and is the trend expected to continue? [#4.2]

What media content do readers engage with in relation to brands and big issues? [#4.3]

Is there a crossover between the two – are brands leveraging the big issues and does this drive reader engagement? [#4.4]

What best practice examples can we learn from that create a blueprint for best-in-class communications for 2022? [#5]

#2 METHODOLOGY

Our analysis focused on analysing media coverage from 1st June 2016 to 31st May 2021, but in some sections we have included data back to 1st Jan 2015 to understand any differences from before the EU referendum in the UK.

The analysis included online news articles from 25 leading UK- and US-based media outlets, with a particular focus on business media (see Appendix 1 for details).

Data was collected via a media monitoring tool (Meltwater) using Boolean searches to identify media coverage relevant to our research questions. Further details on these searches and the related metrics can be found in Appendix 2.

Definitions of terms used in the report can be found in Appendix 3.

#2.1 THE BRANDS

As a filter, we analysed the coverage relating to 15 top brands, selected based on their ranking in BrandFinance's Brand Directory list of top brands by value in 2021.

TOP GLOBAL BRANDS

TOP UK BRANDS

Where we refer to findings about 'brands' in this report, we are referring to analysis of media coverage referring to these fifteen brands.

#2.2 THE ISSUES

Through desk research and media content analysis, we identified 17 core issues that were on the media agenda during the analysis period. When we refer to 'big issues' in this analysis, we are referring to these issues:

- BREXIT/EU REFERENDUM
- COVID-19
- CLIMATE CHANGE
- SUSTAINABILITY
- FAIR TRADE & ETHICAL SUPPLY CHAINS
- WOMEN'S RIGHTS
- LGBTQ+ RIGHTS
- TECHLASH
- FUTURE OF WORK
- RACIAL JUSTICE & EQUALITY
- MIGRANTS & REFUGEES
- ARTIFICIAL INTELLIGENCE
- CRYPTOCURRENCY
- BIG DATA
- MENTAL HEALTH & WELLBEING
- DOMESTIC POVERTY
- CORPORATE TRANSPARENCY

Please see Appendix 4 for details of further categorisation of these issues into sub-themes (e.g. social issues, people's rights, technology issues and business issues).

#3 KEY FINDINGS

#3.1 HAVE BRANDS LOST SHARE OF VOICE IN THE MEDIA?

Our analysis indicates that the overall number of articles published online by leading media outlets has fallen by more than a fifth since 2015, leaving brands competing over less media space. So while our data shows that brands have appeared in a fairly consistent proportion of articles over the last five years, the actual number of articles mentioning brands has decreased by more than a quarter.

On top of this, brands are less likely to feature prominently in articles now than five years ago, with prominent mentions down by more than a third. Over the last three years in particular, the proportion of proactively driven brand coverage has decreased, down by a fifth.

Our analysis indicates that one of the key tactics for driving proactive coverage - producing research and surveys - generates over two-fifths less media coverage compared to five years ago.

Article volume is down by more than a fifth due to editorial decline and gaining prominent and proactive brand coverage is much more competitive than before.

#3.2 HOW DOMINANT HAVE BIG ISSUES BEEN IN THE UK MEDIA OVER THE LAST FIVE YEARS AND IS THE TREND EXPECTED TO CONTINUE?

It will come as no surprise to hear that COVID-19 has been incredibly dominant in media coverage from 2020-21, accounting for two-fifths of all articles, and that Brexit also generated a chunky 5% of coverage over the last five years. When we exclude these issues, our analysis still shows a steady increase year-on-year since 2015 in the proportion of all media coverage that refers to social issues (+5pp since 2015).

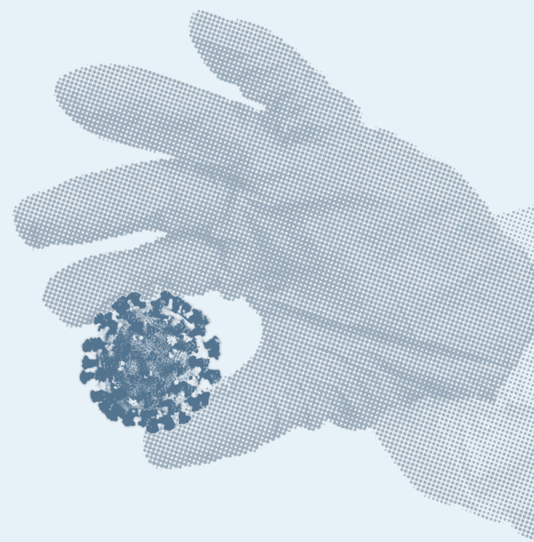
We see a number of other issues have come to the fore in the last year, such as Racial Justice and Equality, Mental Health and Wellbeing, Climate Change, the Future of Work and Artificial Intelligence (AI).

We expect COVID-19 to continue to dominate media coverage throughout the second half of 2021, though the extent of this dominance will depend on the trajectory of the pandemic. Regardless, around a third of all content as a minimum is likely to reference the ongoing global crisis.

We saw media attention related to Climate Change fall in the early days of the pandemic, after surging in 2019, in no small part due to activism from young climate protesters led by Greta Thunberg and the Extinction Rebellion movement. Despite this, our data indicates the issue quickly recovered its upward momentum.
With public climate protests resuming, COP26 due to take place and Climate Change making it onto the agenda for governments' and businesses post-pandemic recovery plans, we expect the issue to increase its presence in the media agenda in 2021 and beyond. The UK Government in particular has committed to ambitious targets for reducing carbon emissions, which is likely to drive increased scrutiny around authentic action from brands.

The three other key areas where we expect to see a growing focus by the media in the rest of 2021 and into 2022 are People's Rights, Mental Health & Wellbeing and the Future of Work.

Big issues have been increasingly dominant in the U.K. media over the last five years. Even taking the behemoth of COVID-19 out of the equation, social issues are rising up the media agenda and trends are not set to slow down.



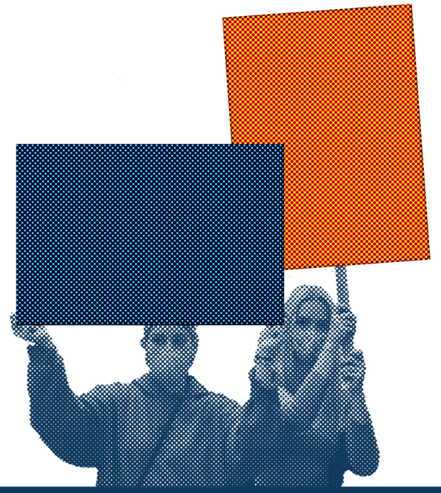
#3.3 WHAT CONTENT DO READERS ENGAGE WITH IN RELATION TO BRANDS AND 'BIG ISSUES'?

Our analysis of the most engaged with articles about key issues, and separately, about brands, indicates that media coverage driving high engagement often has an individual personality as its focus. While Jeff Bezos was often at the forefront of Amazon articles driving high engagement, Greta Thunberg was a regular feature in the most engaged with content referring to Climate Change.

We also saw evidence that negative or shocking articles tended to drive the most reader interaction. This was evidenced in the high levels of engagement with articles detailing large case numbers and death tolls in the COVID-19 pandemic. Similarly, articles focusing on shocking statistics about global warming, ice caps melting and sea levels rising received more engagement than those focusing on positive actions to fight Climate Change.

We saw the strongest cut-through for brands in the overall most engaged with articles on the topics of Racial Justice and Equality, and the Future of Work.

Big personalities and shocking statistics drive strong reader engagement.



#3.4 ARE BRAND COMMUNICATIONS BECOMING MORE PURPOSE-LED AND DOES THIS DRIVE READER ENGAGEMENT?

Brands are seeing increases in overall and proactive coverage relating to big issues, but on topics such as Climate Change, brands are failing to leverage the opportunity to lead narratives.

There has been a steady year-on-year rise since 2015, in articles that mention brands in relation to the 'big issues' explored in this research. COVID-19 was hugely dominant in brand media coverage from late January 2020 to May 2021. Our data showed that a third of proactive and prominent brand articles referred to COVID-19 since the start of the pandemic in January 2020. Even in May 2021, over a fifth of such coverage mentioned COVID-19.

If we focus on social issues, but exclude the dominant topic of COVID-19, we still see an increase in the proportion of brand articles referring to these issues both overall (+10pp from 2015) and in proactively driven content (+9pp from 2015).

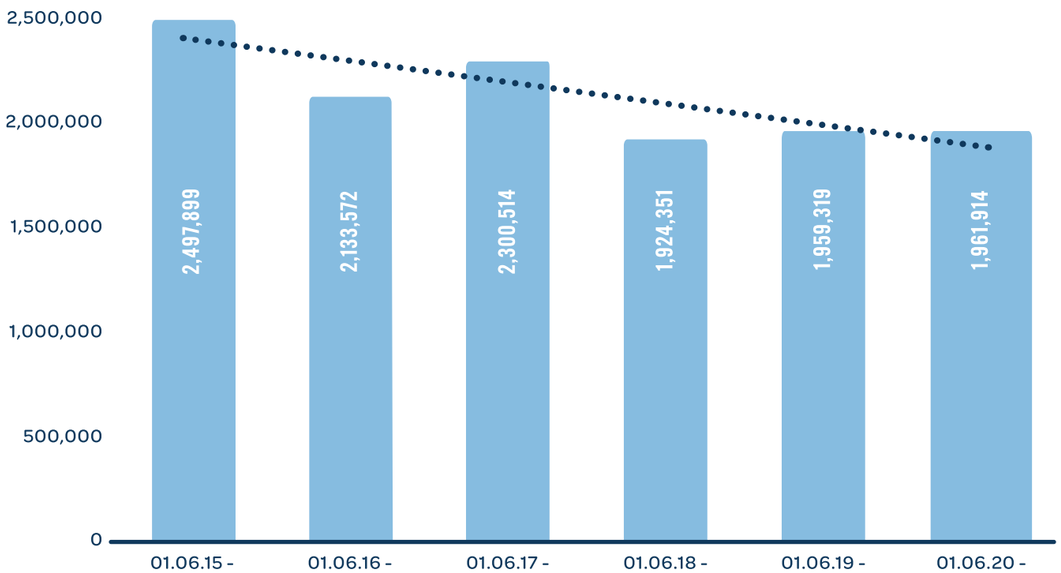
For Climate Change, while there is a strong increase over time in articles referencing brands in relation to the topic, proactive brand coverage is not keeping pace. This indicates there is an opportunity for brands to play a greater role in the Climate Change debate through proactive outreach.

Our analysis shows significant reader engagement with social media posts sharing links to articles that mention brands and social issues, indicating a strong interest from readers in understanding the actions of brands on these issues. However, brands should be aware that reader reactions to media coverage about social issues can be highly polarised. In some cases, articles with a broadly positive sentiment towards a brand generated strongly critical responses from readers in social media. We also observed instances where the same content published by two outlets with a different audience demographic generated wildly different responses on social media. While we don't suggest brands should avoid, or tip-toe around social issues, they should anticipate, and in some cases respond to, negative feedback from some circles when taking action.

#4.1 HAVE BRANDS LOST SHARE OF VOICE IN THE MEDIA?

