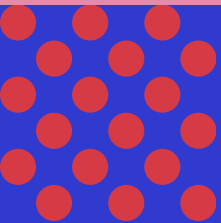




**MEANINGFUL
BRANDS 2021**



MEANINGFUL BRANDS

Twelve Year study exploring how brands tangibly improve peoples' lives functionally, enhance their personal well-being, and contribute to wider society.

The Meaningful Brands Study is unique within the industry

1

Dating from 2009,
was the
**FIRST GLOBAL
FRAMEWORK** to
connect brands with
human well-being

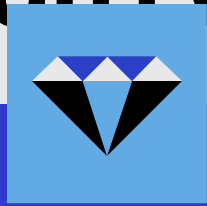
2

Explores
**PROPRIETARY
METRIC** of brand
strength for business
and marketing
planning

3

Helps us identify how
and where to
**MEANINGFULLY
ENGAGE**
with people through
customer, brand and
media experiences

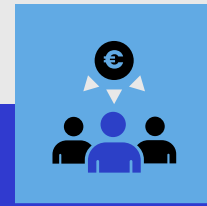
Why the Study Matters Now More than Ever



In current landscape, consumers and society expect more **long-term value** from businesses and brands



After almost 50 years, Davos Manifesto was updated, emphasizing the responsibility for businesses to be **stewards of the planet and all people**



The idea of **stakeholder capitalism** is growing in momentum



A TANGIBLE DEFINITION OF 'MEANINGFUL'

Understanding what matters across 3 pillars and 14 dimensions



PERSONAL BENEFITS

Messaging and behavior that connects on an individual basis and serves a specific personal need or want



PHYSICAL



ORGANISATIONAL



FINANCIAL



INTELLECTUAL



SOCIAL



EMOTIONAL



NATURAL

COLLECTIVE BENEFITS

Company initiatives, behaviors, and actions that respond to and connect at the social and cultural level



ECONOMY



EMPLOYER



ETHICS



GOOD LIVING



ENVIRONMENT



SOCIAL JUSTICE

FUNCTIONAL BENEFITS

Rational benefits focused on product functionality, customer service, interactivity, and technology



FUNCTIONAL

Brands are measured against specific attributes – *pertinent to their category* – within each pillar



FUNCTIONAL

How the product or service delivers

- Banking app
- Best Camera
- Clear Info
- Comfortable clothes
- Compatibility
- Data privacy
- Delivers
- Designs
- Digital experience
- Easy journey
- Easy returns
- Easy Switch
- Exclusive exp.
- Fair Prices
- Fix cuts
- Handling
- Handset Change
- Helpful Staff
- In charge
- In store experience
- Inclusive Collection
- Innovative
- Interactions
- Leader
- Multisensory
- Price's consistency
- Proactive
- Quality brands
- Quality Prods
- Range
- Respect
- Safe & Responsible
- Safety features
- Scents
- Tariffs Range
- Technology-driven
- Tools & services
- Unique
- Upright



PERSONAL

How brands improve peoples' lives

- PHYSICAL**
 - Healthy
 - Attractive
- INTELLECTUAL**
 - Trendy
 - Skills
 - New Ideas
- EMOTIONAL**
 - Me Happy
 - Makes me content
 - Self-Esteem
 - Peace of Mind
 - Show-off/Pride
 - Self expression
 - Privileged
 - Relaxed
- NATURAL**
 - Env. Enabler
 - Sense of Purpose
- ORGANISATIONAL**
 - Life Easier
 - Better Habits
 - Save Time
- SOCIAL**
 - Belonging
 - Sharing
 - Connecting
 - Closer
- FINANCIAL**
 - Best interests
 - Savings
 - Wealth



COLLECTIVE

A brands role in society

- ECONOMY**
 - Local Suppliers
 - Development
 - Benefits the Economy
- ETHICS**
 - Transparent
 - Causes
 - Data protection
 - Ethical
- ENVIRONMENT**
 - Respects Animals
 - Sust. consumption
 - Climate change
 - Respects Nature
 - Sust. Energy
 - Sust. Innovations
 - Clean supply chain
 - Food waste
 - Sust. Brands
- SOCIAL JUSTICE**
 - Migrants
 - LGBT+ rights
 - Women's rights
 - Anti-racism
 - Social Leader
 - Improve access
 - Diversity
- GOOD LIVING**
 - Healthy lives
 - Education
 - Culture access
 - Food security
 - Poverty
- EMPLOYER**
 - Good employer
 - Jobs
 - Invests

In orange: Attributes specific to a category

The Study is Valuable in Multiple Ways

Understanding the specific **FUNCTIONAL, PERSONAL AND COLLECTIVE** benefits that people are seeking from a brand in a given category

Recognizing the **DEFICIT** and capitalizing on this for competitive advantage

IDENTIFYING THE BEST KIND OF CONTENT

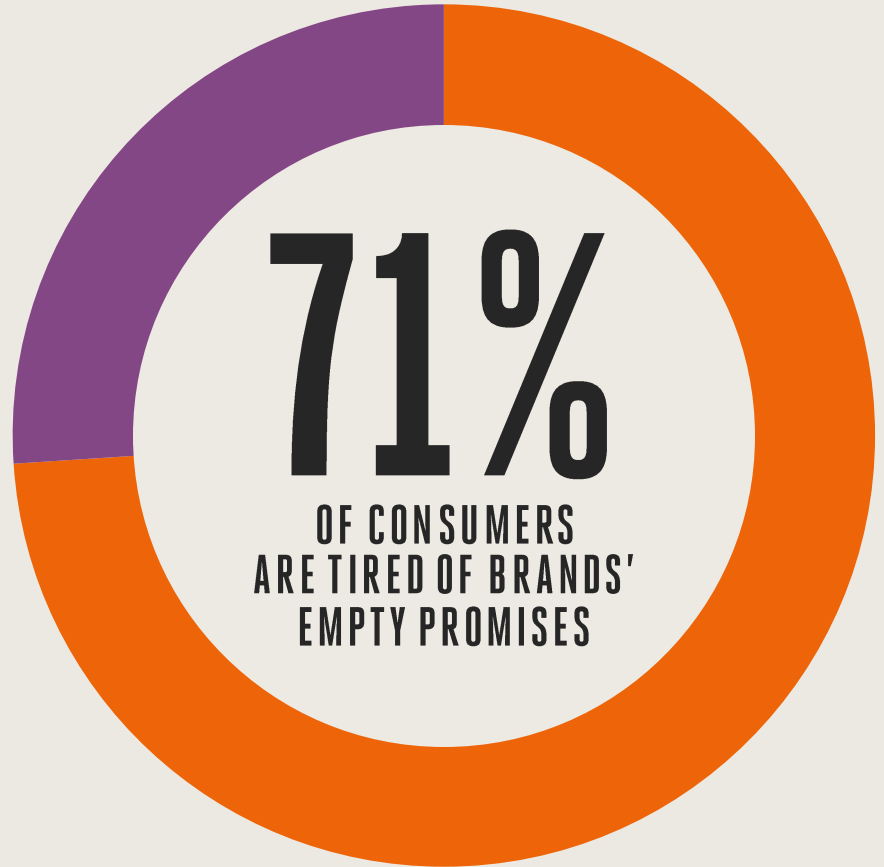
For a brand to deliver within the customer's journey

Unlocking the **AUTHENTIC** role for a brand to play in a landscape that requires new kinds of **SOCIETAL COMMITMENTS**

**FOR THE 12TH YEAR,
THERE IS A DECLINE
IN THE VALUE MOST
CONSUMERS SEE
FROM BRANDS**



**WORSE STILL -
UNCERTAINTY SPILLS
OVER. POLITICAL
AND SOCIAL UNREST,
DISINFORMATION AND
DISTRUST HAVE BEGUN
TO IMPACT OUR
RELATIONSHIP WITH
BRANDS.**





THE AGE OF CYNICISM

MEANINGFUL BRANDS 2021 IN NUMBERS

2021 STUDY
(CONDUCTED Q3 2020)



+350,000 CITIZENS



2,000 BRANDS WORLDWIDE



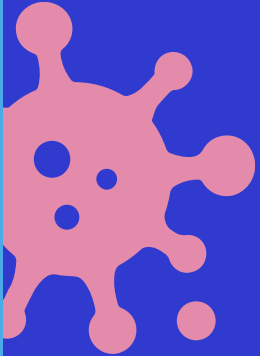
310 MARKETS



21 INDUSTRIES

The chaotic cultural landscape exacerbated in 2020 has significantly impacted consumer priorities and behavior

