



MEANINGFUL
BRANDS

powered by HAVAS GROUP

WELCOME TO MEANINGFUL BRANDS® 2017

‘Driven by their increased interconnectivity, audiences have now become media platforms in their own right. It’s now more important than ever to effectively engage these audiences so that they will propel your brand’s values, messages and drive loyalty, recommendation and ultimately, sales.’

We also live in a world of content overload. A world where every day 500 million tweets, 4.3 billion Facebook messages and 500 million hours of YouTube footage are sent, posted and uploaded. In this world, only brands that form more meaningful connections with people will prosper. Brands need to know why people care, and what makes their brands meaningful.

We’ve found the answer with our unique analysis into brand meaningfulness, which measures, tracks and compares the different relationships people have with brands. To celebrate 8 years of research, this year we look closely at the power of meaningful content. We reveal some surprising statistics on the effectiveness and under-performance of content produced by the world’s leading 1,500 brands.

In fact, Meaningful Brands® 2017 gives us the same wake-up call we delivered back in 2008 when we demonstrated that most people wouldn’t care if the majority of brands disappeared tomorrow.’

Yannick Bolloré,
Chairman and CEO, Havas Group

CREATE

SUMMARY REPORT

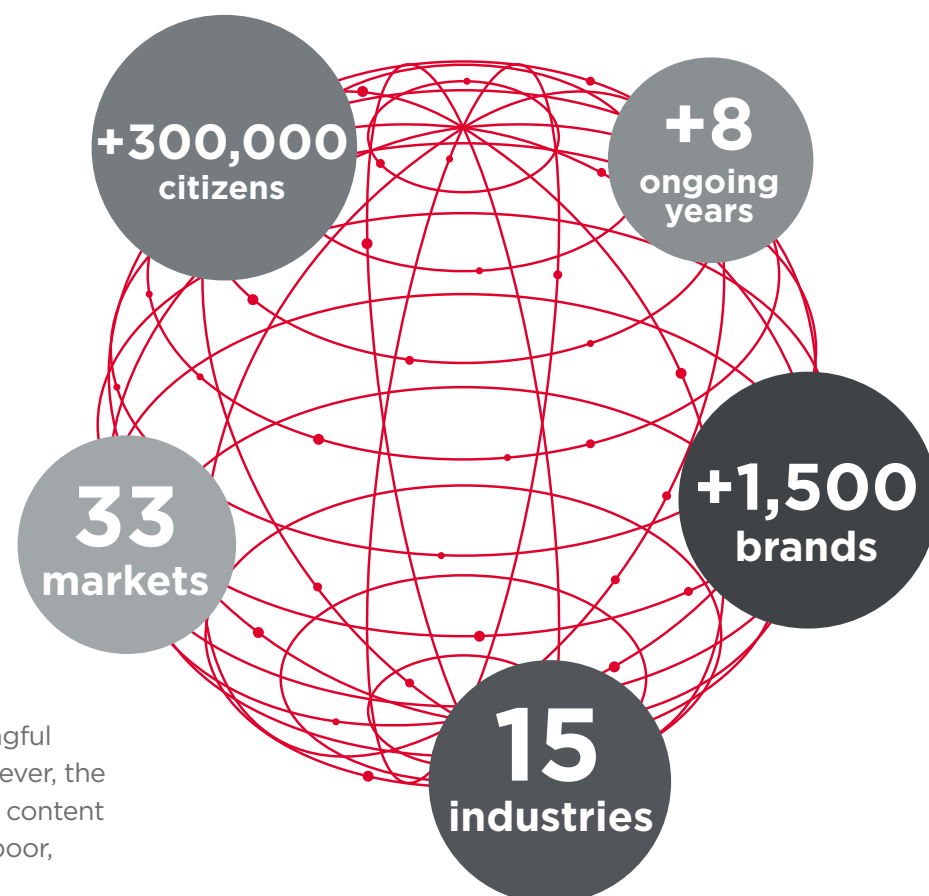
MEANINGFUL BRANDS® OUTPERFORM STOCK MARKET BUT TOO MANY BRANDS ARE FAILING TO DELIVER.