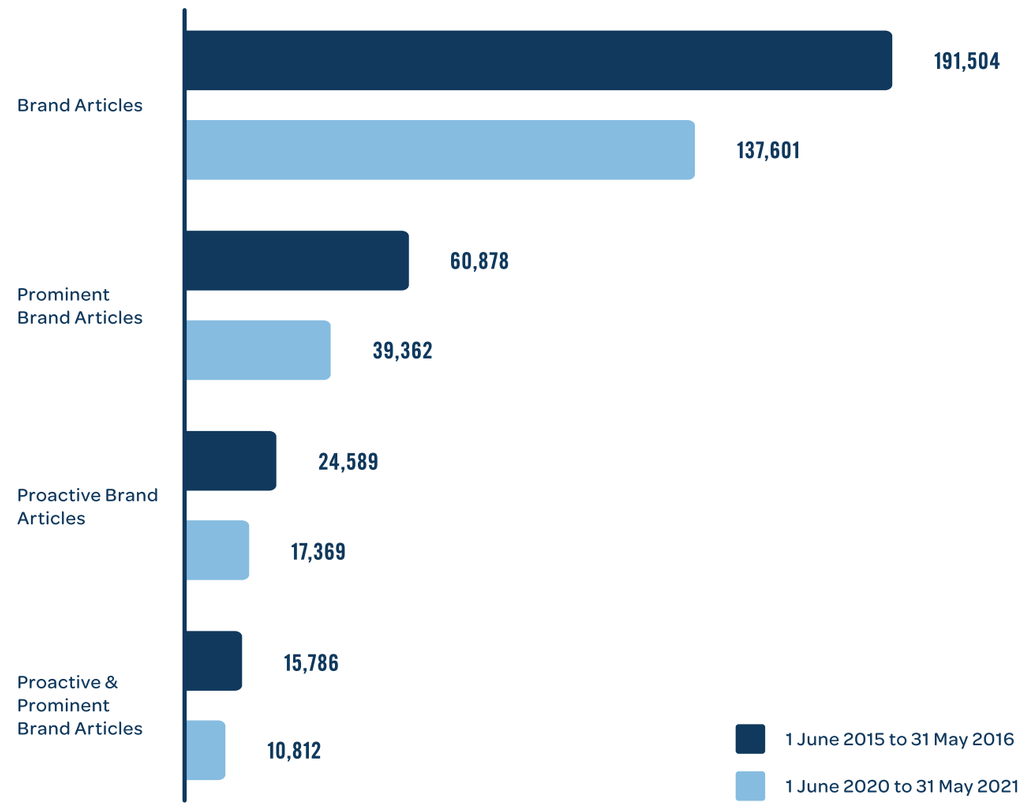
Our analysis shows that brands are competing over less space in leading media outlets. The number of articles published by the media outlets included in this study has been decreasing, from a peak of 2.5 million in 2015/16, to around 1.9 million in 2020/21, a fall of 21%.

Figure 1. Overall volume of articles in leading media outlets (1 June 2015 to 31 May 2021)



There is evidence that outlets are more selective about what they publish, and may be impacted by ongoing pressures on income as print media declines. Our data is supported by evidence that outlets such as The Guardian have taken a strategic decision to reduce its output, in response to analytics data indicating that some articles had very few readers. By reducing output by a third, the publication states that this actually increased traffic. In a discussion on what type of articles were dropped from the publication, Chris Moran from The Guardian indicated these tended to be pieces that were covered without any passion from the editorial team, with a focus on 'meaningful' journalism. However, this leads to more competition for brands to generate media coverage.

Figure 2. Total brand articles by type - 2015/16 vs. 2020/21

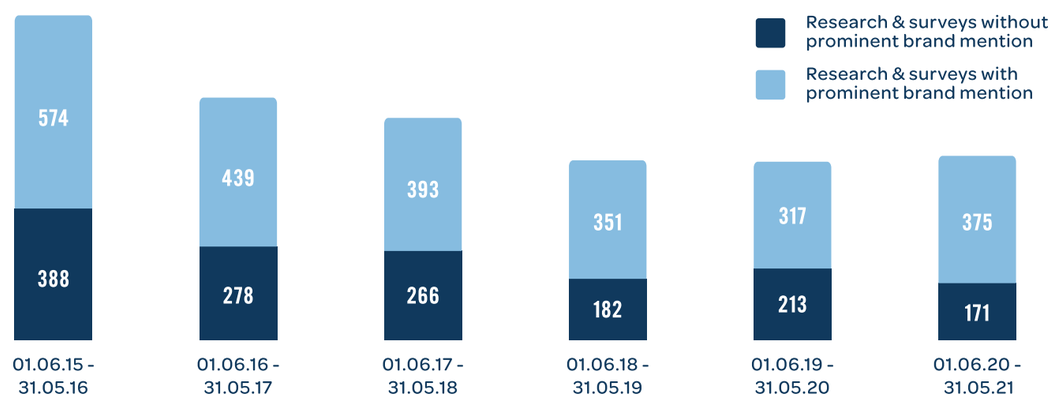


The last two years have been particularly tough for generating prominent and proactive brand coverage because the volume of available article space has decreased. While brands are mentioned in a fairly consistent proportion of articles (between 6% and 8% of all articles), the number of articles mentioning brands has fallen from 192K in 2015/16 to an average of 137K in the three years between 2018/19 and 2020/21.

As well as seeing decreasing volumes of coverage, brands also generate less prominent mentions in articles now than 5 years ago (-35%).

The last three years, and particularly the last 12 months, have been tough for brands; the volume of proactively driven coverage has decreased (-20%), and where proactive coverage is achieved, it is less likely to include a prominent mention of the brand (-26%).

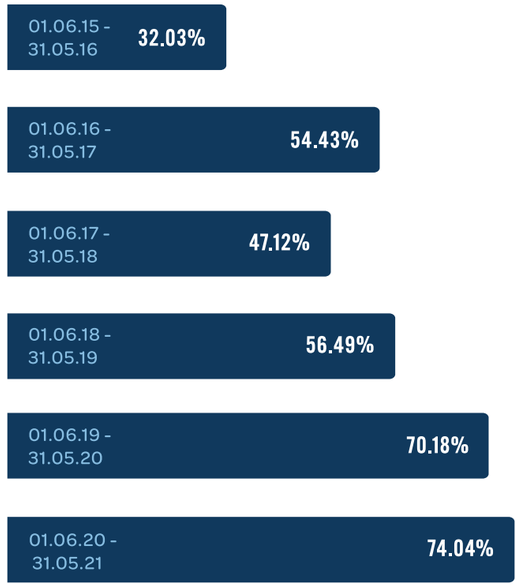
Figure 3. Volume of brand articles generated by research & surveys (prominent and non prominent brand mentions)



Research and surveys as a driver of proactive coverage for brands is in decline; the number of articles generated by this approach reduced by 44% from 2015/16 and the number of articles driven by research and surveys with a prominent mention more than halved (-55%).

In a climate where research and surveys are generating less coverage for brands overall, those who have a reputation for strong research can see their proactive coverage fall. EY is a good example of this; the brand saw their proactive coverage drop from 918 articles in 2015/16 down to 235 items in 2020/21. During this time, the proportion of EY's proactive coverage driven by research and surveys increased from 32% to 74%. Brands should of course capitalise on their strongest assets, of which excellence in research can be one, but we would recommend avoiding over-investing in research and surveys as a tactic given the lower prevalence of this type of brand coverage since 2019.

Figure 4. Proportion of EY proactive coverage referencing research & surveys (2015-2021)



#4.2 HOW DOMINANT HAVE 'BIG ISSUES' BEEN IN THE UK MEDIA OVER THE LAST FIVE YEARS AND IS THE TREND EXPECTED TO CONTINUE?

WHAT IS THE TREND IN MEDIA COVERAGE OF 'BIG ISSUES' SINCE 2015?

Big issues have increasingly dominated the media agenda over the last five years; since 2015 there has been an increase in the proportion of media articles in leading outlets referring to the 'big issues' tracked in this study. Brexit, and in the last 17 months, the COVID-19 pandemic, have been the leading drivers of that coverage.

Figure 5. Proportion of all media coverage referring to issues by year

YEAR	ALL ISSUES	SOCIAL ISSUES	SOCIAL ISSUES EXC. COVID & BREXIT
2015	7%	6%	6%
2016	11%	10%	7%
2017	13%	11%	8%
2018	15%	12%	8%
2019	18%	16%	9%
2020	51%	50%	10%
2021*	44%	42%	11%

**2021 includes 1 January to 31 May 2021*

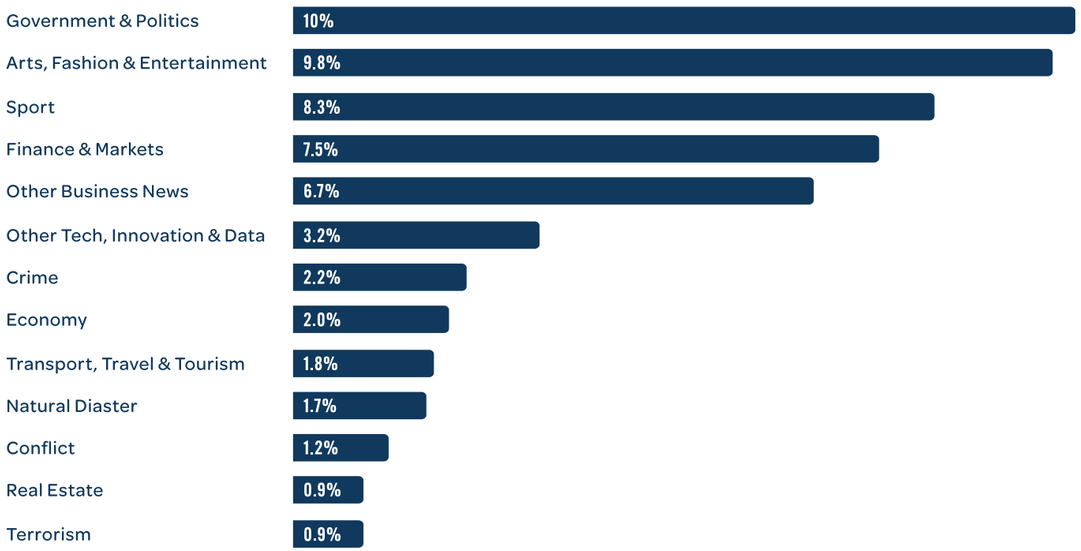
Brexit accounted for 5% of all media coverage in the five years since June 2016 in leading media outlets. COVID-19 was mentioned in 43% of articles in 2020, and 34% of articles in 2021 (to the end of May 2021).

However, even excluding these two dominant issues, and focusing on social issues (excluding also technology and business related topics) we see the proportion of articles mentioning these increase from 6% in 2015 to 11% in 2021. This demonstrates a clear shift in the media landscape brands are operating in.

11% of articles referenced social issues in 2021 (excluding Brexit and COVID-19), up from 6% in 2015.

WHAT ELSE IS ON THE NEWS AGENDA?

Figure 6. What else did the media outlets report on in 2021?



Excluding the 'big issues' tracked in this research, which accounted for 44% of media coverage in the leading outlets, the prominent topics in 2021 (to end of May) were Government and Politics (10% of articles), Arts, Fashion, and Entertainment (10% of articles), and Sport (8% of articles).