Global
Pandemic



Political
Friction



Societal
Demands

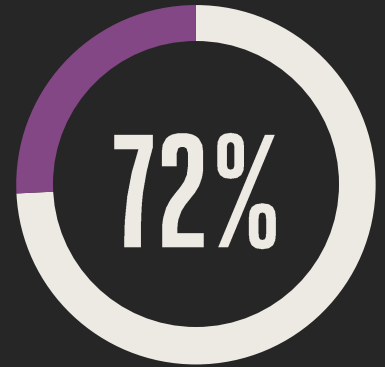
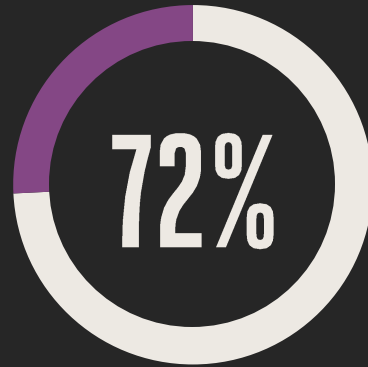
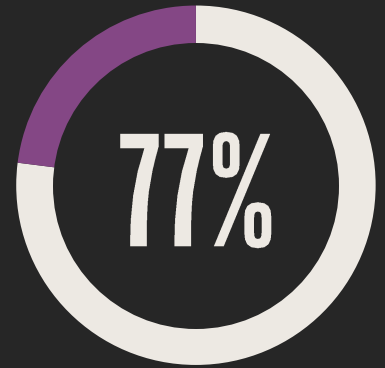
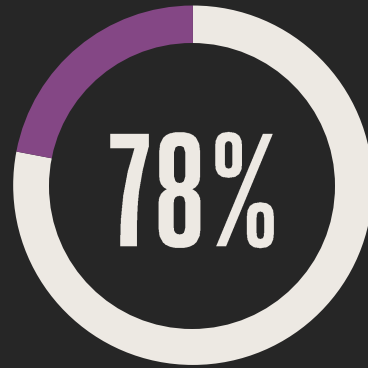


Misinformation/
Disinformation



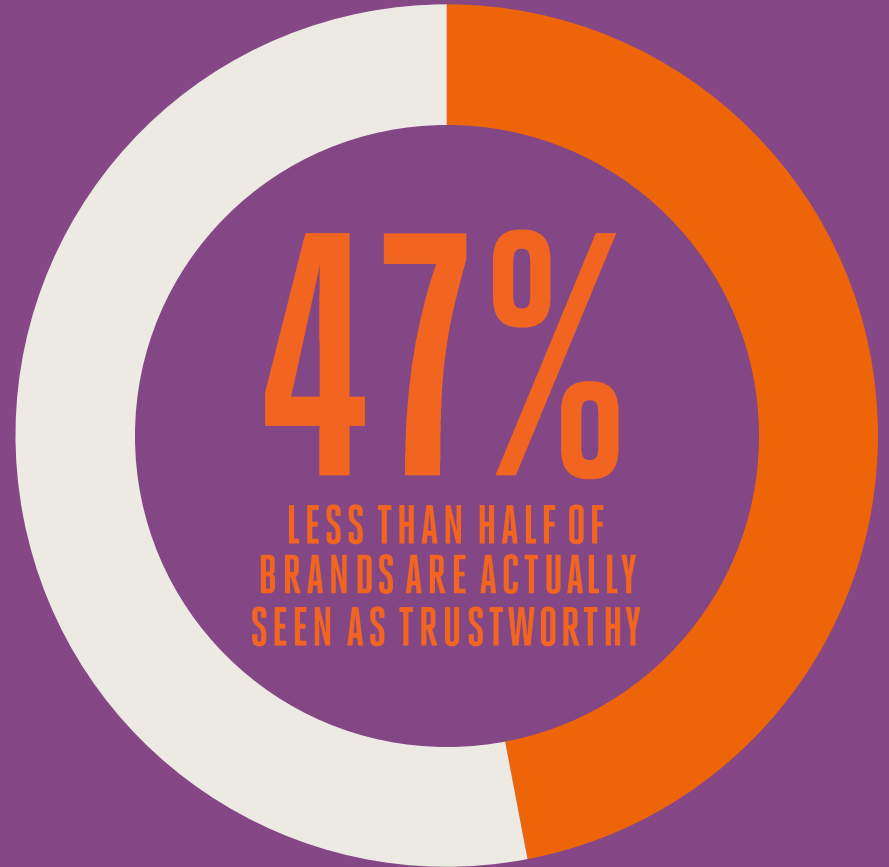
A STATE OF CRISIS HAS SHIFTED OUR PRIORITIES

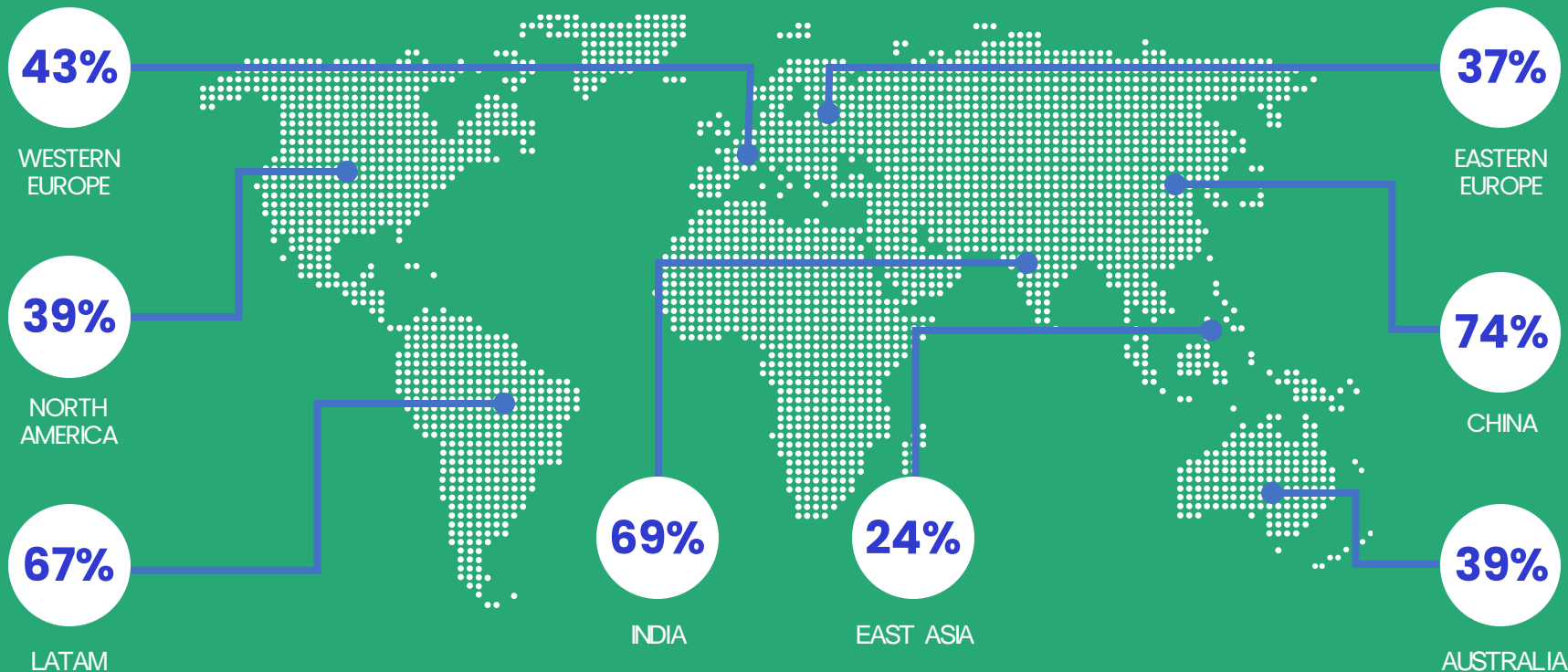
THREE QUARTERS OF GLOBAL CITIZENS FEEL WE ARE
LIVING IN A GLOBAL CRISIS ACROSS FOUR KEY AREAS



