G L ;O B A L
B R A N D
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2 0 1 5

A study on how consumers rank leading brands, the role social media plays in their lives and why simplicity pays.

Siegel+Gale

Simple is smart.

WHAT'S THE KEY TO BUILDING A BETTER BRAND EXPERIENCE?

SIMPLICITY.

For the past six years, we've surveyed thousands of consumers worldwide to evaluate the simplicity of the world's leading brands. What do we mean by simple?

Easy to understand
Transparent and honest
Making customers feel valued
Innovative and fresh
Useful

While we learn new things each year, some things remain constant. The brands that rise to the top of the rankings are those that truly understand what their customers want—and make getting it simple. In addition, simplicity pays for brands that embrace it—garnering greater customer loyalty, fostering innovation among employees and ultimately increasing revenue *(pg. 3)*.

In a digital world, one channel for delivering simplicity is social media. This year, we took a deeper look at social and learned more about why consumers are using it as well as its implications for brands *(pg. 6)*.

But delivering truly simple brand experiences isn't easy. It requires leadership that knows how to stay focused on the customer, and be selective about what initiatives will make the deepest impact on them. We interviewed the leadership of six brands that consistently performed well in the Simplicity Index to learn more about how they build cultures of simplicity within their organizations *(pg. 12)*.

Today, consumers live in a world of limitless choices. Brand experience is the road to their loyalty. Simplicity will get you there faster.

SIMPLICITY BY THE NUMBERS

Since 2009, a stock portfolio comprised of the publicly traded simplest brands in our Global Top 10 has outperformed the major indexes.

Percentage of growth of index/portfolio since the beginning of 2009

+293%
Simplicity Portfolio

+105%
S&P

+102%
DAX

+78%
DOW

+33%
FTSE

350%
300%
250%
200%
150%
100%
50%
0%
-50%

2009   2010   2011   2012   2013   2014   2015
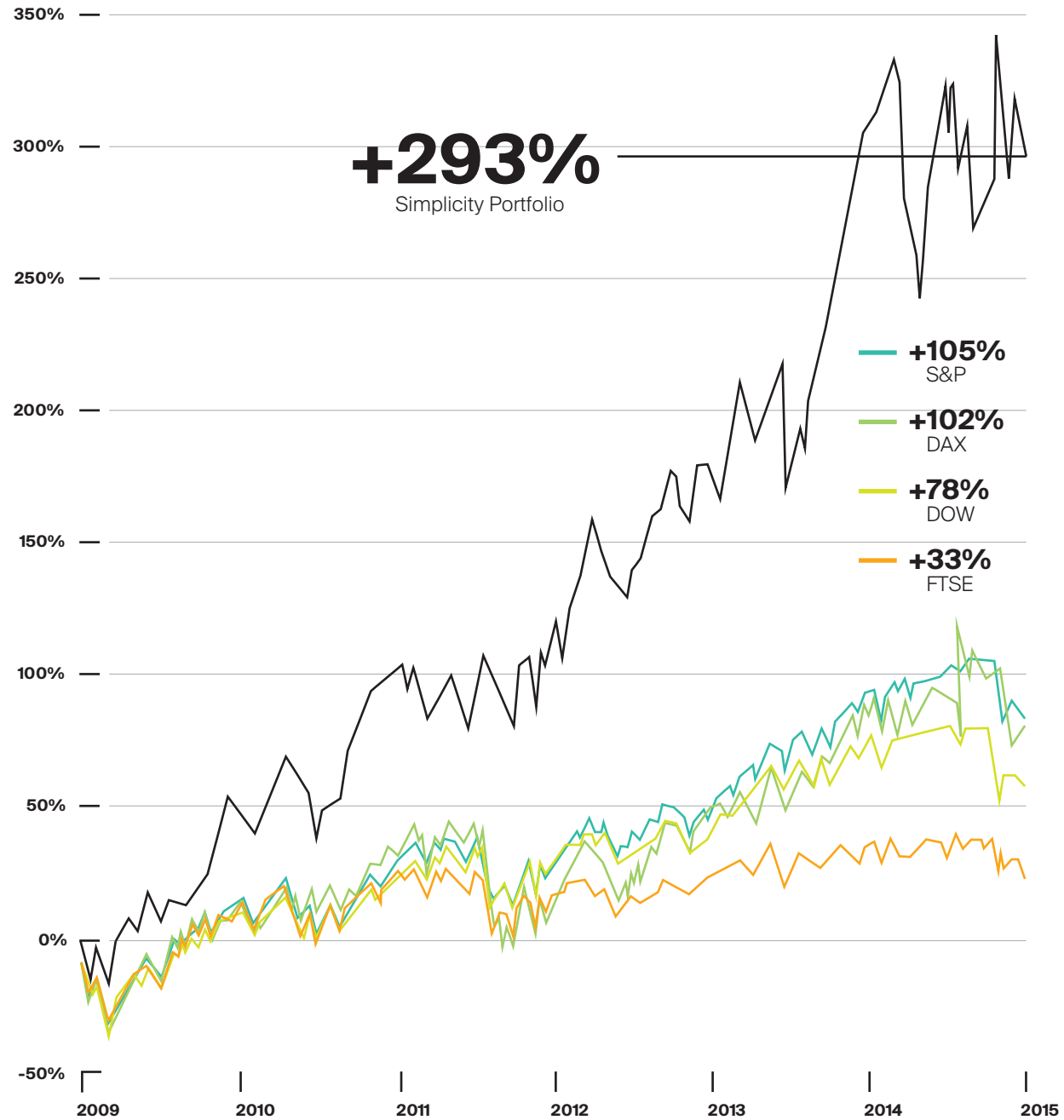
STOCK GROWTH