The 2017 **Meaningful Brands®** global analysis found the highest ranked brands outperformed the stock market by 206% over a ten-year period between 2006 and 2016.

This year we also analysed the role of content and found a direct correlation between being meaningful and delivering great content. However, the study also discovered that 60% of content created by brands is found to be poor, irrelevant or failing to deliver.

This unique piece of biennial research now covers 1,500 global brands and more than 300,000 interviews. We take an in-depth look at 33 international markets and 15 different industry sectors.

Meaningful Brands® is recognised worldwide as a proprietary metric of brand strength and the only global framework to connect brands with human wellbeing.



This year's **Meaningful Brands®** analysis also reveals new data that tracks the relationship between a brand's performance, its meaningfulness and the content it produces.

The results show that content delivered by brands is under-performing to such an extent that it's having little impact on business results or people's lives.

KEY FINDINGS FROM MEANINGFUL BRANDS® 2017

outperforming the market by 206%

Meaningful Brands have outperformed the stock market by a staggering 206% over a ten-year period between 2006 and 2016.

71% correlation between content effectiveness and personal wellbeing

There's a 71% correlation between content effectiveness and the impact a brand has on our personal wellbeing, quality of life, plus its Meaningful Brands® ranking.

9x increase in share of wallet

Meaningfulness in brand marketing can increase share of wallet by up to nine times.

137% KPI increase

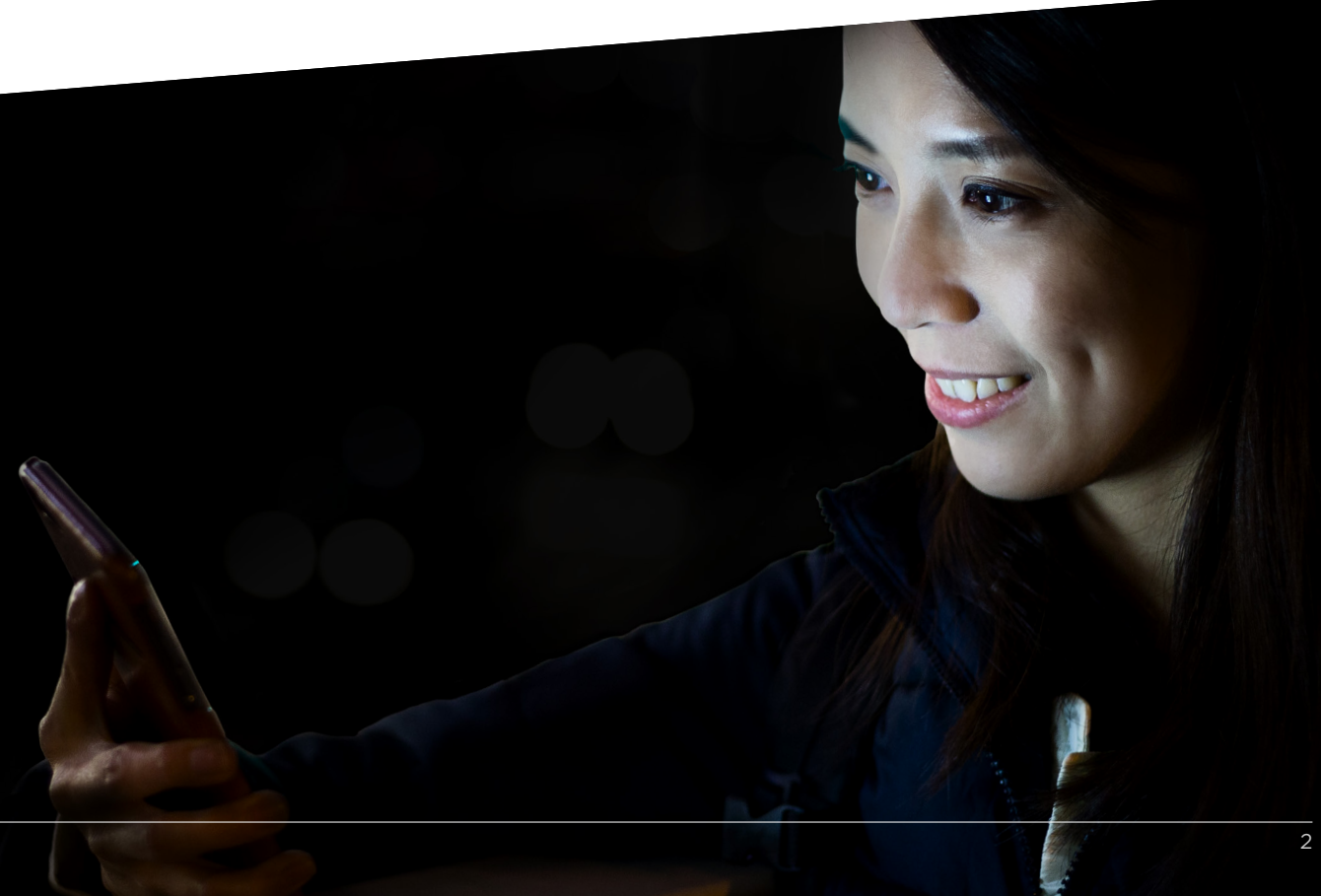
Meaningful Brands can increase their KPIs by up to 137%.