**AMIDST THIS
CULTURE OF CHAOS
AND UNCERTAINTY,
WE ARE SADLY,
GLOBALLY ALIGNED**

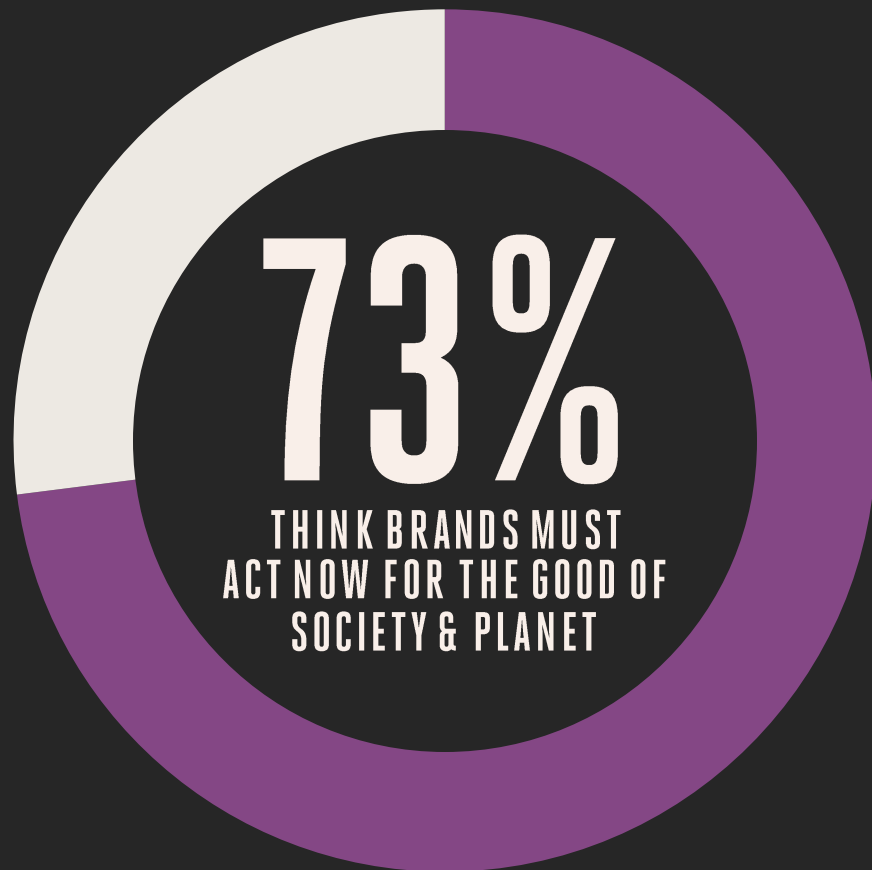
SOURCE: MEANINGFUL BRANDS™ 2021





Brand Trust is At an All Time Low In Many Parts of the World

YET EXPECTATION IS AT AN ALL TIME HIGH



SOURCE: MEANINGFUL BRANDS™ 2021

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PEOPLE NOT ONLY EXPECT BETTER BEHAVIOR – THEY ARE WILLING TO PAY MORE!

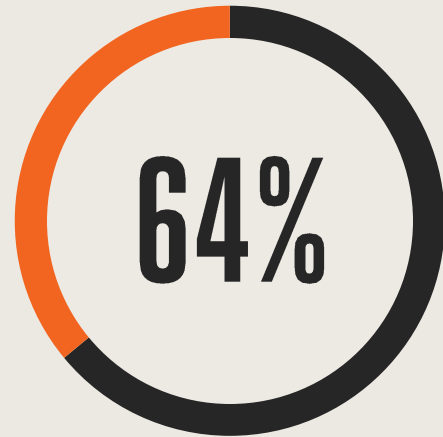
THREE QUARTERS OF GLOBAL CITIZENS FEEL WE ARE LIVING IN A GLOBAL CRISIS ACROSS FOUR KEY AREAS

SOURCE: MEANINGFUL BRANDS™ 2021



ARE READY TO PAY MORE FOR A BRAND THAT TAKES A STAND ON ENVIRONMENTAL AND SOCIAL ISSUES

+10
pts. vs. 2019



OF CITIZENS PREFER TO BUY FROM COMPANIES WITH A REPUTATION FOR HAVING A PURPOSE OTHER THAN JUST PROFITS

YOU CAN'T CON YOUR CONSUMER THEY ARE AWARE OF YOUR ACTIONS



FEEL SATISFIED WITH
COMPANIES' OR
BRANDS' CONCRETE
ACTIONS TO MAKE THE
WORLD A BETTER PLACE



OF CONSUMERS THINK
COMPANIES AND
BRANDS ARE
TRANSPARENT ABOUT
THEIR COMMITMENTS
AND PROMISES

BRANDS CONTINUE TO FOCUS ON FUNCTIONAL DELIVERY – IT'S IMPORTANT BUT NOT THE WHOLE PICTURE

DRIVERS' IMPORTANCE

39%

FUNCTIONAL

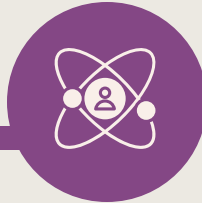


BRANDS' PERFORMANCE

4,73

32%

PERSONAL



4,06

29%

COLLECTIVE



4,27

Consumers are seeking more Personal and Collective Benefits to enhance their well-being



FUNCTIONAL

Deliver a good product / service

39% ▼ -2pts

- 108 Quality Prods ▼
- 106 Delivers ▼
- 105 Safe & Responsible ▼
- 104 Fair Prices
- 103 Leader ▼



PERSONAL

Improve peoples' lives

32% ▲ +2pts

- 112 Life Easier ▲
- 108 Peace of Mind ▲
- 108 Life Satisfaction
- 107 Show-off / Pride ▲
- 106 Me Happier



COLLECTIVE

Play a role in society & environment

29% =

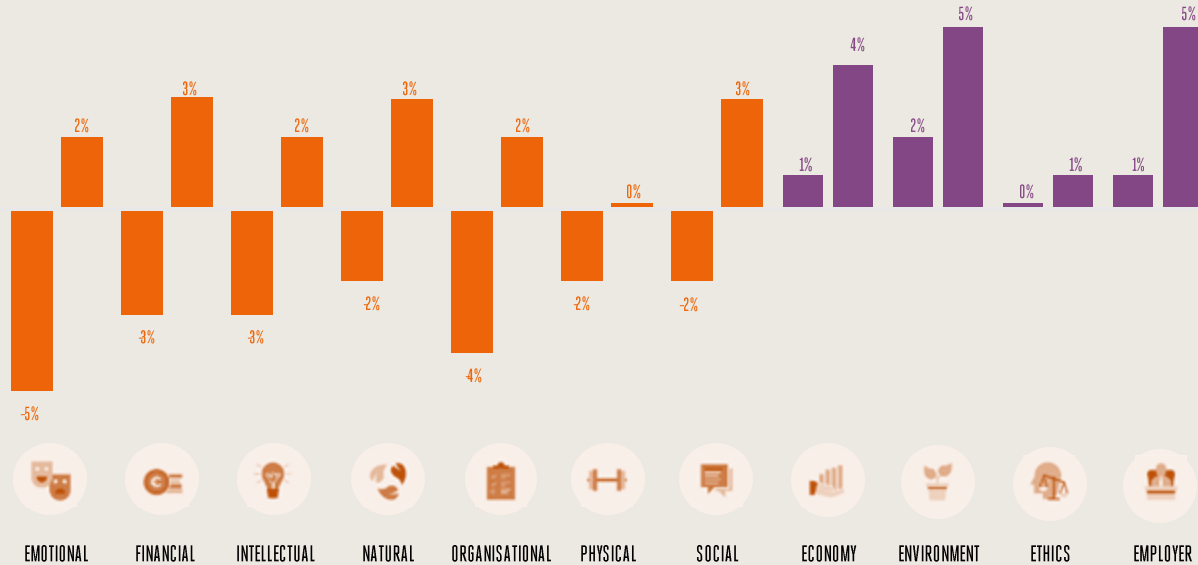
- 113 Transparent
- 110 Ethical
- 109 Benefits the Economy ▲
- 107 Good employer ▲
- 107 Jobs

WHILE THE SPIKE IN PERSONAL BENEFITS HAS BEEN INFLUENCED BY THE CRISIS COLLECTIVE BENEFITS HAVE BEEN TRENDING LONG TERM

EVOLUTION 2017-2019 & 2019-2021

NEAR TERM
OPPORTUNITIES
ACROSS **PERSONAL**
BENEFITS

LONG TERM
OPPORTUNITIES
ACROSS **COLLECTIVE**
BENEFITS



**This year, we looked
more widely at how
brands aim to deliver
against 'collective
benefits'**

**We analysed our study alongside the UN's
Sustainable Development Goals which also
aim to help brands truly deliver on purpose
and sustainability**


**MEANINGFUL
BRANDS**

**COLLECTIVE
BENEFITS**



**SUSTAINABLE
DEVELOPMENT
GOALS**

The UN set long-term, ambitious sustainable development goals to help achieve a better world for all, holding all sectors of society accountable.