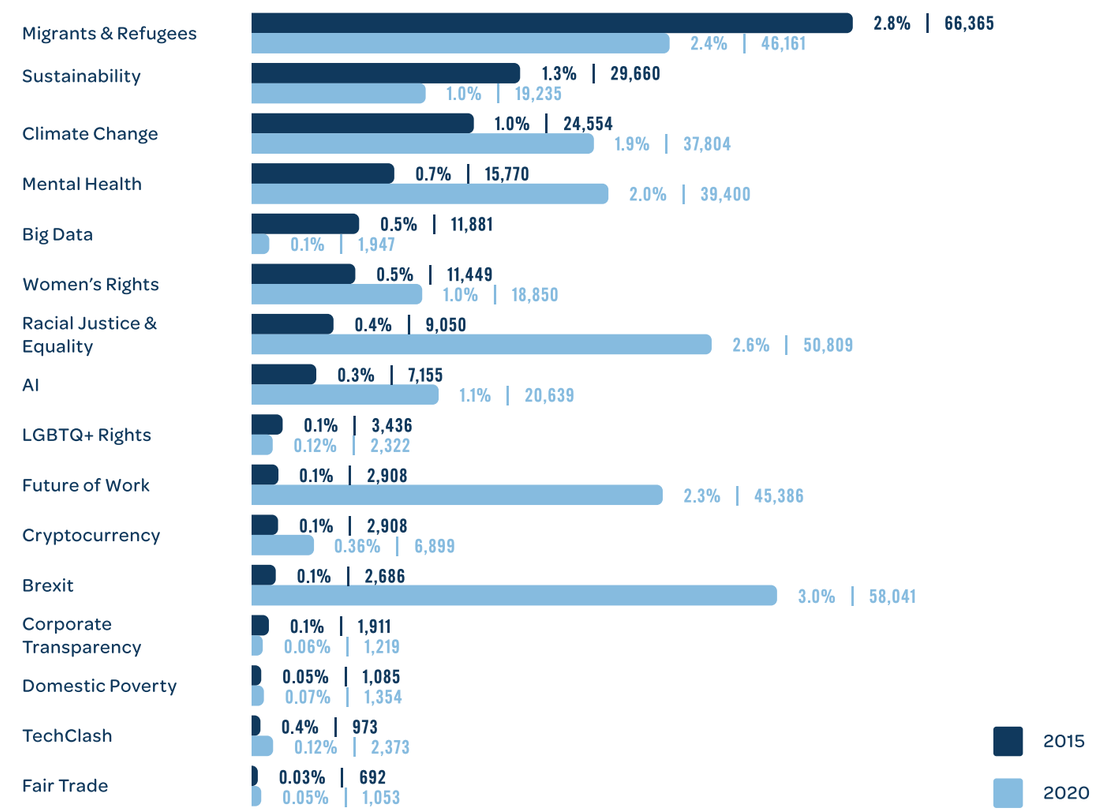
Finance, Business, Technology and the Economy account for a combined 19% of coverage. This topic area is where brands are most likely to feature-in and influence media output; that is, apart from brands in the analysis with a direct link to Arts, Fashion & Entertainment, such as Amazon (as a publisher/producer/seller), or brands with a strong history of sports sponsorship, such as Barclays.

Some of the topics (Government and Politics, Crime, Natural Disasters, Conflict, Terrorism) are to a large extent off limits or undesirable as a platform for driving brand media coverage.

Given that this research indicates that brands are faced with shrinking output from the major media outlets, and are finding it more challenging to achieve prominent and proactive coverage, we posit that the social issues, business issues and technology issues identified in this report represent the best opportunity for brands to grow their presence and also drive positive reputation through purpose led content.

WHICH ISSUES WERE MORE PROMINENT IN MEDIA DEBATE OVER THE PAST FIVE YEARS?

Figure 7. Volume & proportion of issues coverage by topic 2015 vs. 2020 (excluding COVID-19)

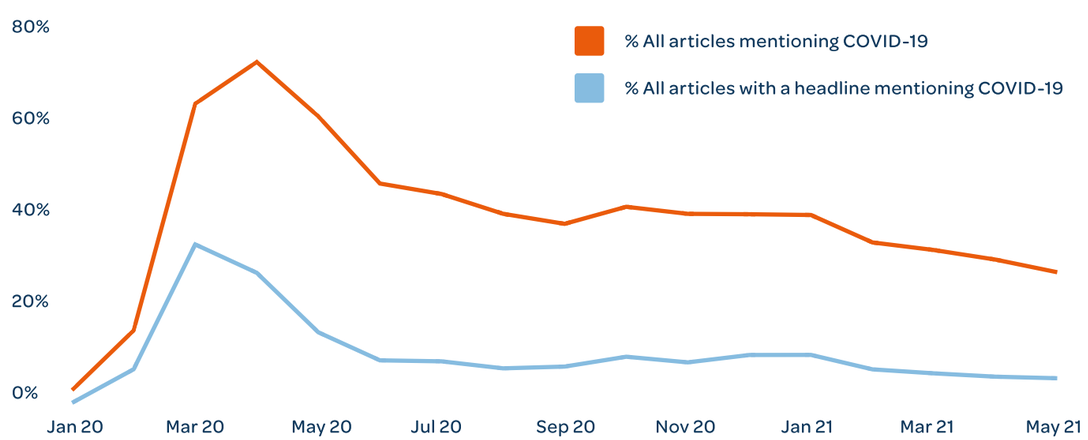


We see large differences in the issues which led the media agenda in 2015 vs. 2020; there has been a large swing away from focusing on Migrants and Refugees, which dominated in 2015.

In 2020, if we exclude COVID-19 and Brexit, we see a number of other issues that have come to the fore, such as Racial Justice and Equality, Mental Health and Wellbeing, Climate Change, the Future of Work and AI. Migrants & Refugees, Sustainability and Big Data saw considerable falls in volume of coverage.

WHAT PREDICTIONS CAN WE MAKE ABOUT FUTURE TRENDS IN MEDIA COVERAGE OF THE BIG ISSUES?

Figure 8. % of articles mentioning COVID-19 overall and in headlines (1 Jan 2020 to 31 June 2021)



COVID-19

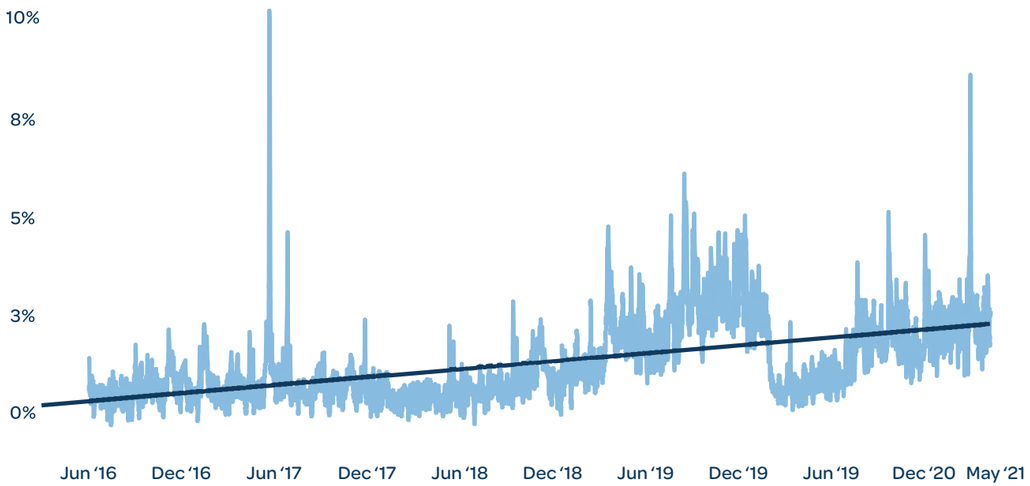
The COVID-19 pandemic was unprecedented in terms of its impact on media coverage, and it is very hard to predict future potential trends in focus because this very much depends on the trajectory of the pandemic, the success of vaccines, and the emergence of variants, which is as yet unknown. We do not make any specific predictions about the outlook for COVID-19 coverage other than that we expect it to continue to dominate the media agenda in 2021, though not to the same extent as in 2020.

The data shows that while mentions and headline mentions of COVID-19 peaked from March to May 2020, the topic has seen fairly stable levels of media attention since June 2020, particularly in terms of the proportion of all media coverage that featured a headline mentioning COVID-19; even in May 2021 this stood at 7.1% of all articles. We expect COVID-19 to be referenced in around a third of articles in 2021, compared to 43% in 2020.

We expect COVID-19 to be referenced in around a third of articles in 2021, compared to 43% in 2020.

CLIMATE CHANGE

Figure 9. Climate Change coverage as a percentage of all coverage (1 June 2016 to 31 May 2021)



In Q1 2021, Climate Change more than doubled its presence in the news compared to Q3 2016, passing from being covered in about 0.9% of all media coverage (4,700 articles) to more than 2.6% (12,300 articles).

Despite the fact that the increase in prominence of Climate Change is largely due to movements such as Extinction Rebellion and the school climate strike movement, Fridays For Future, the interruption of such mobilisations during the COVID-19 pandemic has reduced its coverage only partially.

Indeed, more than its intensity, it is the length and consistency of the increase in coverage that makes us conclude that Climate Change will be among the issues dominating the news over the next 18 months. This is in part because some of the demands of such movements have been incorporated in the plans for rebuilding world economies post-COVID-19: a lot of the coverage of Climate Change in 2021 has in fact focused on the various governments pledges to decarbonise economies.

There are already indications that climate activism might be back soon with the easing of COVID-related restrictions. In the UK, Extinction Rebellion has already announced its next cycle of mobilisation that will culminate in COP26 in Glasgow in November 2021, another event that in itself should generate a lot of coverage on Climate Change this year.

OTHER ISSUES

The three key areas where we expect to see particular focus by the media in the rest of 2021 and into 2022 are People's Rights (inc. Women's Rights, LGBTQ+ Rights, Racial Justice & Equality), Mental Health and Wellbeing and the Future of Work.

Figure 10. Mental Health & Wellbeing volume of coverage trend

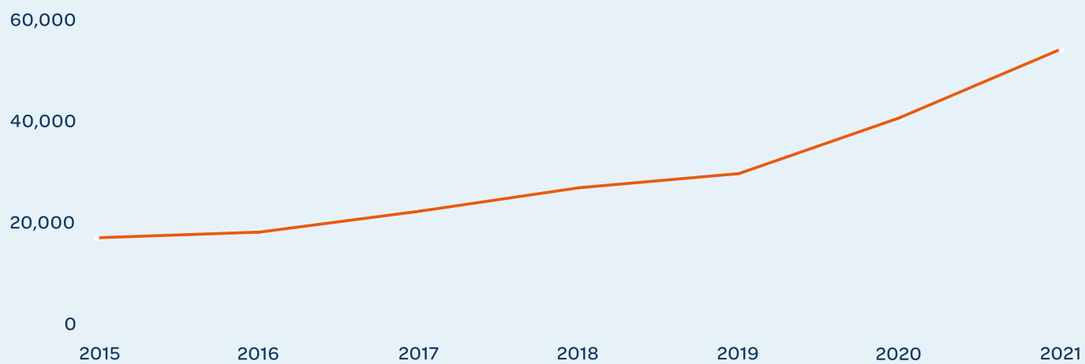


Figure 11. Future of Work coverage trend

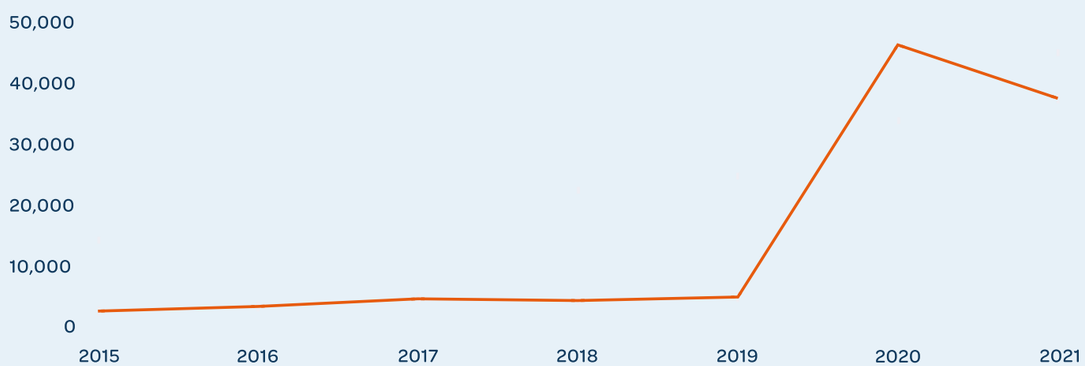
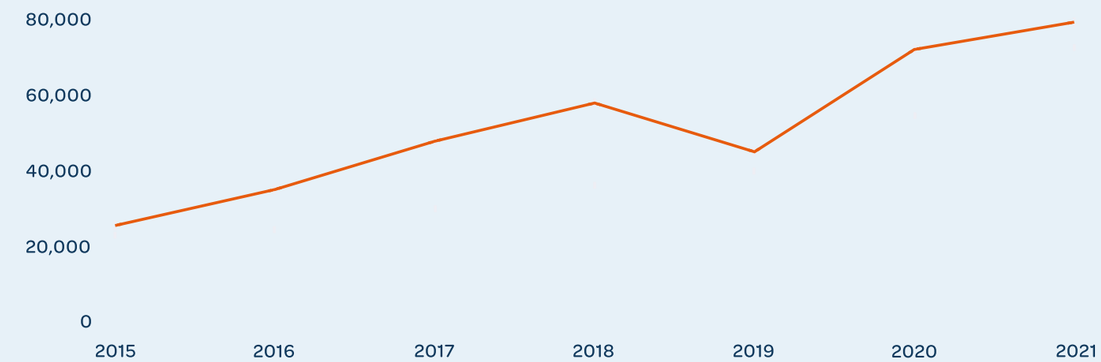