For every 10% increase in meaningful performance, some of the most common KPIs grow by:

- +3% familiarity**
- +7% overall impression**
- +10% purchase**
- +5% repurchase**
- +7% advocacy**
- +12% premium pricing**

Maria Garrido, Global Chief Insights & Analytics Officer, Havas Media Group.

'For 2017, we've used the statistical might behind **Meaningful Brands®** to gain a better understanding of the role content has for the brand and the purpose it serves for people. Surprisingly, the data demonstrates an alarming ineffectiveness of existing brand content. Our expectations for the role or the types of content are simply not being met.'



WHY MEANINGFULNESS MATTERS

There is little benefit for people in the current value exchange with brands.

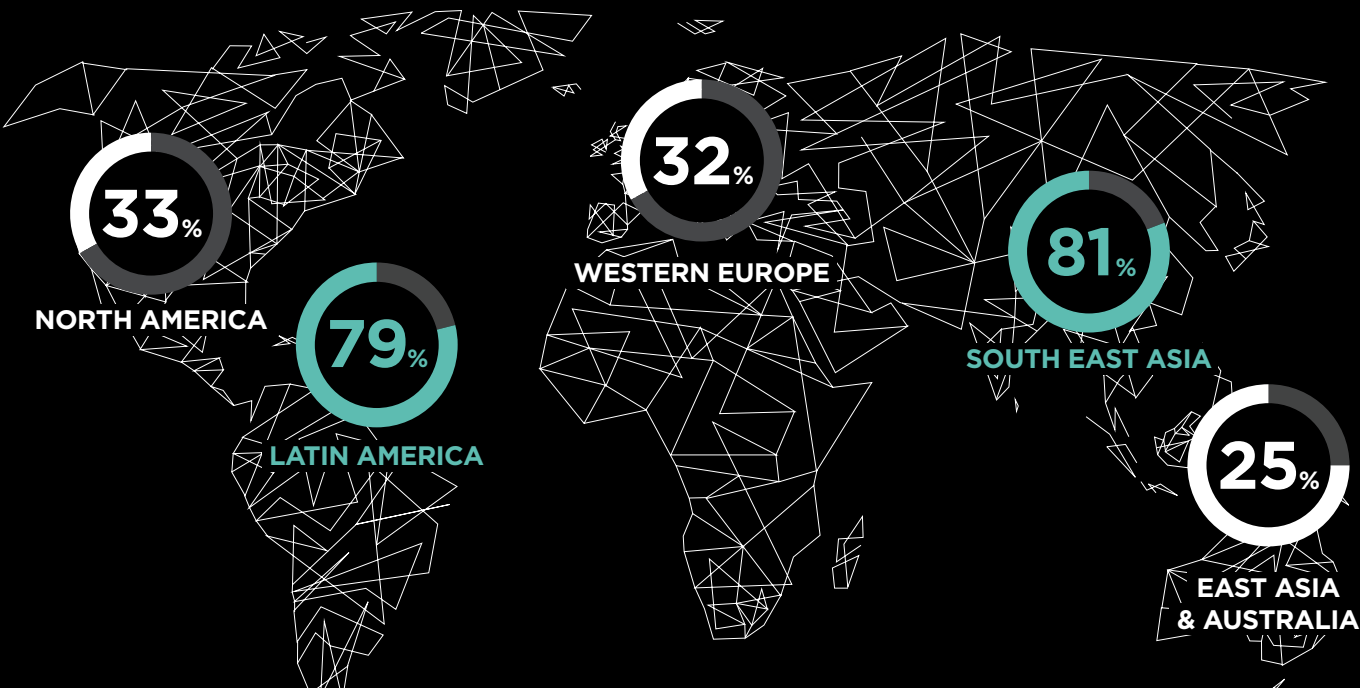
74%

People wouldn't care if 74% of the brands they use every day just disappeared.

27%

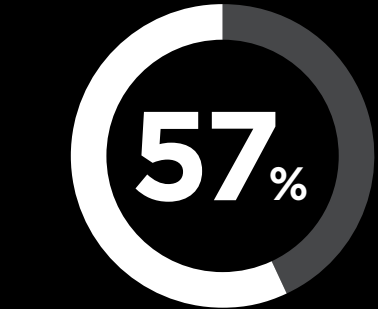
Less than 27% of the brands we use notably improve our quality of life and wellbeing.

WORLDWIDE TRUST IN BRANDS:



● In Western Europe, only 32% are trusted. In North America, only 33% are trusted, while in East Asia and Australia only a quarter of all brands are trusted.

● Parts of the world where companies enjoy greater brand trust include Latin America with 79% and South East Asia with 81%. However, even in these high-trust regions, people don't feel as though the brands they buy help to improve their quality of life.



Only 57% of brands worldwide are trusted.

UNDERSTAND WHAT MATTERS

Brands that go beyond the product and make a positive, tangible impact on what matters to us, gain a greater share of our lives. These brands are rewarded with stronger attachments and deeper audience connections, which in turn, helps reinforce trust.

The generation that expects the most from brands is millennials, 77% of whom demand useful, interesting or meaningful content, along with services that go beyond a brand's core remit.



Personal Benefits
(save time, life made easier, peace of mind or happiness improvement)



Collective Benefits
(community, workplace, ethical or environmental)



Functional Benefits
(quality, category leader, safe & responsible)

BUSINESS SUCCESS FROM MEANINGFULNESS



STOCK MARKET

Meaningful Brands have outperformed the stock market by a staggering 206% over a ten-year period between 2006 and 2016.