« Our goal:

By 2030, achieve a better more sustainable future for all! **ENGAGE PEOPLE, COMPANIES AND GOVERNMENTS.** Our 17 sustainable development goals are an urgent call for action »

The SDGs Focus on: People, Planet, Prosperity

17 Sustainable Development Goals (SDGs)



End poverty in all its forms everywhere



Food security, nutrition & sustainable agriculture



Ensure healthy lives and well-being for all ages



Inclusive, quality & lifelong learning for all



Achieve gender equality & empower all women



Achieve sustainable water and sanitation for all



Ensure affordable, reliable, sustainable work for all



Sustained, inclusive and sustainable work for all



Inclusive and sustainable industrialization & innovation



Reduce income inequality within and among countries



Make cities inclusive, safe, resilient & sustainable



Ensure sustainable consumption & production patterns



Regulating emissions and promoting renewable energy



Sustainably use the oceans & marine resources



Protect ecosystems, combat desertification & biodiversity



Promote peaceful & inclusive societies with justice for all



Strengthen partnerships for sustainable development

MB Collective Benefit attributes mapped against the UN SDG Goals helps to identify the path forward for Brands



POVERTY



WOMEN'S RIGHTS



**ANTI-RACISM
DIVERSITY
MIGRANTS
SOCIAL LEADER
LGBT+ RIGHTS**



**RESPECTS NATURE
RESPECTS ANIMALS**



**FOOD WASTE
FOOD SECURITY**



**SUSTAINABLE
ENERGY**



DEVELOPMENT



HEALTHY LIVES



**BENEFITS THE
ECONOMY
JOBS
GOOD EMPLOYER**



**CLEAN SUPPLY CHAIN
SUST. CONSUMPTION
LOCAL SUPPLIERS
SUST. BRANDS**



**ETHICAL
DATA PROTECTION**



**EDUCATION
IMPROVE ACCESS**



**INVESTS
SUST. INNOVATIONS**



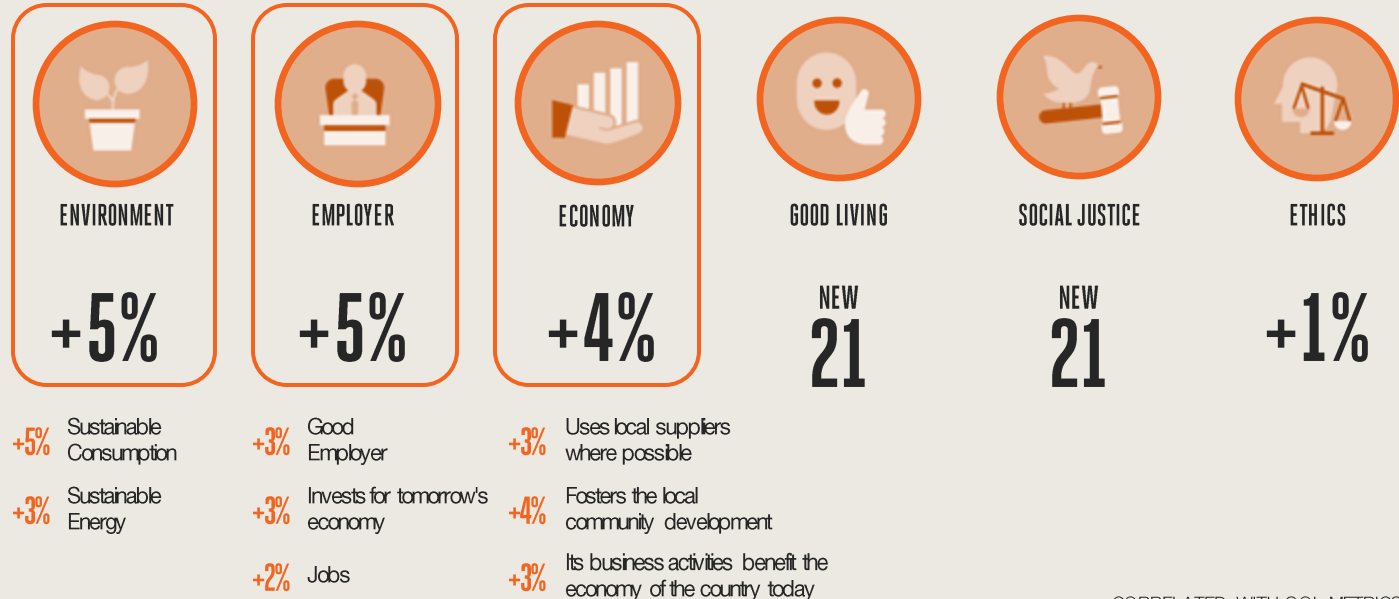
CLIMATE CHANGE

Globally, consumers increasingly expect brands to strengthen their collective pillar

Three specific dimensions saw a significant increase

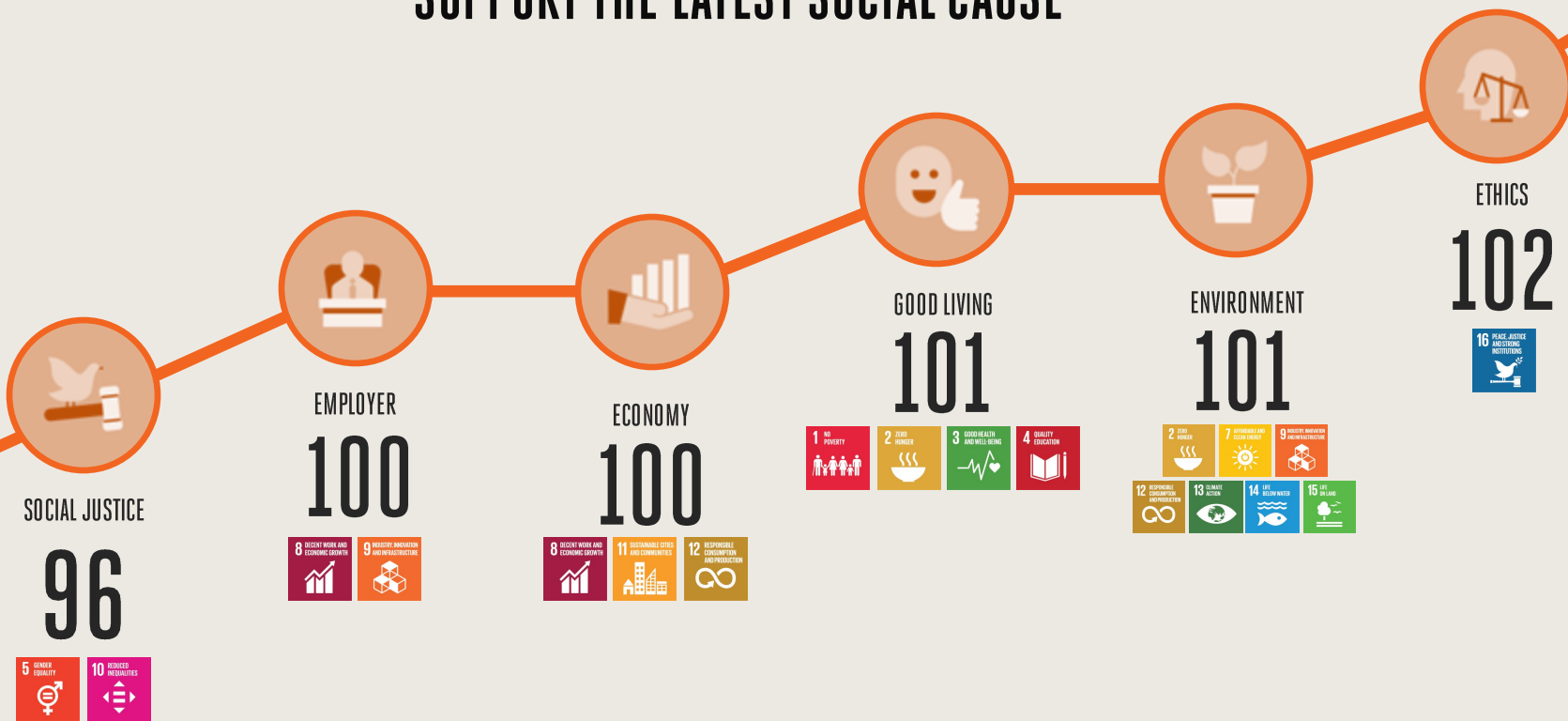


COLLECTIVE



CORRELATED WITH QOL METRICS

IT'S NOT JUST ABOUT JUMPING ON THE BANDWAGON TO SUPPORT THE LATEST SOCIAL CAUSE



MOST IMPORTANT DIMENSIONS EXPECTED BY CONSUMERS

CORRELATED WITH QOL METRICS

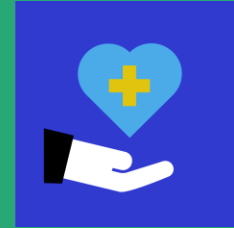
Brands should focus on what is most authentic to them

Building a better world starts at home



Food

- Zero hunger
- Resp Consumption & production
- Industry, innovation & infrastructure



Healthcare

- Good health & well-being
- Decent work & economic growth
- Resp. Consumption & production



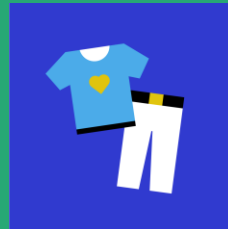
Transport

- Decent work & economic growth
- Resp. Consumption & production
- Industry, innovation & infrastructure



Consumer electronics

- Decent work & economic growth
- Industry, innovation & infrastructure
- Resp. Consumption & production



Apparel

- Resp. Consumption & production
- Reduced inequalities
- Industry, innovation & infrastructure

What key area should your Brand focus on?

The overlay helps easily pinpoint where Brand deficits and opportunities lie



POVERTY



WOMEN'S RIGHTS



**ANTI-RACISM
DIVERSITY
MIGRANTS
SOCIAL LEADER
LGBT+ RIGHTS**



**RESPECTS
NATURE
RESPECTS
ANIMALS**



**FOOD WASTE
FOOD SECURITY**



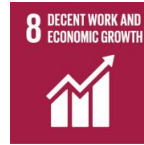
**SUSTAINABLE
ENERGY**



DEVELOPMENT



HEALTHY LIVES



**BENEFITS THE
ECONOMY
JOBS
GOOD EMPLOYER**



**CLEAN SUPPLY CHAIN
SUST. CONSUMPTION
LOCAL SUPPLIERS
SUST. BRANDS**



**ETHICAL
DATA
PROTECTION**



**EDUCATION
IMPROVE ACCESS**



**INVESTS
SUST. INNOVATIONS**



CLIMATE CHANGE

Based on the outcome, brands can focus their efforts on the areas of opportunity that are most essential for them to address



COLLECTIVE BENEFITS

Attributes Identified

e.g.