Figure 12. People's Rights coverage trend



Both the Future of Work and Mental Health have been heavily associated with discussion around COVID-19. There are indications though that these are two issues which will remain front of mind as we navigate the 'new normal'. Media coverage relating to Mental Health and Wellbeing had been growing year on year ahead of the pandemic, with COVID-19 accelerating the increase. The same is true for Future of Work, although the focus on new working patterns in the pandemic had a more significant impact than for Mental Health. Data for 2021 indicates the topic will see a small decrease, though we expect this area to remain more of a focus than pre-pandemic.

Similarly, while the murder of George Floyd and subsequent Black Lives Matter protests was a key driver of coverage around People's Rights, there are indications that this was a watershed moment, and we expect there to be continued focus on rights, social justice and equality in the coming years. Apart from a small dip in 2019, coverage on the topic has been increasing since 2015 and we expect the trend to continue as the world focuses on rebuilding a fairer society that recognises and respects diversity.

#4.3 WHAT CONTENT DO READERS ENGAGE WITH IN RELATION TO ISSUES & BRANDS?

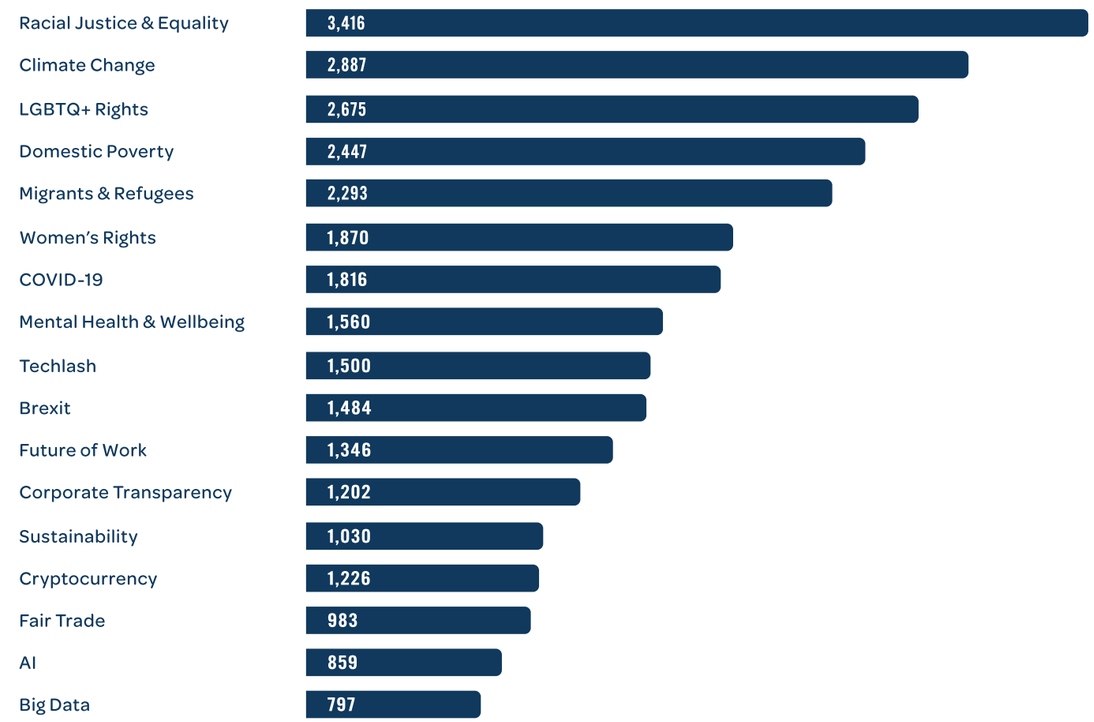
This analysis focused on social media engagement with content published between 1st June 2019 - 31st May 2021. For issues, the sample included all articles in the tracked media outlets that mentioned an issue. For brands, the sample included all articles in the tracked media outlets that mentioned at least one of the 15 brands in the headline.

WHICH ISSUES GENERATED THE MOST ENGAGEMENT?

Our analysis of the data relating to engagements received by articles mentioning an issue indicated that articles referring to COVID-19 generated by far the most engagements (over 2 billion in total).

Figure 13. Total engagements by issue

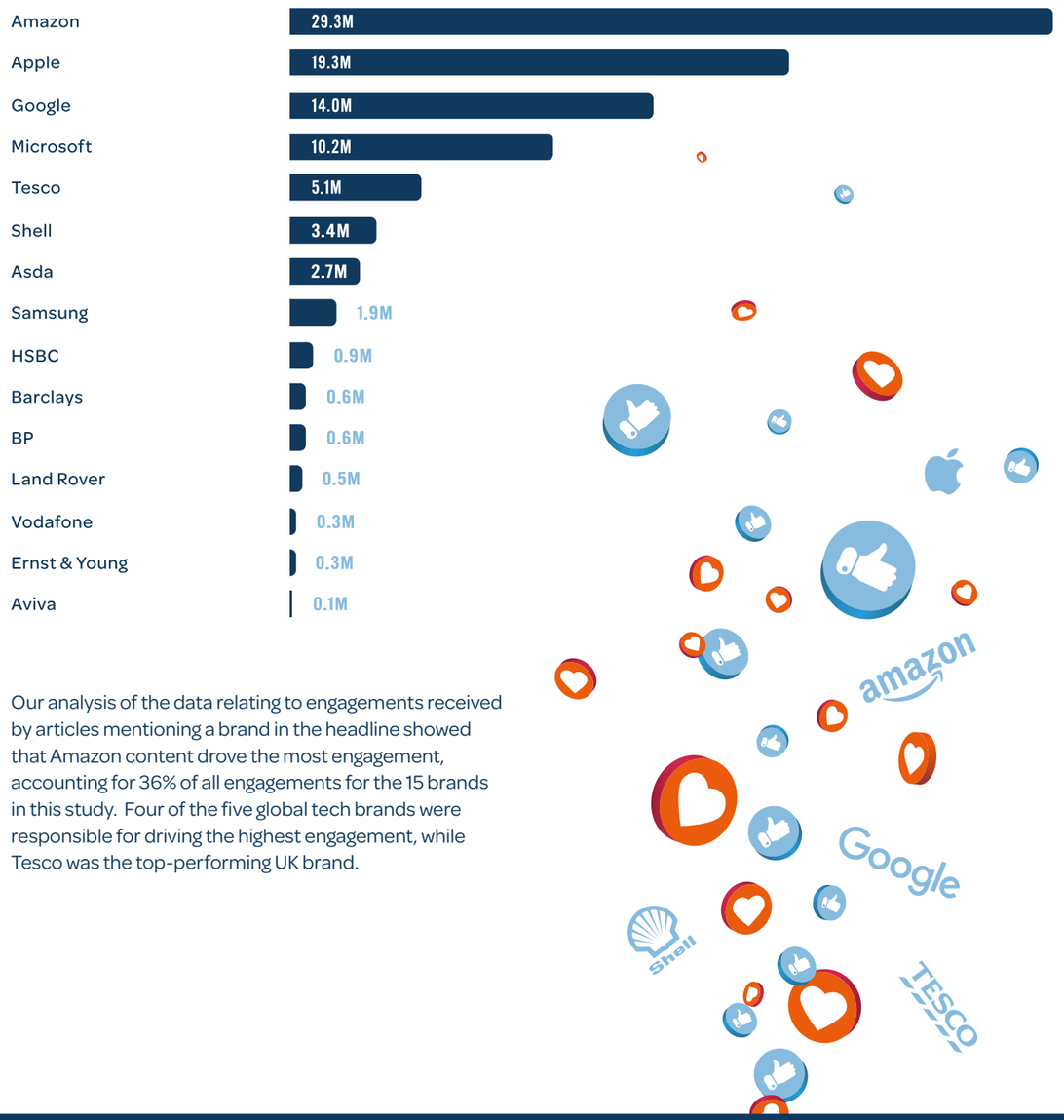
Figure 14. Average engagements per article, by issue



While articles mentioning Racial Justice and Equality generated significantly fewer engagements overall (252M) than those mentioning COVID-19, this represented a higher engagement rate per article (3,416 engagements on average per article). Climate Change, LGBTQ+ Rights, Domestic Poverty, and Migrants and Refugees all had an average of more than 2,000 engagements per article, indicating high levels of reader interest in these topics.

WHICH BRAND'S ARTICLES GENERATED THE MOST ENGAGEMENT?

Figure 15. Total engagements with articles mentioning a brand in the headline, split by brand.



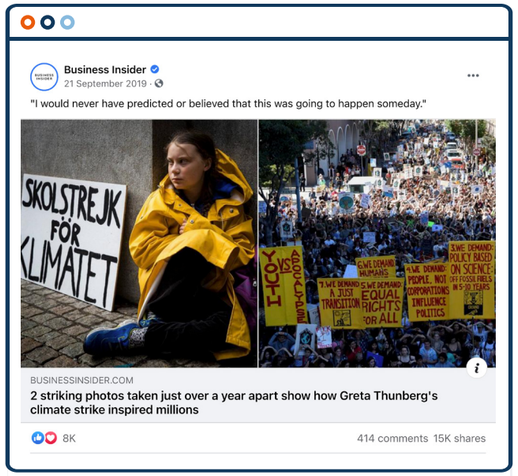
Our analysis of the data relating to engagements received by articles mentioning a brand in the headline showed that Amazon content drove the most engagement, accounting for 36% of all engagements for the 15 brands in this study. Four of the five global tech brands were responsible for driving the highest engagement, while Tesco was the top-performing UK brand.

WHAT WERE THE COMMON FEATURES OF ENGAGING ARTICLES?

INDIVIDUAL PERSONALITIES

Our analysis of the most engaged with articles about key issues, and separately, about brands, indicates that media coverage driving high engagement often has a high profile individual personality as its focus. This point held true for many of the issues; for example, 21 of the top 100 articles by engagement referring to Brexit focused on Boris Johnson, generating over 2 million engagements, while 13 of the top 100 articles on Climate Change focused on Greta Thunberg (3.4 million engagements).