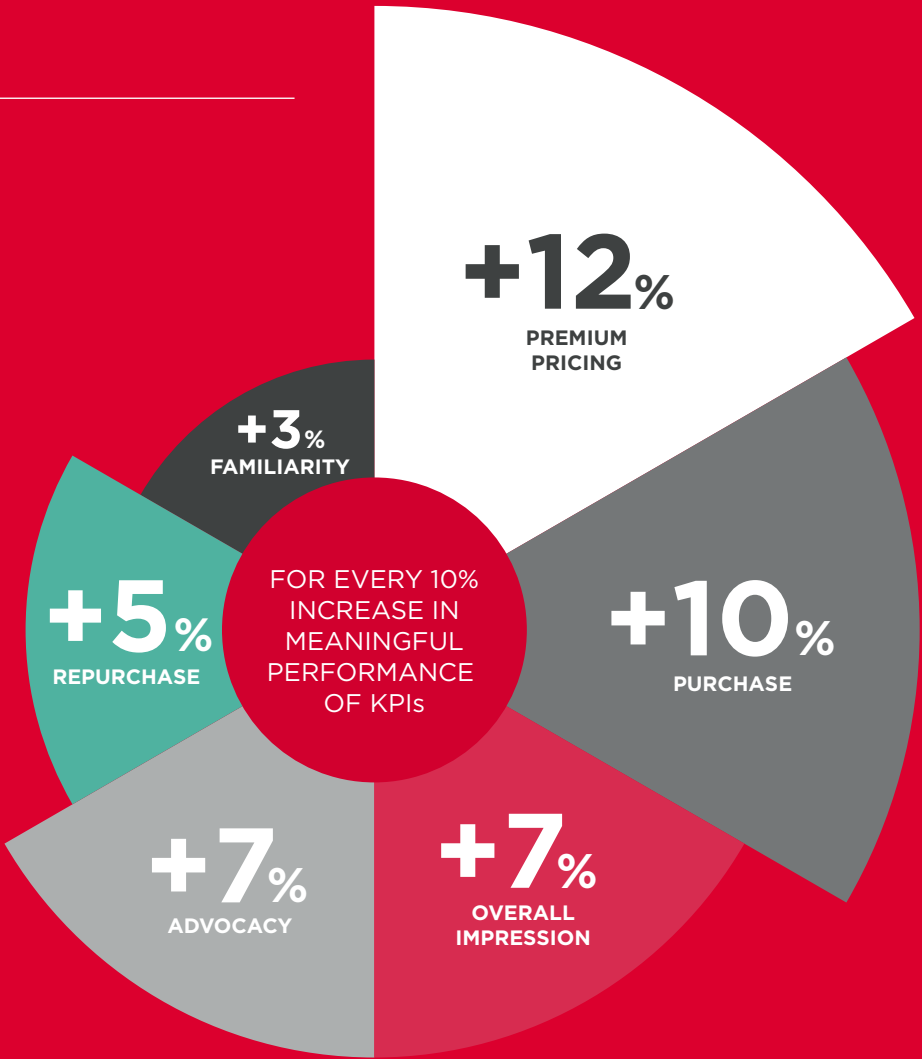


SHARE OF WALLET

Incremental rises in meaning give brands the potential to increase their share of wallet by as much as nine-fold.

KPI PERFORMANCE:

For every 10% increase in meaningful performance, some of the most common KPIs grow by:



WHICH ARE THE WORLD'S MOST MEANINGFUL INDUSTRIES?



SO WHO ARE THE WORLD'S MOST MEANINGFUL GLOBAL BRANDS OF 2017?

Digital brands led the way in 2016, thanks to the difference they make on both functional and personal benefits.

1	GOOGLE
2	PAYPAL
3	WHATSAPP
4	YOUTUBE
5	SAMSUNG
6	MERCEDES-BENZ
7	NIVEA
8	MICROSOFT
9	IKEA
10	LEGO
11	COLGATE
12	WIKIPEDIA
13	AUDI
14	MARRIOTT
15	BMW
16	DISNEY
17	APPLE
18	NESTLE
19	TOYOTA
20	ARIEL
21	WALMART
22	AMAZON
23	LAND ROVER
24	KELLOGG'S
25	SHERATON
26	GILLETTE
27	NIKE
28	HONDA
29	VISA
30	20TH CENTURY FOX

THE CONTENT STORY

What do we already know about content's role in meaningfulness?

A meaningful brand is defined by its impact on our personal and collective wellbeing, plus its functional benefits.

Content's role is to educate, inform, entertain, inspire, reward and help.

Great content is a great driver of personal wellbeing and therefore meaningfulness.

The correlation between how a brand performs on improving personal wellbeing and the strength of its content is 71%.

84% of people expect brands to provide content that:

- Entertains
- Tells stories
- Provides solutions
- Creates experiences and events

THE WAKE-UP CALL

71%

correlation between content effectiveness and personal wellbeing.

There's a 71% correlation between content effectiveness and the impact a brand has on our personal wellbeing, quality of life, plus its Meaningful Brands® ranking.

75%

expect brands to make contribution

75% of us expect brands to make more of a contribution to our wellbeing and quality of life, yet only 40% believe brands are doing so.