214%

How much a portfolio of the world's simplest brands has beaten the average global stock index since 2009

LOYALTY

69%

The percentage of consumers who are more likely to recommend a brand because it provides simpler experiences and communications

PREMIUM

63%

The percentage of consumers willing to pay more for simpler experiences

GLOBAL MOVERS AND SHAKERS

PERENNIALLY SIMPLE

Aldi, Google and Lidl stay securely in the top 3 spots this year, demonstrating a stalwart commitment to keeping things simple for customers.

CONSISTENTLY COMPLEX

Bupa and AXA remain in the bottom 10 again this year—for insurance companies, achieving simplicity certainly isn't easy.

FEATURED DISRUPTER

Dollar Shave Club takes the top spot on our US disrupters list. It appears that a high-quality product and hassle-free delivery give this brand a serious edge.

ABOUT FACE

Health and beauty product purveyor Sephora drops 29 spots in the Global Index. Maintaining simplicity can't be just skin-deep.

FEEDING FRENZY

Perennial high-performer McDonald's is joined by Burger King and KFC in this year's top 10, showing that quick service also means simple service.

TAKING OFF

British Airways elevates an impressive 22 spots in this year's Global Index to #46, while perennial low-flyer Ryanair remains in the bottom 10.

S I M P L Y
S O C I A L

If branding is the sum of a customer's experience with an organization, then every touchpoint and channel is an opportunity to deliver a powerful brand experience.

We examined how consumers use social media platforms to perform key tasks *(pg. 8)* and how simple it was for them to accomplish these tasks on each platform.

What are the takeaways for brands?

ENTERTAIN BEFORE YOU SELL

The primary reason consumers use social media is to find new sources of entertainment.

GET NOTICED, BUT DON'T DISRUPT

Ads that align to a particular social platform's purpose are least disruptive to consumers.

EXPLORE SOCIAL MEDIA FOR CUSTOMER SERVICE

Consumers find it effective though only a small percentage are using it.

WHY PEOPLE USE SOCIAL

Usage tracks simplicity—if people find a task simple to perform on social media, they are more likely to use social to perform that task.