Figure 16. [Link to post]



In the most engaged with articles referencing COVID-19, there was a strong focus on the actions of world leaders (18 articles, 33 million engagements), with a heavy emphasis on the actions and statements of Donald Trump and Boris Johnson. Not all of the central characters in the most engaged with COVID-19 articles were world leaders. In the UK media, Captain Tom Moore was the subject of three of the top 100 articles, generating more than 5 million engagements. This indicates how audiences tend to engage strongly with individual stories; focusing on a central personality may help to drive connection with an issue.

Celebrities were a strong driver of engaging content relating to Racial Justice and Equality, with seven of the top 100 (3 million engagements) referring to statements made in the wake of the George Floyd murder and the subsequent #BlackLivesMatter protests. The news that former basketball player Michael Jordan would donate $100 million to racial inequality causes generated 1.5 million engagements for two articles.

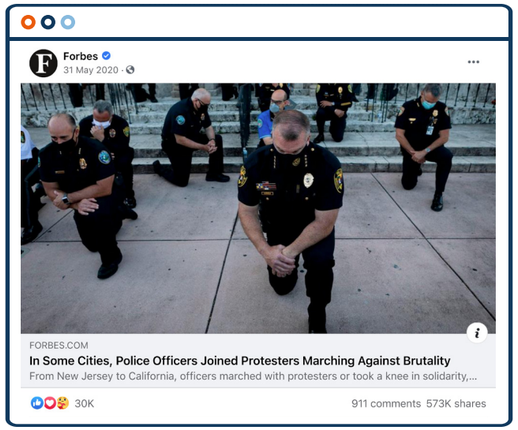
We saw a trend for high engagement with articles about the leadership of companies, too. This reflected our findings for the most engaged with issues content, that individual personalities tend to drive interaction. Jeff Bezos was the focal topic in 13 of the most engaged with articles (1.1 million engagements); Bill Gates was the focus in nine articles (2.1 million engagements); and Elon Musk was the lead topic in two articles (197K engagements). This demonstrates that users are just as interested in the personalities behind brands as the brands themselves. Much of the content driving high engagement relating to Jeff Bezos and Elon Musk focused on their huge wealth and tended to be negative in tone; however, an article about Bezos' supportive stance on #BlackLivesMatter generated the highest engagement (508,545).

For brands, the implications are two-fold. Company leaders have an important role in communicating the brand's stance in relation to social issues and ensuring that they build this positioning in when planning purpose-driven communications. On the flip-side, a leader's actions in relation to the big issues are under public scrutiny; it is important to ensure they, as individuals, are aligned with the brand's values and messaging or they risk undermining the company narrative.

SHOCKING OR SURPRISING NEWS

We also saw evidence that surprising or shocking articles tended to drive the most reader interaction. Often such articles focused on shocking negative news; for example, there were high levels of engagement with articles detailing large case numbers and death tolls in the COVID-19 pandemic (21 articles, 31 million engagements). Similarly, articles focusing on shocking statistics about global warming, rising sea levels, and the polar ice caps melting received more engagement than those focusing on positive actions to fight Climate Change. For Climate Change, six of the top 100 articles (1.6 million engagements) were focused on good news compared to 11, which focused on scientists' warnings (2.9 million engagements).

Figure 17. [Link to post]



There were instances where news that is surprising, rather than shocking, drives high levels of engagement. For example, the most engaged with individual articles referring to an issue referred to Police Officers Joining Protesters Marching Against Brutality following the death of George Floyd (15.5 million engagements).

Instances of insensitivity or hypocrisy were also behind high reader engagement; for example, this article which reported President Trump's references to George Floyd in a speech about improving employment figures (3.5 million engagements).

We see similar themes play out in the most engaged with articles about brands, as content criticising company practices or policies made up 28 of the most engaged with articles (4.9 million engagements). For Amazon, in particular, employee working conditions and benefits were a central theme in this content.

The key takeaway for brands is that high engagement with media articles should not be a direct indicator of successful communication. Analysing engagement with articles, particularly the comments made in response, can provide useful insights to inform messaging and enable brands to be prepared for likely consumer reactions.

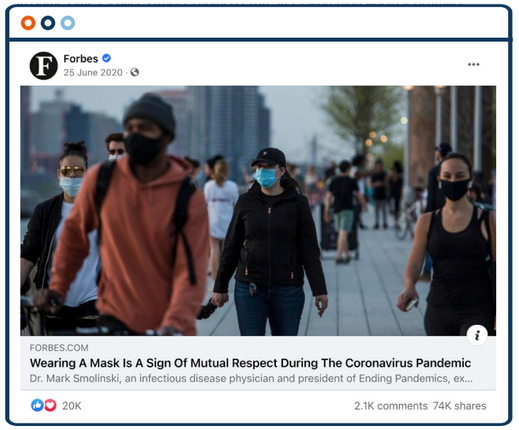
POLARISING AND POLITICAL NEWS

There was also a tendency for articles referencing particularly polarising issues to drive higher engagement, driving online debate on social media.

A good example was the fourth most engaged with issues-related article, which posited that 'Wearing a mask is a sign of mutual respect during the Coronavirus pandemic' (4.6 million engagements). Comments in response to the article on social media expressed a range of opinions supporting and against the content. The COVID-19 pandemic was often the core issue in such articles, as opinions over the need for restrictions and personal protective measures like mask-wearing are heavily divided.

Politics also played a strong role in such articles. Focusing on the most engaged with articles referring to Brexit, parliamentary politics were at the heart of two-fifths of articles (4.4 million engagements), driving online debate from both sides of the leave/remain divide.

Figure 18. [Link to post]



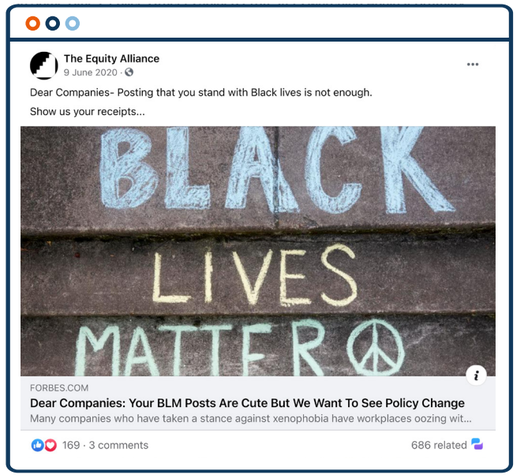
BRAND ACTIONS

We saw the strongest cut-through for brands in the overall most engaged with issues articles on Racial Justice and Equality and the Future of Work.

Brands' reactions to the murder of George Floyd and subsequent Black Lives Matter protests was a prominent driver of the most engaged with coverage (6 articles, 4.1 million engagements). However, among these was an article challenging brands to make real changes to policy following their pledges of support to the black community and the #BlackLivesMatter movement. This supports our conclusion that readers are wary of token gestures from brands and want to see real commitment to change on societal issues.

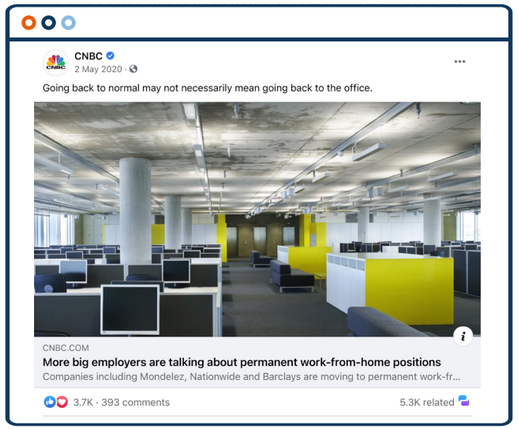
There was strong engagement from audiences with content about the Future of Work that referred to brands. A good example was a Business Insider article, which reported that Microsoft experimented with a 4-day workweek in its Japan office, generating over 1 million engagements. A second Business Insider article discussing the JPMorgan CEO's view that working remotely 'does not work' for young people and those

Figure 19. [Link to post]



who want to 'hustle' received far fewer engagements (24K). This suggests that readers may be more engaged with the concept of continued flexibility around remote working. Major brands and their leaders have a role to play in public debate on the Future of Work as post-pandemic practices are established.

Figure 20. [Link to post]

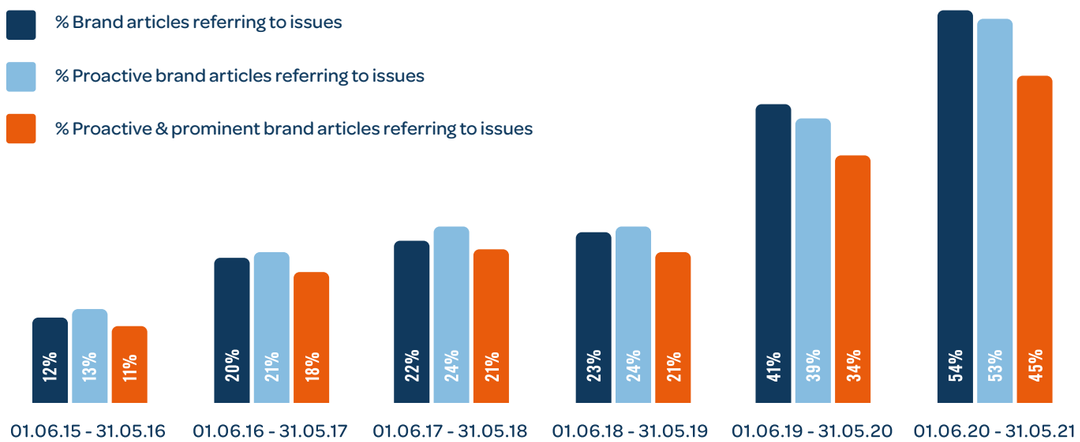


#4.4 ARE BRAND COMMUNICATIONS BECOMING MORE PURPOSE-LED AND DOES THIS DRIVE READER ENGAGEMENT?

ARE BRANDS MENTIONED BY THE MEDIA IN RELATION TO BIG ISSUES?

Our analysis indicates that brands are increasingly being discussed in relation to the big issues that have dominated the media agenda over the last five years. There has been a steady year-on-year rise, since 2015, in articles that mention brands in relation to these issues

Figure 21. Brand articles referring to issues (2015 to 2021)

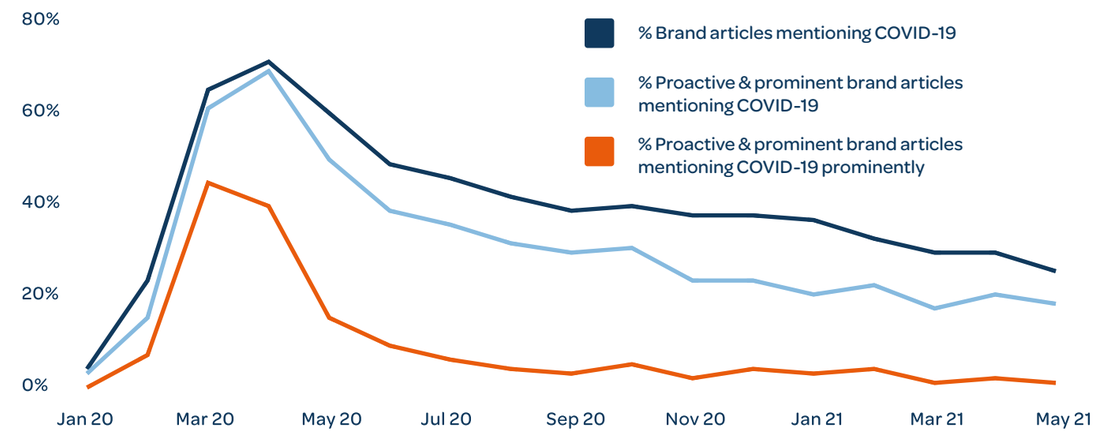


COVID-19

COVID-19 was hugely dominant in brand media coverage from late January 2020 to May 2021; 42% of brand articles in total referred to the pandemic. 33% of proactive and prominent brand articles referred to COVID-19, of which over a third (37%) referred to the pandemic prominently. The five global tech brands were dominant in driving proactive and prominent brand articles that also mentioned COVID prominently, accounting for 77% of such articles.