60%

of content is failing to deliver

60% of all content produced by brands is declared as poor, irrelevant or failing to deliver.

TWO DICHOTOMIES OF BRAND MEANINGFULNESS:

1 Brand performance around personal benefits is at its weakest in 2017.

Yet the more meaningful brands over-perform on personal benefits by as much as 83%.

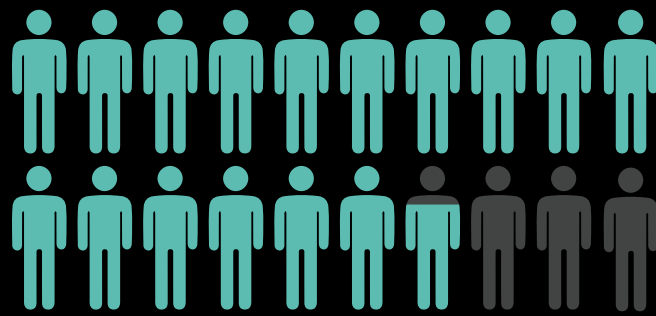
2 There's a 71% correlation between how a brand performs around personal benefits and the effectiveness and relevancy of the content it produces.

Yet 59% of the content provided by brands is just not meaningful to consumers.

THE CONTENT STORY

84% OF CONSUMERS EXPECT BRANDS TO PROVIDE CONTENT.

Associated brand content includes: Social Experiences, Entertainment, Stories, Events & Solutions.



THE ROLE OF BRAND-PRODUCED CONTENT FALLS INTO SIX DIFFERENT CATEGORIES:

INSPIRE	EDUCATE	TO REWARD
INFORM	HELP	ENTERTAIN

Meaningful Brands® 2017 found that the most expected forms of content worldwide were those that entertained, rewarded and inspired.

Brands, on average are fulfilling customer expectations around content considered rewarding, but are missing out on huge amounts of opportunities to create more effective content that entertains and inspires.

Of course, content expectations differ from industry to industry.

Meaningful Brands® 2017 shows for example, that in travel and tourism people expect to be educated and inspired, before being informed. In the automotive sector however, people expect to be entertained and inspired, but then rely heavily on content that will help them to make the right purchase decision.

NEW FOR 2017

The Meaningful Brands® 2017 analysis also reveals new data that tracks the relationship between a brand's performance, its meaningfulness and the content it produces.

Our researchers analysed 1,500 global brands and 55 different content actions in order to test up to 60,000 combinations.

The results were broken down into three key areas:

Association

Is this content associated with my brand?

Performance

How is my brand executing this content?

Expectation

Would people like my brand to offer this specific content?



A Content Effectiveness Index was developed to monitor and record the strength of Association and Performance of the 10 most effective content actions.

The results show how content effectiveness varies by industry.

THE TOP 10 BEST PERFORMING INDUSTRIES ACCORDING TO THE NEW CONTENT EFFECTIVENESS INDEX ARE:



WE ARE HERE

SPOTLIGHT ON MEANINGFULNESS

MARRIOTT

New entry at number 14 in the 2017 **Meaningful Brands®** ranking

CHIEF EXECUTIVE: ARNE SORENSON

FOUNDED: 1927

BEST PRACTICE EXAMPLE OF MEANINGFUL CONTENT: THE INDIVIDUALISTS & BELLMEN

In May, 2015, Marriott's Autograph Collection Hotels teamed up with The Variety Studio: Actors on Actors, to create a video content series entitled The Individualists.

The idea was to tell every hotel's unique story by celebrating and collaborating with some of the world's best known storytellers from the worlds of film, television, art, photography, literature and design.

Featured conversations included Julianna Margulies and Clive Owen, Julia Louis-Dreyfus and Jeffrey Tambor, Queen Latifah and Taraji P. Henson, Liev Schreiber and Maggie Gyllenhaal, plus many more.

Variety.com ran 16 conversations from The Variety Studio: Actors on Actors, Presented by Autograph Collection Hotels from June 2015, and PBS SoCal stations televised two episodes.