- Education
- Improve access

UN SDG GOAL



UN SDG RESOURCES

Education

Teach For People

Investing in education is essential to developing a skilled workforce for the future and ensuring economic growth. Although the number of children in the world has grown, the number of primary schools has not changed. Even those who do attend school don't always learn to read and write. Disadvantaged children miss out on quality learning opportunities. This occurs despite international affirmation of the right to education.

Continued educational resources and poverty often limit access to education, particularly for girls. Students learn in school don't always match up with workplace needs.

Quality Education

Goal 4. Ensure inclusive and equitable quality education and promote lifelong learning opportunities for all

- Why business should support education
- A Framework for Business Engagement in Education
- Children's Rights and Business Principles
- Principles for Responsible Management Education
- From our library
- Additional Tools: SDG Compass; SDG Matrix

e.g.

- Clean supply chain
- Sustainable Consumption
- Local Suppliers
- Sustainable Brands



Supply Chain Sustainability

A company's entire supply chain can make a significant impact on pressing human rights, labor, climate, environmental, and socio-economic issues.

However, UN Global Compact participants have supply chain practices that challenge improving their sustainability performance. Investing in companies' best practices can help them create a more ethical, resilient, and comprehensive of many supply chains.

The UN Global Compact encourages companies to make sustainable the top of the organization. If the chief executive owns the supply chain, of their workforce and community, the company can set expectations and conditions across its supply chain. These can include better supply chain training, auditing, and innovation.

Setting up processes to ensure collaboration with an organization's main buyers/suppliers, can affect the supply chain. For example, product development and marketing can be done in support of better.

Responsible Consumption and Production

Goal 12. Ensure sustainable consumption and production patterns

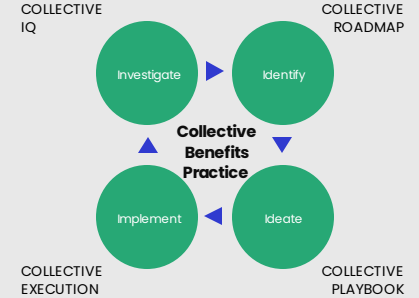
- Why business should support supply chain sustainability
- Global Compact Management Model
- Global Reporting Initiative
- From our library
- Additional Tools: SDG Compass; SDG Matrix

HAVAS EXPERTISE

Investigate > Identify > Ideate > Implement

COLLECTIVE BENEFITS

Our bespoke approach to boosting a brand's Collective Benefits



The Collective Benefits Practice comprises 4 stages with individual inputs

Age of Cynicism

QUESTIONS TO CONSIDER

GAIN TRUST THROUGH TRANSPARENCY

- How trustworthy is your brand considered to be based on past and current actions? Are there / Where are the gaps?
- Do your communication goals align with your brand heritage?
- What specific collective attributes connect with your brand that enables you to organically get more involved?
- How can your brand's content strategy more authentically connect with consumers?

PURPOSE OVER PROFIT

- How can your client leverage the Havas 'Collective Benefits' Tool to better inform communication strategies?
- What SDG's are the lowest hanging fruit that your brand can genuinely align to and consider to take greater action?
- What are first steps your brand can take to workshop a gap analysis on your current sustainability standing vs. the SDGs?