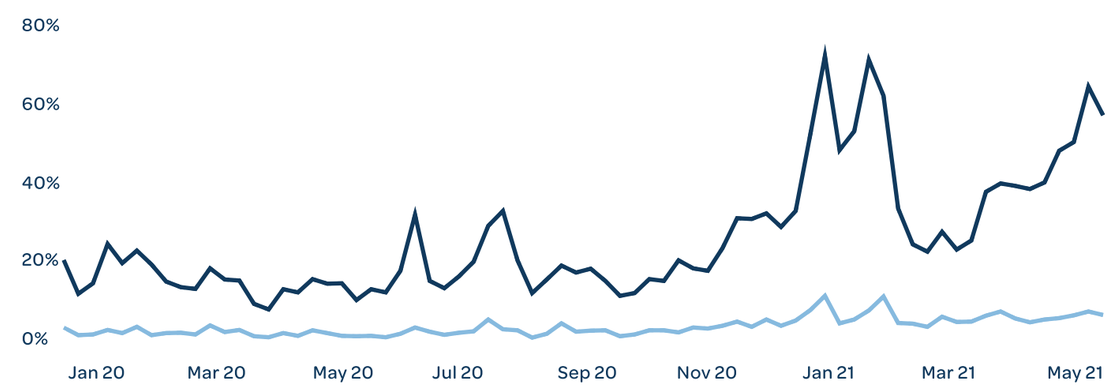
While COVID-19 related coverage peaked for the brands in March/April 2020, even in May 2021 28% of brand articles referenced the pandemic. In the same month, 21% of proactive and prominent brand articles mentioned the pandemic, 4% of which had a prominent mention of COVID-19.

Figure 22. % of Brand articles mentioning COVID-19 (Jan 2020 to May 2021)



CLIMATE CHANGE

Figure 23. Articles mentioning brands & Climate Change vs proactive brands articles mentioning Climate Change (June 2015 to May 2021)



Looking specifically at Climate Change, there has been a general trend since 2015 for increasing brand coverage referring to the topic. This indicates that brands are not fully capitalising on the opportunity to drive media narratives. Given the upward trend, brands would be well advised to consider how they can contribute to, or advance, the Climate Change debate.

ARE BRANDS LEVERAGING SOCIAL ISSUES TO DRIVE MEDIA COVERAGE?

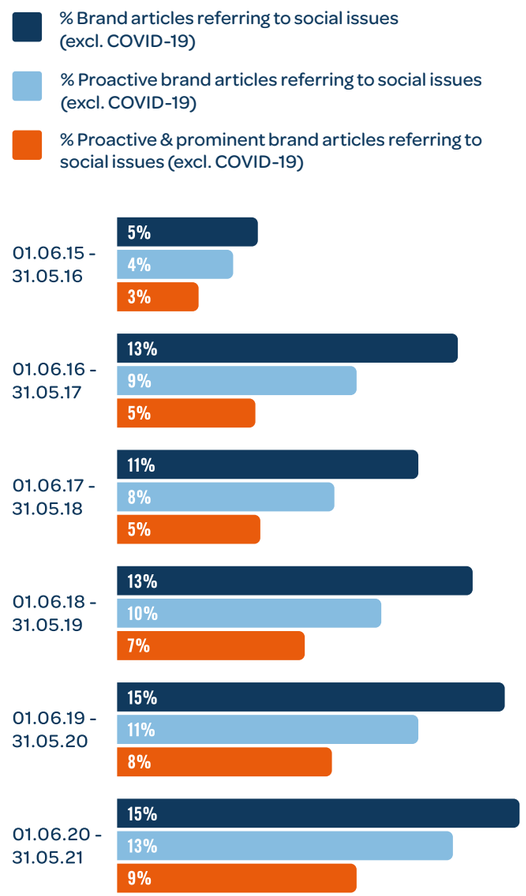
Many brands are increasingly putting their efforts around purpose and sustainability at the centre of their communications so it is not a surprise that there has been an increase in brand coverage around societal issues.

Even excluding COVID-19, which dominated the media in 2020 to 2021, there was still a steady increase in the proportion of brand coverage mentioning social issues from 5% of brand articles in 2015/16 to 15% in 2020/21.

There was a slightly smaller increase in the proportion of proactive brand coverage that referred to social issues, from 3% in 2015/16 to 9% in 2020/21.

Therefore, the data clearly shows that brands are being discussed in relation to social issues and are increasingly driving media coverage around social issues.

Figure 24. Brand articles referring to social issues (excluding COVID-19)

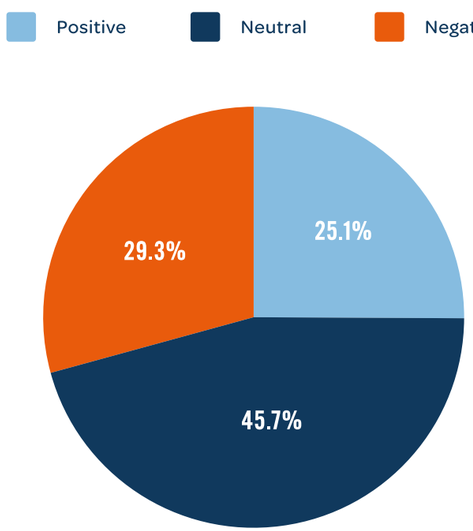


WHAT TYPE OF MEDIA CONTENT DO READERS ENGAGE WITH IN RELATION TO BRANDS & SOCIAL ISSUES?

To understand what readers engage with, we analysed the 200 articles published from Jun 1 2019 to 31 May 2021, with the highest number of engagements that mentioned brands in the headline and referred to social issues.

These 200 articles accounted for 78% of social media engagements (4.6 million), with content meeting these criteria; 12 of the 15 brands featured in this content (EY, Aviva and Vodafone did not appear in the most engaged with articles).

Figure 25. Share of total engagement by article sentiment (articles referencing brands in relation to social issues)



The analysis indicated that while the majority of engagement with brand articles referencing social issues was driven by those of neutral or mixed sentiment towards the brands, a significant proportion was associated with negative articles (29%). In most cases, these articles called out brands for a perceived lack of action on social issues, or for contributing towards the problems at the heart of social issues.

It's worth noting that some of the articles judged to have a neutral or positive sentiment towards the brands' actions generated a critical response from readers. One example of this was Apple's introduction of emojis for the iPhone to represent menstruation and gender-neutral characters. The reporting in the Daily Mail was neutral to positive, but a large proportion of the comments posted on the media outlet's Facebook page in response were scathing or mocked the move.

The social issues included in this analysis tend to be topics driving polarised opinions.

This doesn't mean brands should tip-toe around them, but they should be prepared to receive, and in some cases respond to, negative feedback from some circles when taking action.

Figure 26. Engagements with positive/neutral articles

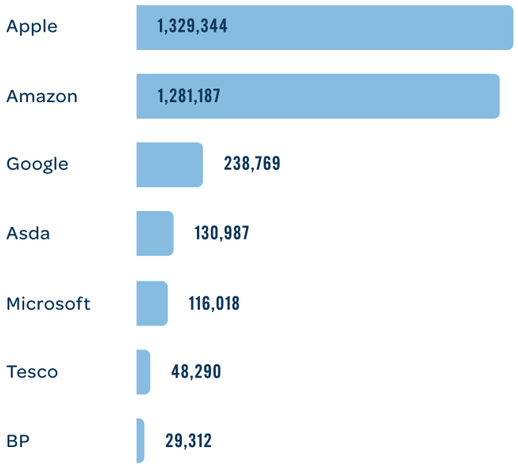
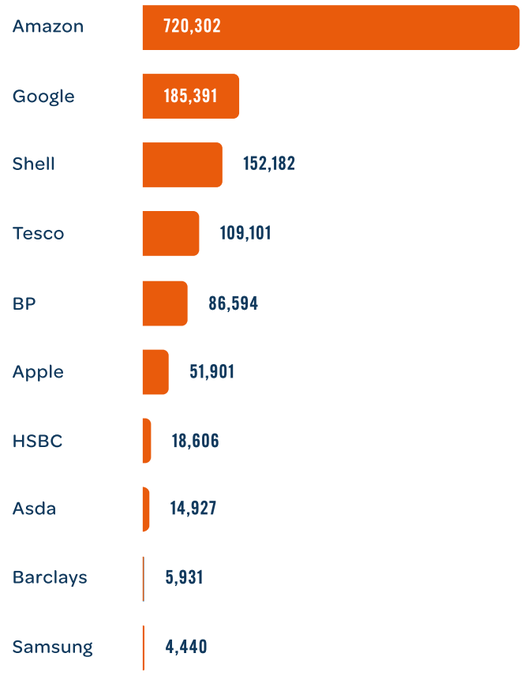


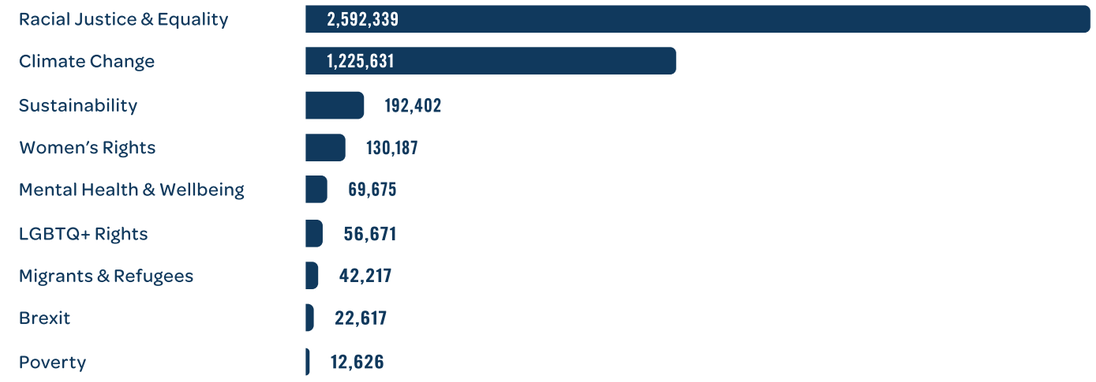
Figure 27. Engagements with negative articles



Articles referring to Amazon in relation to social issues accounted for 44% of engagements overall and 54% of engagements with negative articles. The majority of negative articles about Amazon driving high engagement related to criticism from, or action by, its employees. Often these articles focused on working conditions but referenced criticism from employees and others on Amazon's response to Climate Change. A number of articles referenced claims that Amazon had fired a number of employees for publicly calling for the company to take more action on Climate Change.

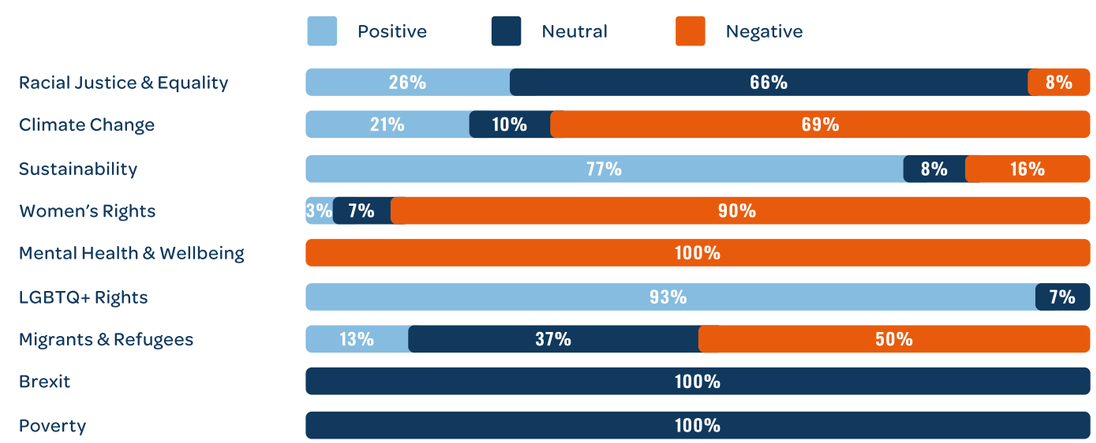
Microsoft was the only global tech brand that only had high levels of engagement with positive or neutral articles. Positive articles driving engagement included a Business Insider article reporting on how Microsoft was using AI to make the planet greener.