In March, 2015, Marriott also produced a 17-minute action comedy called Two Bellman, created from its new content studio, which had been launched the previous autumn.

The movie tells the story of two bellmen, Gage and Christian, who work at the JW Marriott Los Angeles property. When the hotel hosts an event

featuring priceless works of art, the bellmen encounter a group of art thieves called the Purple Panthers, who try to steal a priceless painting.

The bellman go above and beyond the call of duty to stop the heist, and save the day.

The film received 5.1million views in just 11 months. A sequel, filmed at a Marriott property in Dubai got 7.9million views in just three weeks.

By focusing on telling great stories and providing entertaining content, Marriott understands that consumers today have outgrown the ploys of traditional 30-second spot advertising and want to engage with content that brings personal benefits to our every-day lives.

PAYPAL

Ranked 2nd in the 2017 **Meaningful Brands®** analysis (up 16 places from 2015)

CHIEF EXECUTIVE: DAN SCHULMAN

FOUNDED: 1998

BEST PRACTICE EXAMPLE OF MEANINGFUL CONTENT: #POLETOPOLE WITH STEVE BOOKER

London-based lifestyle blogger and YouTube host, Steve Booker accepted a challenge from PayPal to travel from the North Pole to the South Pole using only electronic payments and no cash.

Steve travelled across eight countries and three continents in just two weeks and used PayPal for all his travel, accommodation and adventures.

Starting in Norway, the trip took in dog-sledding under the Northern Lights in Svalbard, exploring the depths of Moscow's underground tunnels and flying over Table Mountain in a gyrocopter in Cape Town. The eight stop-offs also included Berlin, Paris, Barcelona, Buenos Aires and the world's most southerly city Ushuaia in Argentina. Using only PayPal merchants and PayPal retailers, Steve was able to bulk book activities, flights and accommodation. His adventures were documented to over 280,000 followers on Instagram and almost 200,000 YouTube subscribers.

By aligning Steve's inspiring photography, entertaining video content and influential storytelling to its brand values, PayPal successfully used social influence, plus earned and shared media to get across its brand message that you don't need cash for adventure. By connecting with real people and real events, PayPal could develop more meaningful connections.

Marriott's VP of global creative and content marketing, **David Beebe** told variety.com:

‘Our approach is that as brands, we need to stop interrupting what people are interested in, and become what they’re interested in.’



280,000
followers



200,000
subscribers

SIMPLE STEPS TO MEANINGFULNESS

The meaningfulness of brands is more important than ever. People want the content that brands produce to improve their personal and collective wellbeing.

Those brands that focus on making our lives easier, happier and healthier, gain a greater share of our existence and receive higher levels of engagement and trust in return. Currently there is a huge disconnect between people and brands. Being a trusted brand has not stemmed the disconnect. It's time to get Meaningful.

The data shows us:

1

Understand what matters to people and what they expect from your industry.

Personal Benefits: How brands tangibly improve people's lives. For example, healthy lifestyles, connectivity with friends and family, saving us time, showing us new skills, making our lives easier, fitness and happiness.

Collective Benefits: The role brands play in society. For example contributing to the economy, employment or improving the environment.

Functional Benefits: Brand developments in product and service such as quality, price, innovation and craftsmanship.

2

Understand the types of benefits that you currently deliver.

Do you support the community, offer real-time customer support, encourage active and healthy lifestyles or make our lives easier? Are there areas of Meaningfulness you do well and areas you could improve upon? Improvements in Meaningfulness equates to growth in trust and business performance.

3

Define the type of role you want to play in people's personal or collective wellbeing.

Should your brand be a guardian that protects people or a coach who motivates and encourages healthy life choices? Perhaps, your brand should be a teacher that educates and enlightens or a brand that listens, cares or connects people together.

4

Activate through an appropriate mix of touch-points, content and experiences.

Great content drives meaning, especially when it comes to personal benefits. With 84% of people expecting brands to provide content, there is a raft of opportunity for brands to better engage with audiences through social experiences, storytelling, entertainment, events or other content-led activations.

5

Measure and amplify.