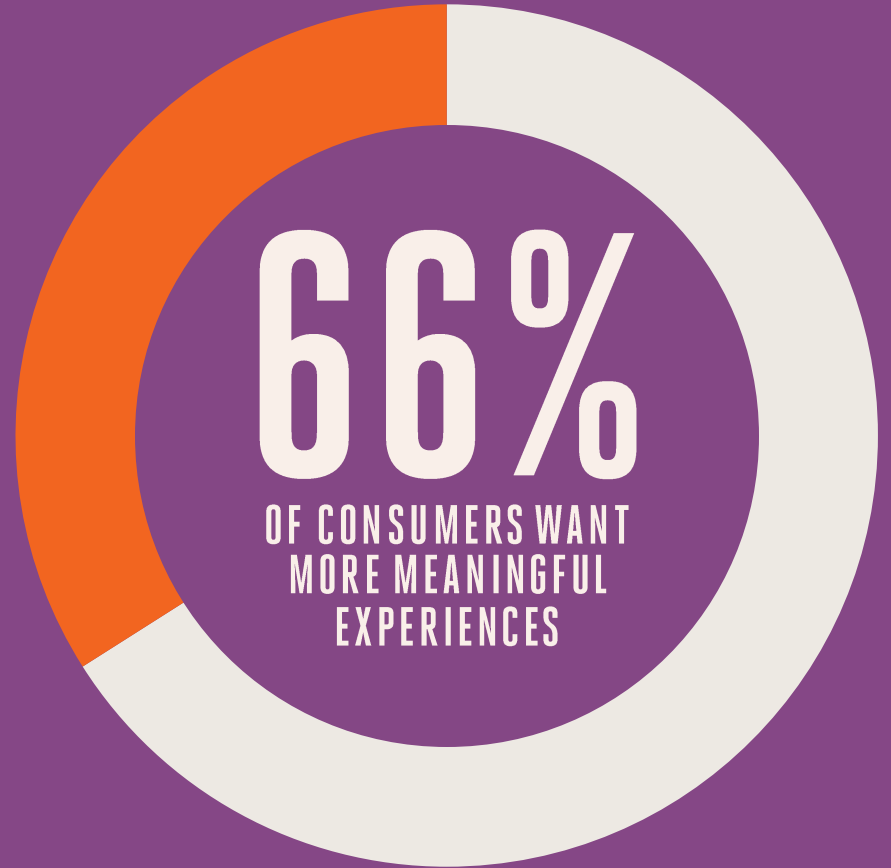


THE AGE OF CYNICISM

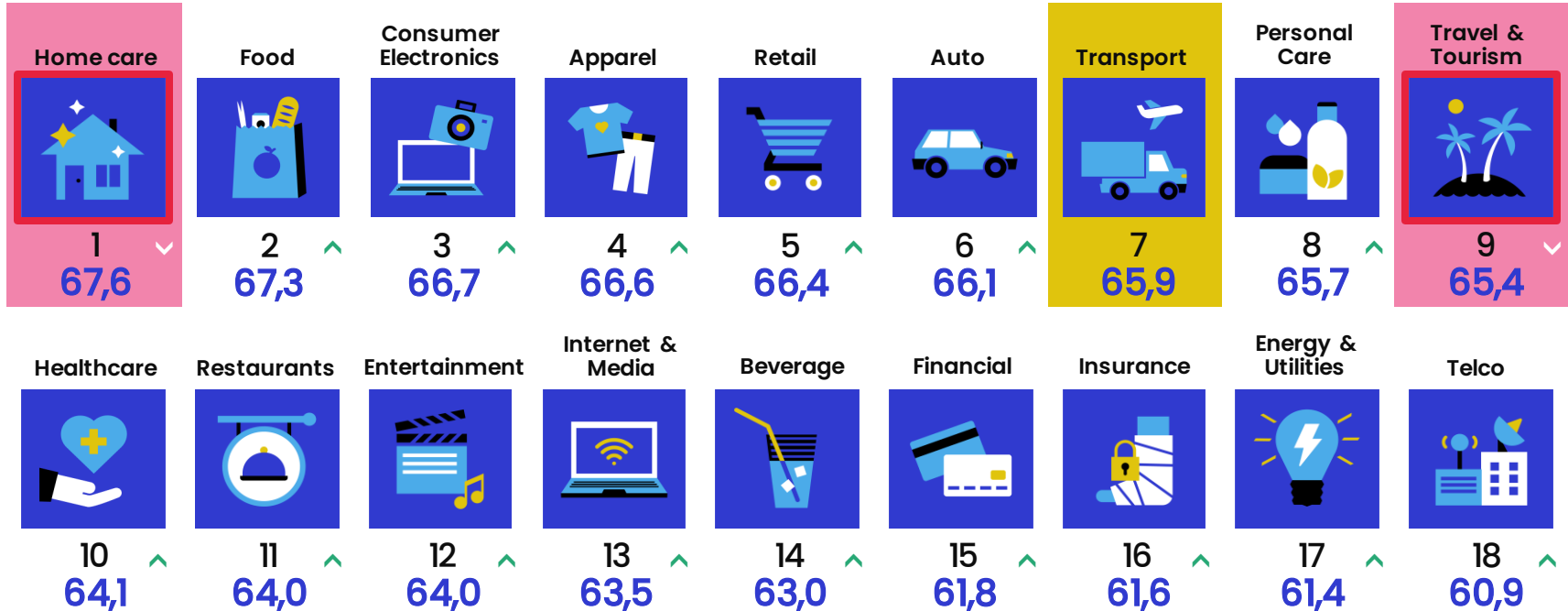
ADDITIONAL OBSERVATIONS

BRANDS' STATUS ELEVATED BY INCREASING PERSONAL AND COLLECTIVE BENEFITS

TOP 30 BRANDS



Overall, most categories gain in meaningful score



MOST MEANINGFUL GLOBAL BRANDS 2021

Google

75,0

PayPal

72,9

WhatsApp

72,1

YouTube

71,8

SAMSUNG

71,7

Microsoft

71,7

Walmart

71,5

Cadbury

71,4

VISA

71,3

IKEA

71,1

LIDL

70,9

ALDI

70,8

NIVEA

70,4

adidas

70,3

SKIP

70,3

DANONE

70,2

Nike

70,0

LEGO

69,9

LEROYMERLIN

69,6

NETFLIX

69,6

FIFA

69,5

Nestlé

69,5

Colgate

69,4

SONY

69,4

Booking.com

69,4

Dove

69,3

Disney

69,1

Heinz

69,0

Kellogg's

69,0

Gillette

68,9

BRANDS THAT FOCUS ON PERSONAL AND COLLECTIVE BENEFITS RESONATE MORE WITH CONSUMERS



A GLOBAL BRAND IS A BRAND ASSESSED IN AT LEAST 3 MARKETS AND 2 REGIONS IN MB21, AND AVAILABLE WORLDWIDE.

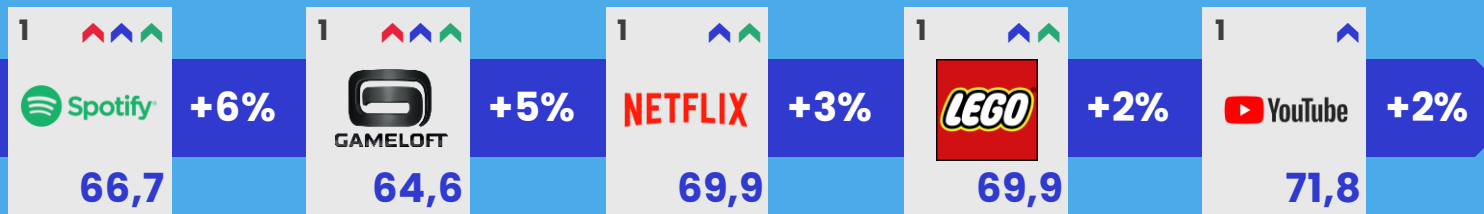
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The categories and brands that saw accelerated growth is not surprising given the behavioral changes shaped by the cultural backdrop

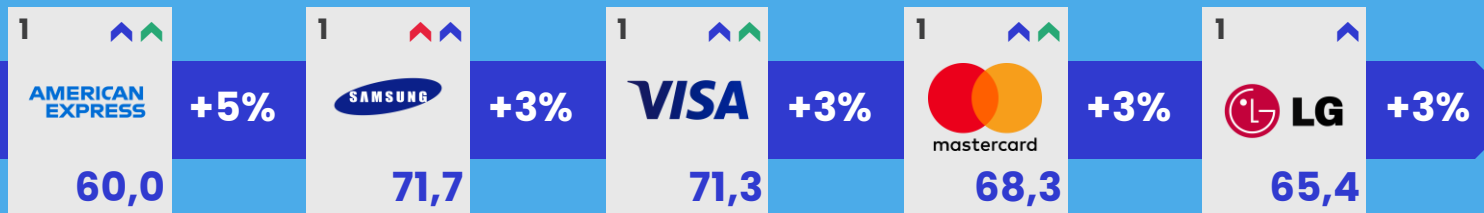
ACCESSIBLE RETAIL



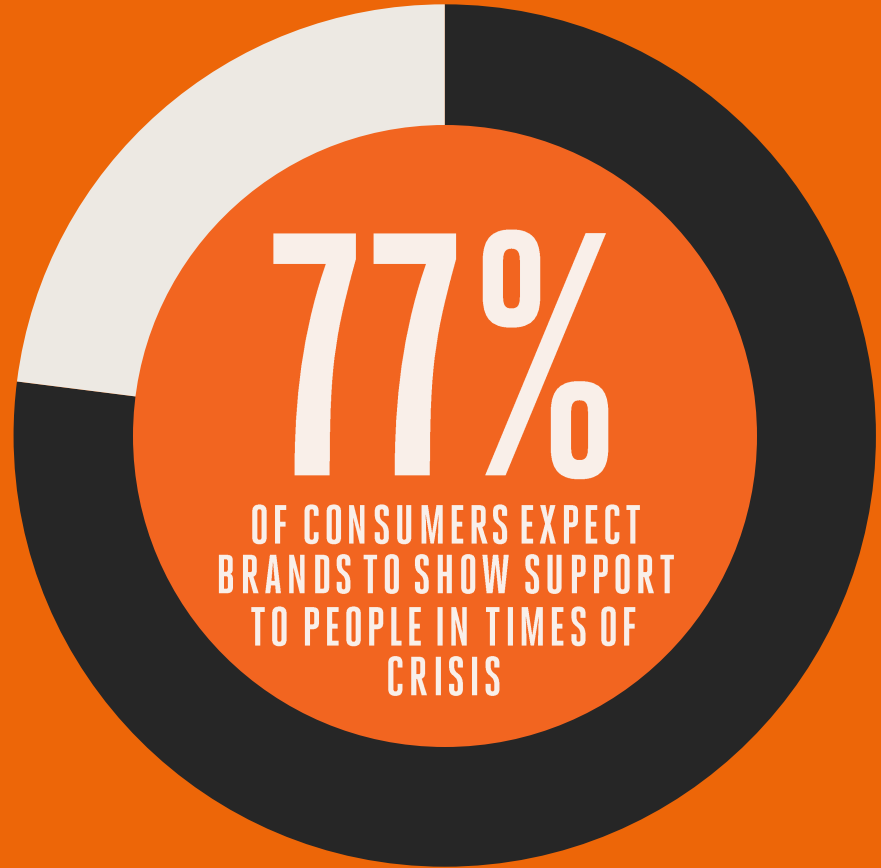
HOMETAINMENT



TECH SOLUTIONS

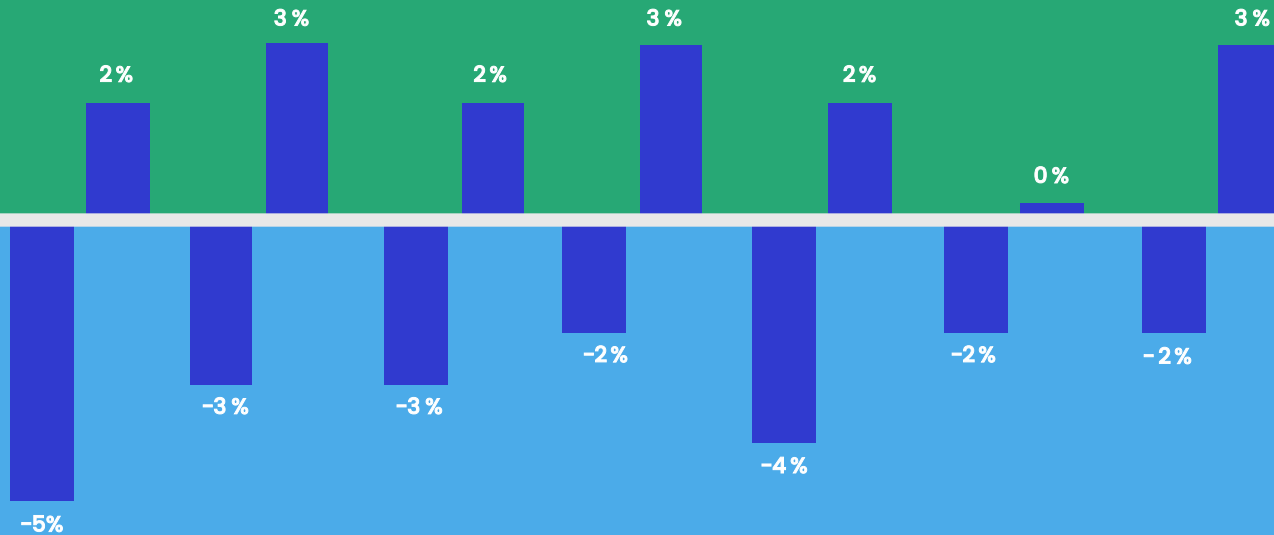


**THERE ARE IMMEDIATE
OPPORTUNITIES TO
FORGE MEANINGFUL
CONNECTIONS IN THE
SHORT TERM**



The crisis brought a greater need for **personal benefits** to be met today

Evolution 2017-2019 & 2019-2021



Emotiona



Financial



Intellectual



Natural



Organisational



Physical

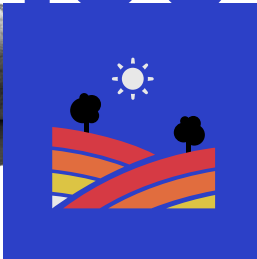


Social



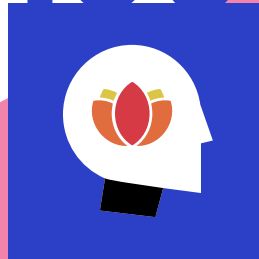
Consumers expect brands to help in decreasing life's stressors