Figure 28. Total engagements by social issue mentioned in brand articles



Articles referencing brands in relation to Racial Justice & Equality received the most engagement, accounting for 57% of all engagements. The majority of the articles related to the #BlackLivesMatter protests that followed the murder of George Floyd. A fifth (21%) of these engagements were from five articles reporting Amazon CEO Jeff Bezos' response to a customer who criticised the company's statement in solidarity with #BLM protesters. Negative articles driving high engagement tended to be driven by articles criticising brands for insensitivity towards or lack of action on racial equality. These included three criticising a 'racist' T-shirt on sale at Tesco (47,940 engagements).

Figure 29. Engagements for social issues split by the sentiment of article towards brand



Climate Change accounted for 27% of engagements with content mentioning brands and social issues. 69% of the engagements were with negative articles, indicating a strong public response to criticism of, or lack of action on, Climate Change by brands.

Shell was prominent in this coverage, as several articles reported on a ruling by a Dutch court that it must reduce its carbon emissions by 45% by 2030 from 2019 levels. Reader reactions indicated they supported the decision or wanted even stronger action to be taken. Positive articles driving engagement included an announcement from Microsoft in which they pledged to become carbon negative by 2030 and reports that Samsung was redesigning its TV packaging to be reused in other ways, such as a book rack.

None of the articles driving high engagement on brands and LGBTQ+ rights were negative towards the brands. Four of the articles, accounting for over 40K engagements, reported on Amazon's decision to stop selling books that "frame LGBTQ+ identity as a mental illness." The response from consumers was mixed; Facebook reactions to The Guardian's article had 83% 'love' reactions, and just 4% angry reactions, whereas the WSJ's article had 26% love reactions and 50% angry reactions. This indicates further how taking action on social issues is unlikely to provide the same reaction from all readers.

WHAT SHOULD BRANDS CONSIDER WHEN SEEKING PROACTIVE MEDIA COVERAGE ON BIG ISSUES?

When brands generate media coverage around social issues, it is important to focus on issues that are a good fit with existing brand values and/or where the brand can help solve societal issues (e.g. through tech innovation, product design, services, supply chain changes, HR changes etc.). If a brand publicises an initiative that is perceived as a kind of whitewashing, a small gesture that looks on paper good but is not in line with broader company practices, it can drive a negative reaction both in the media and the public.

A case in point is when Amazon released images of "AmaZen" booths, tiny cubicles designed for its warehouse employees to "focus on their mental and emotional wellbeing." Given the increasing focus on Mental Health & Wellbeing in the media agenda, this may have seemed like a sound tactic. Still, there was a strong backlash because the initiative followed recent claims from Amazon employees of unfair work practices, as well as wider criticism about Amazon's low corporate tax contributions. On social media, some referred to the booths as 'cry closets.'

Similarly, Shell's campaign activities related to Climate Change, including its sponsorship of the Science Museum's climate exhibition, have tended to provoke angry responses from climate activists and the wider public.

Best practice examples of brands in this study which generated strong proactive coverage related to issues included EY, who capitalised on their reputation for excellence in thought leadership and research with their reporting on the impact of Brexit. EY also avoided gimmicks in sharing its commitment to beating Climate Change, revealing a thorough seven-point plan to become carbon negative by the end of 2021. Steve Varley, EY's chief sustainability officer, said: "Our commitment is to remove more carbon dioxide from the atmosphere than we emit every year, forever."

Brands that make a real and substantial commitment to positive change are likely to yield the best results. Asda's moves to improve sustainability by offering refill dispensers for some products was generally greeted positively by the public. However, some mused that this was a return to the type of option that existed before big supermarkets took over. Similarly, Tesco's announcement of its target to sell more vegan products by expanding its offering was also well-received, particularly by the growing vegan community.

Figure 30. [Link to post]

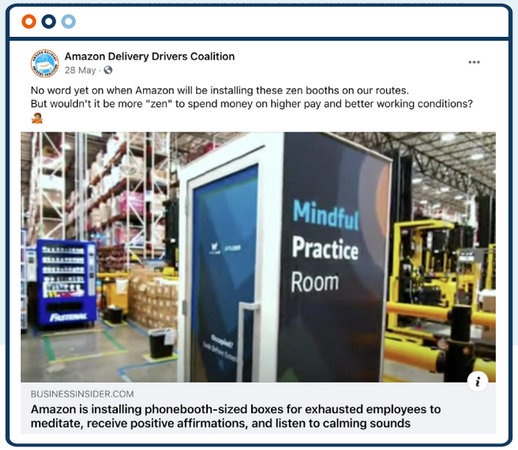


Figure 31. [Link to post]

#5 CASE STUDIES

WHAT EXAMPLES CAN WE LEARN FROM THAT CREATE A BLUEPRINT FOR BEST-IN-CLASS COMMUNICATIONS FOR 2022?

The quantitative aspect of this research has focused on media coverage around 15 core brands. In this section, we take a more qualitative look at examples of strong purpose-led communication, focusing on digital and technology brands.

#5.1 SALESFORCE

Customer relationship management platform Salesforce is well-known for putting purpose at the heart of its business; on its website, it states: "the business of business is to improve the state of the world...we work to make sure Salesforce is a platform for change." So it comes as no surprise that the brand offers a best-in-class example of purpose-led communications. There are two core factors in this success, which echo key findings of our research; taking action that has a real impact and harnessing the powerful voice of leaders.

TAKING ACTION THAT HAS A REAL IMPACT

Through its Salesforce Ventures arm, the company has put its money where its mouth is, so to speak, by launching its Impact Fund, which invests in innovative cloud companies that have 'measurable social or environmental impact.' The first fund, launched in 2017, dedicated $50 million to companies focusing on addressing societal challenges, while the second, launched in 2020, doubled the investment to $100 million, as reported by forbes.com and eu-startups.com.

Furthermore, Salesforce demonstrated a real commitment to tackling Climate Change through its announcement in April 2021 that suppliers would be required to set carbon-reduction goals and deliver products and services on a carbon-neutral basis. In an article published by fortune.com, Joel Makower, chairman of GreenBiz Group, said: *"I would put Salesforce at the front of the class when it comes to corporate action on Climate Change... They see the need to lead and the opportunity to push the market, their suppliers, and customers forward."*

Figure 32. [Link to post]

HARNESSING THE POWERFUL VOICE OF LEADERS

Salesforce has a very strong asset in CEO Marc Benioff, who used his powerful voice to drive change, particularly in relation to Climate Change and Sustainability. Benioff regularly posts about Climate Change and other societal issues to over 1 million followers on Twitter, raising awareness of causes while also drawing attention to Salesforce's efforts for social good.

Benioff's championing of the World Economic Forum's Trillion Trees initiative helped gain the commitment of over 300 companies to contribute to the goal of planting 1 trillion trees by the end of the decade.

He also took action to lobby the government, as shown in his signing of a letter, along with other business leaders, to President Biden in support of his administration's goals to combat Climate Change.

While not all company leaders have the clout of Benioff, other brands can learn from the passion and commitment he shows and support their own leadership to be a voice for change.

Figure 33. [Link to post]

#5.2 LINKEDIN

The leading professional social media network LinkedIn, plays to its strengths in order to make an impact on societal issues. This can be seen in several examples of communications over the last 18 months.

SUPPORTING PEOPLE IN A DIFFICULT JOBS MARKET

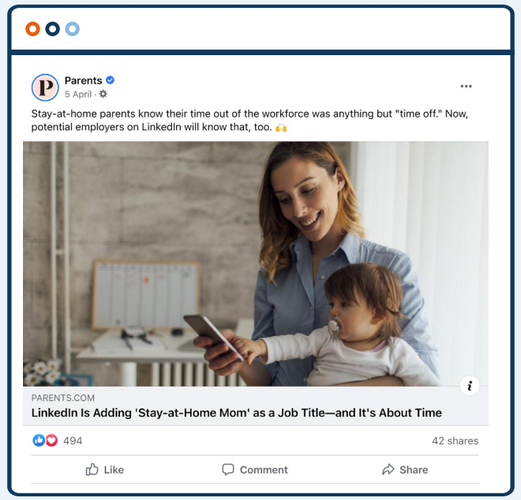
As the COVID-19 pandemic left many people out of work, LinkedIn data was used to identify the most in-demand job roles to help individuals and governments understand where to focus retraining and upskilling efforts. LinkedIn offered free courses to help people learn the skills required by the most in-demand jobs, a move that was praised in an article on forbes.com.

EMPOWERING USERS THROUGH INCREASED PROFILE OPTIONS

LinkedIn took swift action in response to an article calling for it to do more to help people describe the gaps in their careers associated with caring for children, an issue that had become even more pressing in the COVID-19 pandemic. LinkedIn recognised the important role it could play in normalising career gaps, adding the option to use stay-at-home mum/dad/parent as a role description, along with the more generic mum, dad or caregiver descriptions.

In a separate move, LinkedIn also introduced the ability for users to add their preferred gender pronouns to profiles, empowering them to communicate how they self-identify.

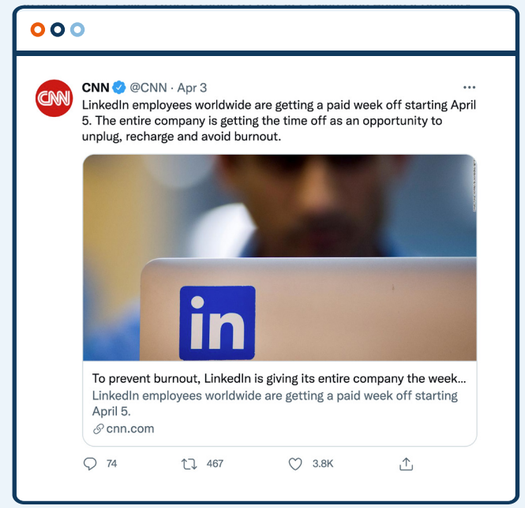
Figure 34. [Link to post]



MAKING BOLD MOVES TO SUPPORT EMPLOYEE WELLBEING

In April, LinkedIn took practical steps to support employee wellbeing by offering extra paid time off and giving its employees a paid week off, after employee surveys indicated increased signs of 'burnout' during the COVID-19 pandemic. The company also recognised that some employees could feel isolated in the week off, so they put in place optional daily activities to support social connections. As the world's leading professional social network, making a bold move such as this to support mental health paves the way for others to follow.

Figure 35. [Link to post]



Brands can learn from LinkedIn's careful consideration of how it can use its unique assets to contribute to solutions to societal issues. LinkedIn also shows how brands can lead the way on innovating solutions to new problems emerging from the COVID-19 pandemic.

#5.3 TECH AND DIGITAL START-UPS

Communications from tech start-ups relating to societal issues are particularly interesting, as often, these issues are at the heart of the company's mission.

This is certainly true of Included Health, a concierge healthcare platform partnering with employers to connect LGBTQ+ members to culturally competent, quality healthcare providers.