Return on Meaning helps brands to track the potential returns on business performance (Share of Wallet & Stock Market) and marketing activity (KPIs) against incremental rises in Meaningfulness, as defined by personal wellbeing, collective wellbeing and functional benefits.

With every improvement in Meaningfulness, you will rebuild the broken relationship between brands and people and regain the loyalty, trust and respect of your audience.

LEARN

GLOSSARY OF RELATED TERMS & DEFINITIONS

ASSOCIATION:

Is this content associated with my brand?

BRAND TRUST:

A brand's ability to keep people engaged and to instil advocacy so that they keep coming back for more.

COLLECTIVE BENEFITS:

The role brands play in society. For example contributing to the economy, employment or improving the environment.

CONTENT EFFECTIVENESS:

Defined by crossing the strength of association of a brand to content types and the performance of that content.

CONTENT EFFECTIVENESS INDEX:

A metric developed to monitor and record the strength of Association and Performance of the 10 most effective content actions.

EXPECTATION:

Would people like my brand to offer this specific content?

FUNCTIONAL BENEFITS:

Brand developments in product and service such as quality and price.

GLOBAL BRAND

A brand assessed in at least three markets and two regions in the analysis and available worldwide.

KPIs:

Key Performance Indicators for marketers to measure success against.

MEANINGFUL BRAND:

A trusted brand that contributes to its industry as well as benefitting people's Personal and Collective wellbeing.

MEANINGFUL BRAND INDEX (MBI):

A complex metric used to view each brand's results in terms of consumer perception over time. The research deep-delves into all aspects of people's lives, including the role brands play in society, in our personal wellbeing and their impact on product performance. High MBI scores indicate high contributions to brand value rather than actual performance.

METRIC:

Measurement.

PERFORMANCE:

How is my brand executing this content?

PERSONAL BENEFITS:

How brands tangibly improve people's lives. For example, healthy lifestyles, connectivity with friends and family, making our lives easier, fitness and happiness.

ORGANIC MARKETING:

An alternative to the traditional 'paid first' approach to marketing whereby greater emphasis is placed on the strategic roles of owned, shared, earned and then paid media.

RETURN ON MEANING (ROM):

RoM helps brands to track the potential returns on business performance (Share of Wallet & Stock Market) and marketing activity (KPIs) against incremental rises in Meaningfulness, as defined by Personal Benefits, Collective Benefits and Functional Benefits.

SHARE OF WALLET:

A metric used to indicate a brand's financial performance within their sector.

STOCK MARKET PERFORMANCE:

As cited by Thomson One. Adjusted Price close, excluding dividends.



MEANINGFUL BRANDS SERVICES

MEANINGFUL BRANDS® AUDIT

Meaningful Brands® audit allows companies to assess in-depth how meaningful their brand is to people and how it's positioned versus its peers. It also paints a wider picture of key category and brand equity drivers and new brand territories that will generate stronger returns.

MEANINGFUL BRANDS® WORKSHOPS

Our exclusive workshops provide the opportunity to convert these data-driven insights into meaningful ideas and initiatives. We'll show you how to prioritise the type of content, experiences and solutions that will empower your business to become more meaningful, while exploring inspirational best-practice from the most meaningful brands.

MEANINGFUL BRANDS® CONTENT SERVICES

Our Meaningful Brands Content Services help companies to assess or redefine their content strategies. Services include:

- Content Category Reports
- Content Brand Audits
- Content Workshops

Havas Group has Content teams in each country that can help you plan and implement strategy.

‘Our Meaningful Brands® study has enabled us to help brands make more meaningful connections since 2008. We have proved time and again that improvements in meaningfulness equates to better business success and more in-depth audience insights. Our knowledge in this area can help deliver business results. Contact us for more details.’

Barbara Marx, Global Director
of Meaningful Insights, Havas
Media Group

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#MeaningfulBrands

Inspiring meaningful connections
between people and brands to fuel
business results.

Look for the **Meaningful Brands®**
section on some of our websites:

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Havasmedia.com
Havasmedia.co.uk