109



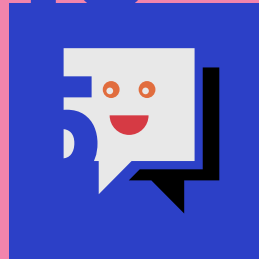
Makes my life easier

106



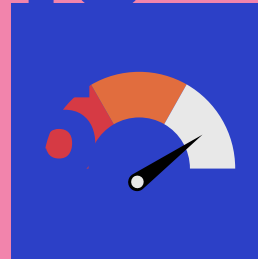
Gives me peace of mind

10



Helps me feel truly happy

10



Helps me feel content in my daily life



PERSONAL

PHYSICAL



=

SOCIAL



+3%

NATURAL



+3%

FINANCIAL



+3%

ORGANISATIONAL



+2%

INTELLECTUAL



+2%

EMOTIONAL



+2%

**SPECIFIC DIMENSIONS HAVE ALSO INCREASINGLY
BECOME MORE IN DEMAND**



SOCIAL

+3%

Makes me feel part of a group

+3%

Helps me to share experiences/moments with others

+2%

Helps me to connect with people and/or meet new people



NATURAL

+4%

Inspires me to make the world a better place

+2%

Enables me to be more environmentally friendly



FINANCIAL

+3%

Helps me save money

+3%

Helps me grow my wealth

The attributes within each that have become more important to consumers, follow the theme of focusing on people, the planet, and prosperity

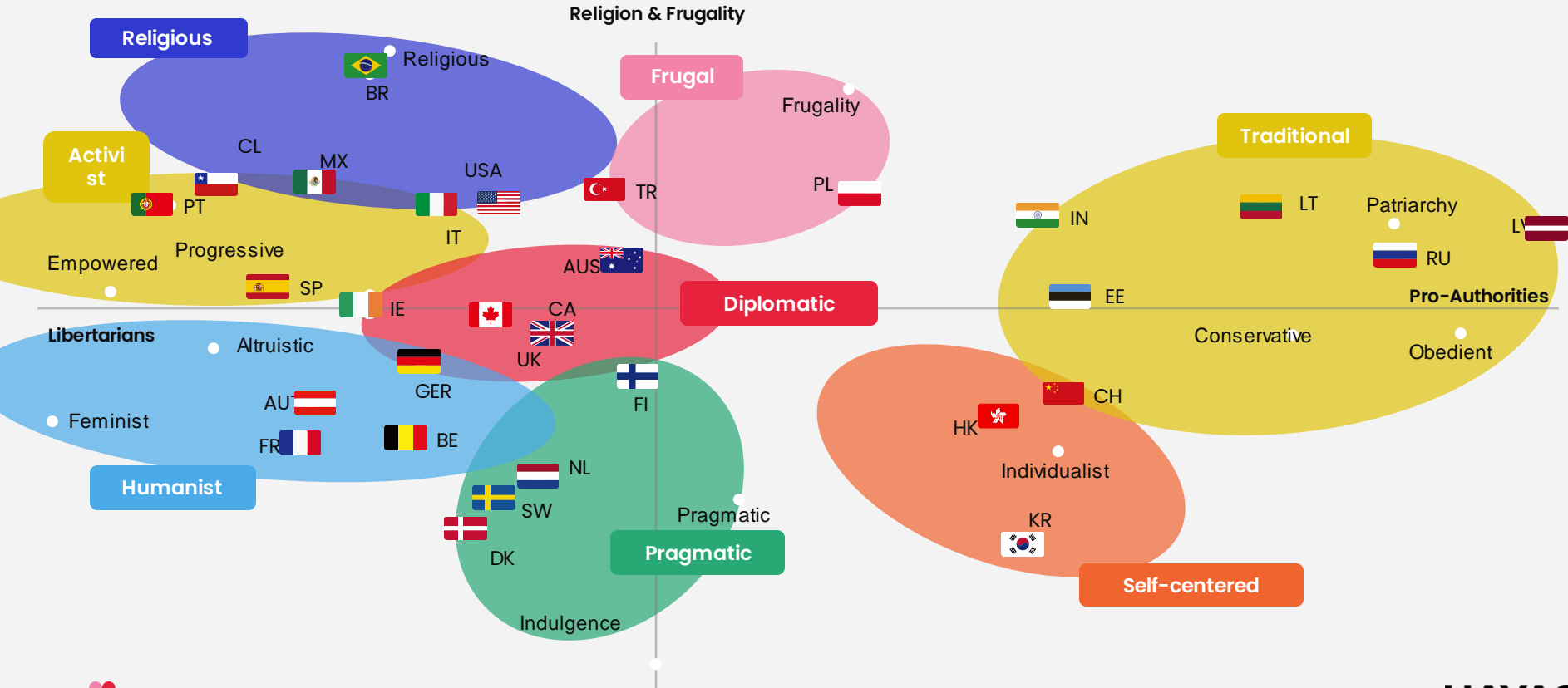


East Meets West

**Cultural
intricacies
matter:**

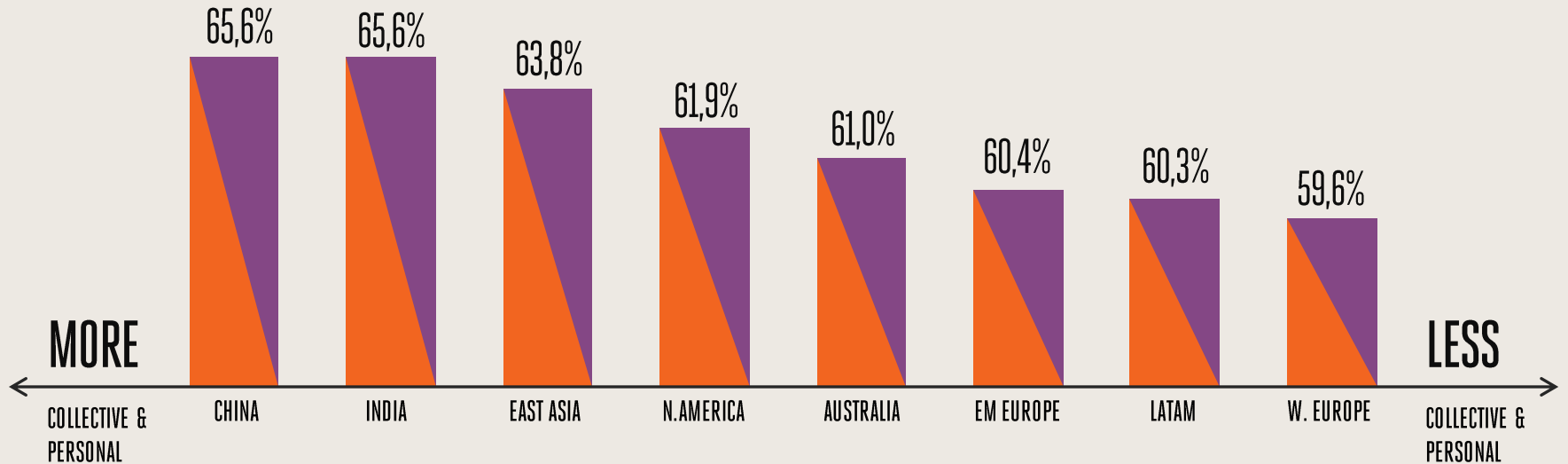
**'we' vs. 'me' mentality influences
expectations**

Cultural ethos defines what is right in societies



THERE IS A HIGHER EXPECTATION IN THE EAST FOR PERSONAL AND COLLECTIVE BENEFITS COMPARED TO THE WEST

SURPRISINGLY, LATAM IS ON PAR WITH EUROPE



Personal Benefits:

After organizational and emotional benefits, unsurprisingly, consumers in APAC seek to connect while Western countries seek more individual gains



- CORRELATED WITH QoL METRICS

Collective Benefits:

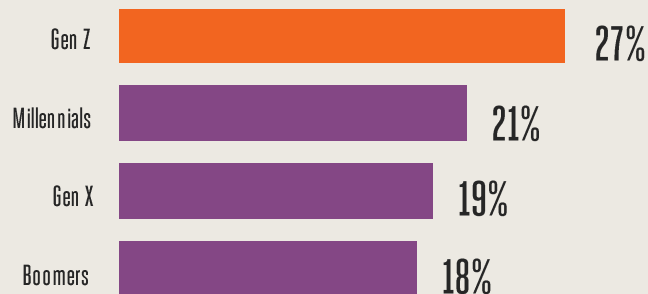
Clearly influenced by the impacts of the cultural landscape specific to a region, morality is top of mind for Western countries while Asian countries place top importance on the environment