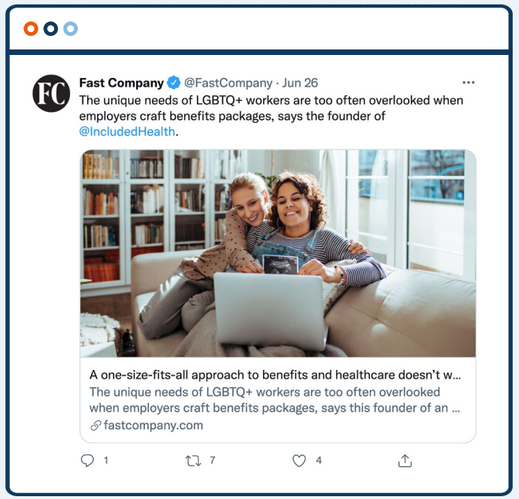
Its mission is to ensure members of the LGBTQ+ community can access quality healthcare, but its communications are also aimed at educating others, including employers, on how they can be supportive of the LGBTQ+ community. Included Health and its leadership team act as thought leaders in raising awareness of challenges facing the transgender community in accessing healthcare.

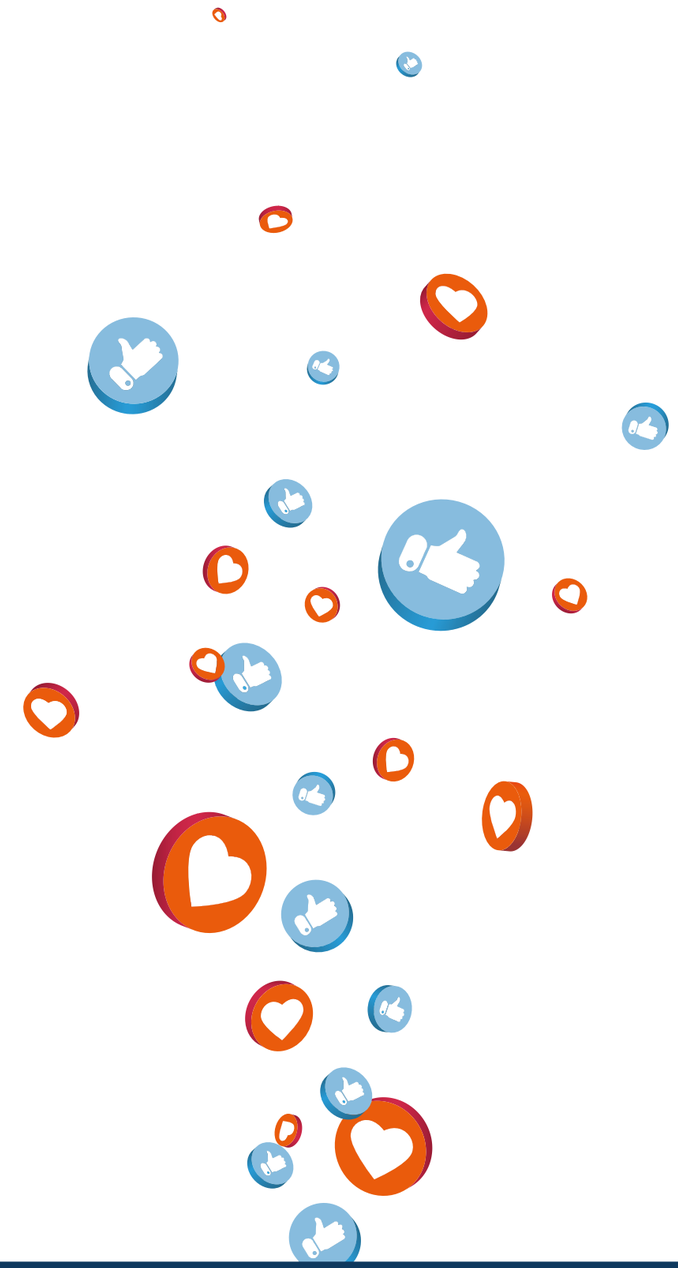
Depop, the peer-to-peer social shopping app, describes itself as a "community-powered fashion ecosystem that's kinder on the planet and kinder to people". Its raft of celebrity users have helped to drive increased acceptance of environmentally friendly pre-loved clothing habits, and communications about the brand often reference household names such as actress Emily Ratajkowski and pop star Lily Allen. Mainstream clothing brands have seen the level of consumer interest in innovator brands such as Depop and are joining the fray, with Asda experimenting with selling vintage clothing in stores and H&M brand Cos adding a resales section to its website.

Other tech start-ups focus on how their technology can be applied to support progress on societal issues. An example of this is Onfido, a hot UK scale-up (and Brands2Life client) that uses AI to verify whether identity documents are genuine and match them against facial biometrics of users. Onfido has made widening access to services a core part of its mission. This was evidenced in communications around a recent deal with WorldRemit, which was highlighted as helping to increase financial inclusion as Onfido's verification technology works even if customers are sending photos using low-spec smartphones and cameras.

Brands won't always have the agility of tech start-ups in pivoting to focus on solving societal issues, but such examples can provide inspiration on innovating products and services to help move the dial.

Figure 36. [Link to post]





#6 CONCLUSIONS

This research confirms that brands are operating in a media landscape where the opportunities to achieve coverage are shrinking, and issues are increasingly the focus of the media agenda.

Research indicates that consumers are increasingly looking for brands that support social causes and have eco-friendly policies. In line with this, our analysis shows that the brands in this study are increasingly mentioned in relation to social issues, and we also see an uptick in proactive and prominent brand coverage referencing social issues.

While we conclude that proactive outreach around social issues may offer the best opportunity for brands to maintain their earned media presence in a challenging landscape, our analysis indicates a need for careful consideration of several factors before embarking on a purpose-led communication strategy.

01 Brands should focus on taking real, impactful action and making genuine contributions to further the debate on social issues. Small, surface-level actions by brands are often perceived as token gestures, piggy-backing on a trending issue to generate media attention. Consider how the brand can make a real difference by contributing to the solution; this could be through innovating products or services, making changes to supply chains, adjusting policies or lobbying for change.

02 Brands should also consider how any planned communication sits with current media and public perceptions of the brand in relation to both the issue in question and wider, related issues. Readers don't respond well to brands who communicate proactively on a social issue while being perceived as contributing to the problem in the first place. We recommend either comprehensively communicating around how the brand is tackling the underlying issues or focusing on issues that don't clash with brand perceptions.

03 Finally, brands should also recognise that social issues can be polarising; this doesn't mean that brands should tip-toe around a social issue, but they should carefully analyse how core audiences are likely to react and be prepared to mount a robust response.

To gain critical insights from bespoke research on your organisation and to develop a communications strategy that uses data to navigate this new media landscape, contact us for an initial discussion on how we can support you.

MEDIA MEASUREMENT

This research has been conducted by Media Measurement (MM), a leading digital research consultancy that pairs data-driven technology with insight-led human analysis to help organisations filter through the increasingly noisy spaces of online and offline media. We pride ourselves on our ability to predict trends, identify opportunities and surface opinions hidden within consumer conversations for major corporations, brands, NGOs and governments. We have been running award-winning media insight programmes for more than 25 years and have deployments in over 60 countries speaking more than 50 languages.

Please contact us to discuss how you can leverage our expertise to help your organisation:
enquiry@mediameasurement.com

BRANDS2LIFE

Brands2Life is a leading, award-winning, independent PR and communications agency with a passion for working with the brands that are transforming our world. Clients range from corporations who are transforming with purpose, industry disrupters and online leaders, and the pure tech players who are powering these transformations. Whether it's a PR programme or a multi-discipline, multi-channel campaign, the Brands2Life BETTER STORIES I BIGGER IMPACT approach delivers exceptional creativity and outstanding results worldwide.

To discuss how we can put the report findings into action for your brand, please get in touch:
workwithus@brands2life.com

#7 APPENDICES

APPENDIX 1: MEDIA OUTLETS

The analysis included articles published online from the following leading UK and US media outlets:

Financial Times
Daily Telegraph
Daily Mail
Daily Express
Daily Mirror
Independent / i
The Guardian
Reuters
Forbes
Bloomberg
Wall Street Journal
CNBC
Sky News
BBC News
Business Insider
Management Today
Growth Business
Startup.co.uk
Economist
Sifted
Elite Business
Smallbusiness.co.uk
CEO Today
London Evening Standard
Metro

APPENDIX 2: SEARCHES & METRICS

The analysis focused on these core elements in relation to the media coverage:

All media coverage: we were able to estimate the total number of articles published by the media outlets by creating a search with the most common letters/words used in the English language.

Brand coverage: we created Boolean searches to identify articles referring to the brands in oy

ISSUES COVERAGE:

Proactive coverage: to identify proactive brand coverage, we designed a Boolean search to identify mentions of words and phrases likely to be associated with proactive outreach from a brand, appearing in close proximity to a brand name; e.g. survey, poll, campaign, initiative, conference, event, product launch, announcement etc.

Prominent coverage: to identify prominent coverage, we designed searches to identify mentions of brands in headlines or first paragraphs. In some cases, we also applied this approach to analysing issues (e.g. identifying COVID-19 articles where the topic was mentioned in the headline/first paragraph). In some cases, we narrowed it down to solely headline mentions.

Proactive and Prominent: we combined our searches to identify articles that referenced a brand in the headline that was driven by proactive outreach from the brand.

Engagements: we analysed the number of likes, comments and shares for posts with links to an article mentioning a brand, or an issue (or both) that were shared on social media (Facebook, Twitter and Reddit).

APPENDIX 3: GLOSSARY

Proactive coverage: news articles driven by proactive media outreach by brands. Activities driving proactive media coverage may include research and surveys, campaigns and initiatives, conferences and events, product launches and other announcements.

Prominent coverage: news articles with a prominent mention of a brand (or issue). A prominent mention is where a brand (or issue) is mentioned in the headline or first paragraph of the article.

Proactive and Prominent: articles that reference the brand in the headline or first paragraph that are also driven by proactive outreach from the brand.

Engagements: the total number of likes, comments and shares for social media posts on Facebook, Twitter and Reddit where links to an article are shared on social media

Sentiment: based on an analysis of the overall tone of the article towards a brand or topic, we assign a rating of positive, neutral or negative.

APPENDIX 4: THE ISSUES

The analysis focused on 17 core issues that were on the media agenda during the analysis period. When we refer to 'big issues' in this analysis, we are referring to these issues.

Brexit/EU Referendum
COVID-19
Climate Change
Sustainability
Fair Trade & Ethical Supply Chains
Women's Rights (inc. #MeToo)
LGBTQ+ rights
Techlash (inc. Cambridge Analytica, Data Privacy, misinformation)
Future of Work
Racial Justice & Equality (inc. #BlackLivesMatter)
Migrants & Refugees
Artificial Intelligence
Cryptocurrency
Big Data
Mental Health & Wellbeing
Domestic Poverty
Corporate Transparency

These issues were categorised into sub-themes:

Social Issues: Brexit/EU Referendum*, COVID-19*, Climate Change, Sustainability, Women's Rights, LGTBQ+ Rights, Racial Justice & Equality, Migrants & Refugees, Mental Health & Wellbeing, Domestic Poverty.

**Note that at times in the analysis relating to Social Issues, COVID-19, and in some cases, Brexit, were excluded from analysis, as inclusion obscured trends relating to other social issues.*

People's Rights: Women's Rights, LGBTQ+ Rights, Racial Justice and Equality.

Technology Issues: Techlash, Big Data, Artificial Intelligence, Cryptocurrency

Business Issues: Fair Trade & Ethical Supply Chains, Corporate Transparency, Future of Work.

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