Gen Z is an open-minded generation who seek individuality and don't mind questioning society 'rules'

GEN Z ARE MORE LIKELY TO SPEAK THEIR MINDS AND CHALLENGE TRADITIONAL CONSTRUCTS THAN OTHER GENERATIONS

PEOPLE SHOULD DARE TO DISOBEY AND PROVOKE TO REALLY HAVE A SAY



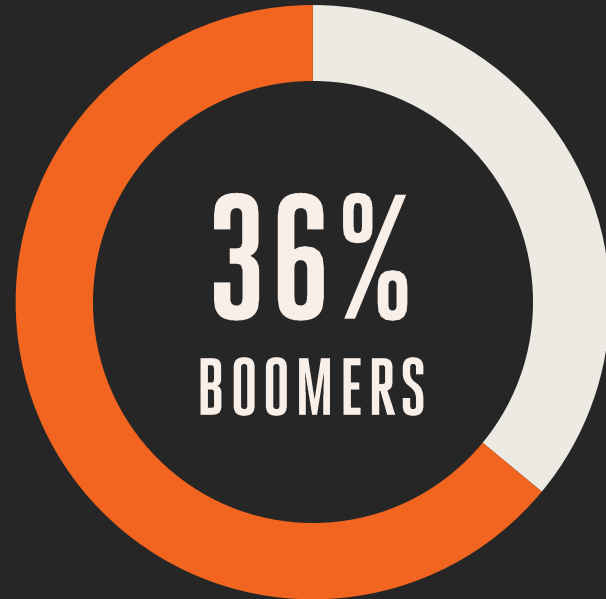
SEX-ROLES ARE PURELY SOCIAL CONSTRUCTIONS
(OUTSIDE CHILDBEARING)



BRANDS THAT ENABLE THEM TO CONVEY THEIR INDIVIDUALITY PIQUE THEIR INTEREST



Vs



Gen Z is particularly focused on Reduced inequalities

Inclusion and Expression of Self are of paramount importance for this generation

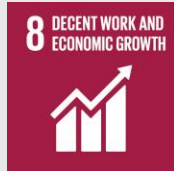
GEN Z



109



109



107

TOTAL POPULATION



107



106



105

BOOMERS (+56 YO)



109



108



106

- CORRELATED WITH QOL METRICS

Gen Z have extra heart for brands that take effective action and are accepting of all people

Takes a lead on social issues

105

Embraces diversity

102



5

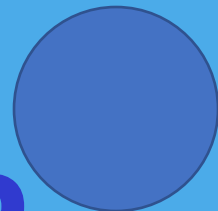
Meaningful Content:

Nearly half of content
fails to deliver

Compared to pre Covid,
'Help' Content is on the rise

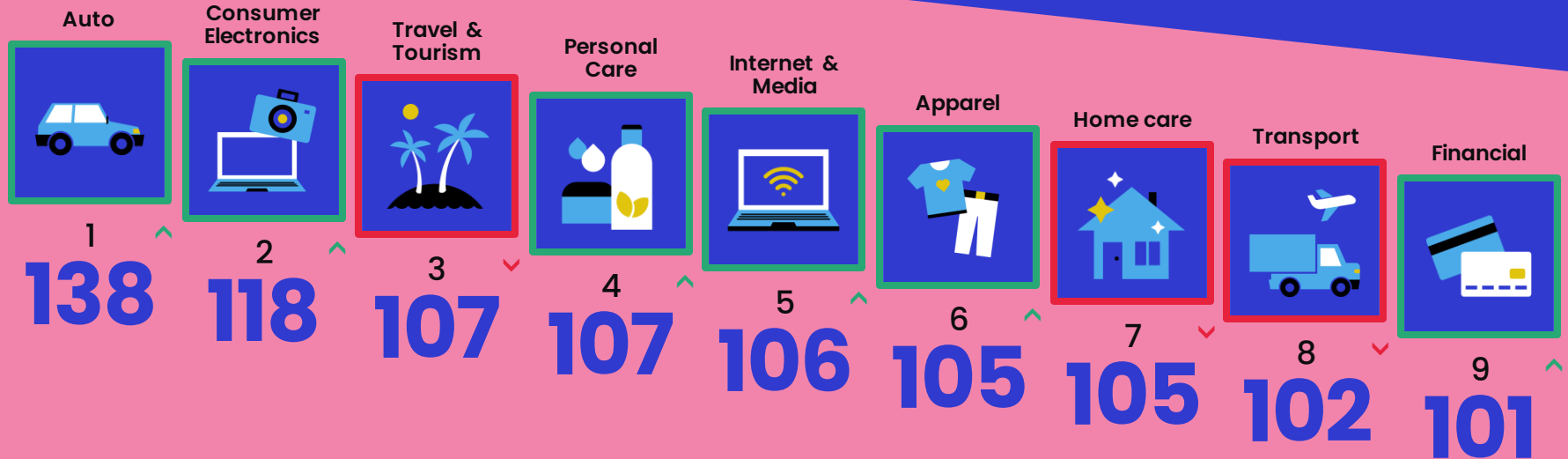
48%

of the content
provided by Brands
is not meaningful to
Consumers



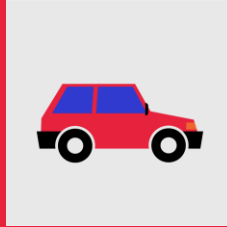
Content effectiveness varies by industry

Categories that had limited engagement due to govt safety measures were negatively impacted



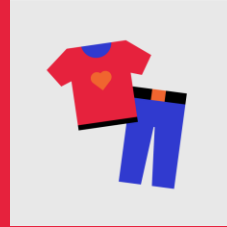
The most expected roles of content are **to Reward and Inspire**

AUTO



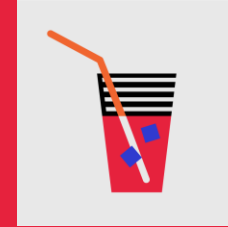
1. Help
2. Inform
3. Reward

APPAREL



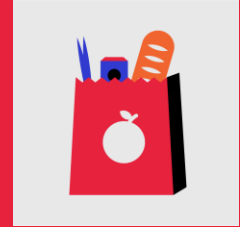
1. Reward
2. Entertain
3. Inspire

BEVERAGE



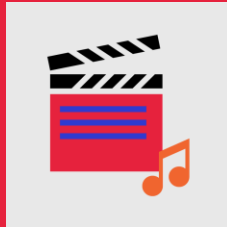
1. Entertain
2. Reward
3. Inspire

FOOD



1. Help
2. Inspire
3. Reward

ENTERTAINMENT



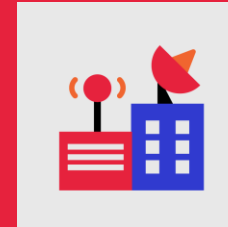
1. Reward
2. Entertain
3. Inspire

INTERNET & MEDIA



1. Entertain
2. Inspire
3. Help

TELCO



1. Help
2. Reward
3. Inform

PERSONAL CARE

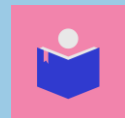


1. Help
2. Inspire
3. Inform

Standard
Already fulfilled

Least
expected

Secondary
Do not focus
only here



EDUCATE



ENTERTAIN



INSPIRE

Most
associated



HELP



INFORM

Must Have
Have to be there

Most
expected



REWARD






Least
associated

Opportunity
Potential
differentiation
lever

However,
HELP is the
content role
that grew in
importance
and topped
the list of
content
expected from
Global Brands

What you say is as important as how you say it

ASSOCIATED CONTENT TYPE ACROSS DIFFERENT POINTS IN A CONSUMER DECISION JOURNEY

 FAMILIARITY	 CONSIDER PREMIUM PRICE	 PURCHASE	 ADVOCACY	 RE-PURCHASE
108 Long movie	115 Personalities' Testimonial	111 Celebrities' collaboration	107 TV / Billboards / Radio / Magazine	108 Books / E-Books
106 Books / e-books	115 Celebrities' collaboration	111 Personalities' Testimonial	106 Newspaper / magazines	108 Long movie
106 Educational material	113 TV / Billboards / Radio / Magazine	111 TV / Billboards / Radio / Magazine	105 Audio content/services	108 Educational material
106 Documentary	112 Newspaper / magazines	109 Audio content/services	105 Short movie / video	107 Audio content / services
106 Short movie / video	110 Brand Photo on Social Media	109 Newspaper / magazines	105 TV show	106 Documentary
106 Audio content / services	110 Audio content/services	108 Party / Dinner	104 Personalities' Testimonial	106 Short movie / video
105 TV show	107 Party / Dinner	108 Short movie / video	104 Long movie	104 TV show
104 AR experience	107 Music video	108 Brand Photo on Social Media	104 Celebrities' collaboration	104 Organizational Tool/App
104 Music video	106 Video game & online game	108 Music video	104 Party / Dinner	104 Newspaper / magazines
103 Party / dinner	106 Short movie / video	107 TV show	104 Music video	104 Music video

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