━━━ This platform is simple   ━━━ I use this platform

Connecting with friends, family and coworkers
81.0%
52.6%

Finding sources of entertainment
77.0%
63.7%

Staying up to date on the news
73.7%
44.0%

Learning about brands, products and services
65.5%
31.1%

Engaging customer service
44.8%
11.8%
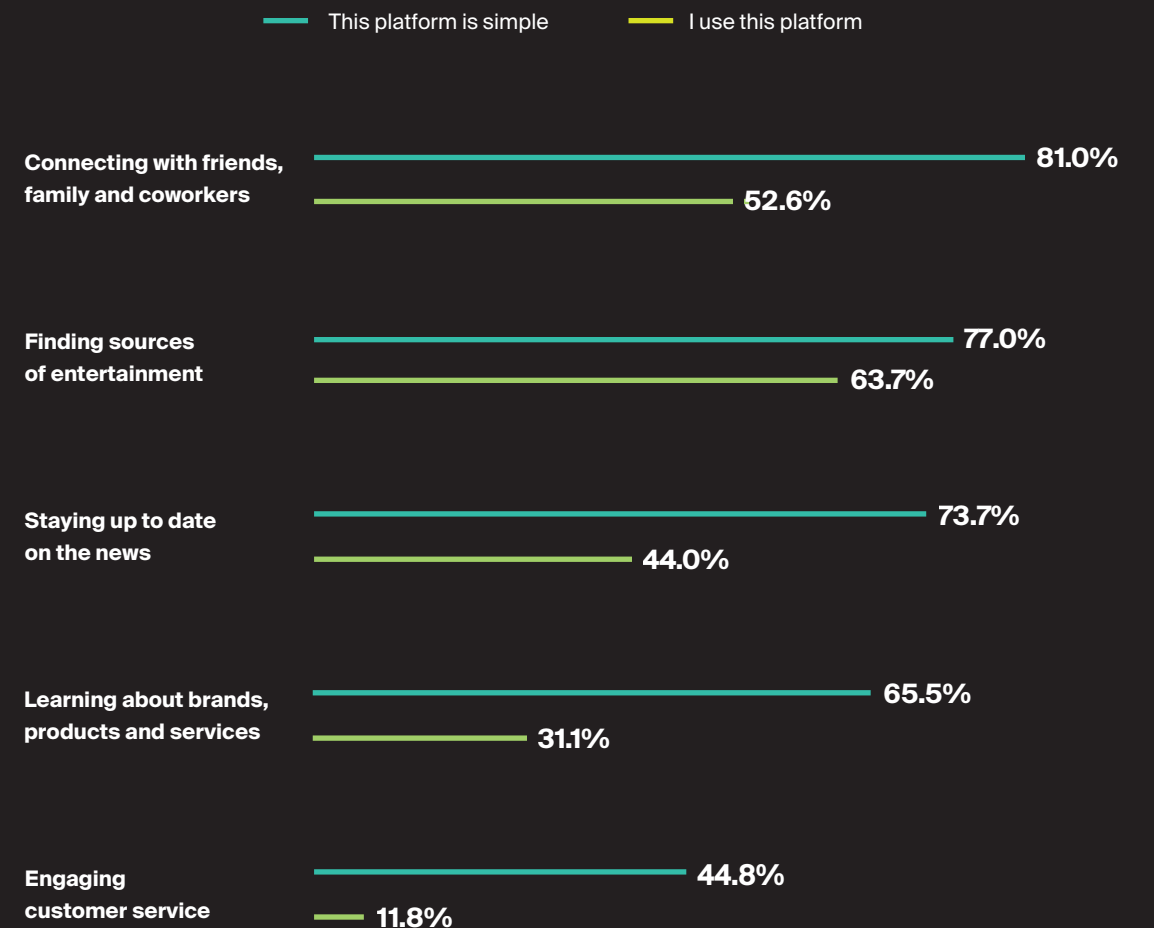
CONNECTING WITH FRIENDS, FAMILY AND CO-WORKERS

Younger people find accessing celebrities and getting updates
from brands much simpler than the older demographic.

What activities do people find simple?

— Younger than 45   — Older than 45

82%   83%
**Maintaining existing
relationships**

74%   61%
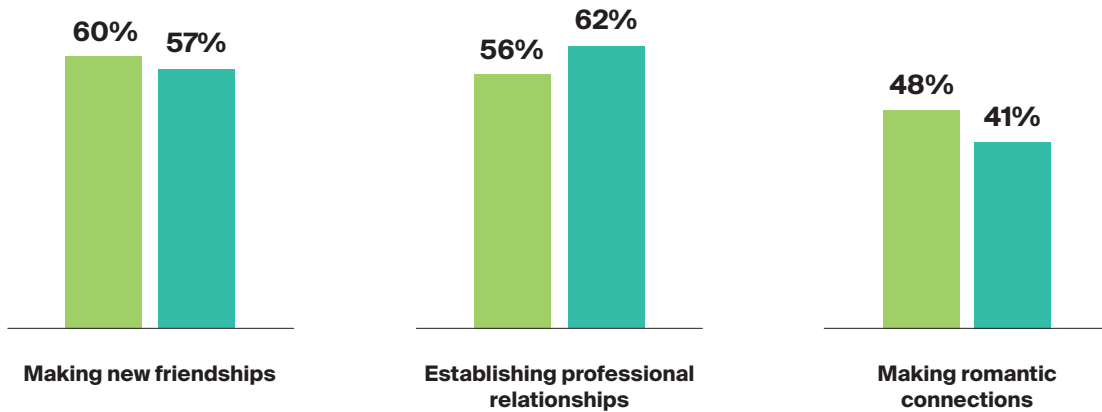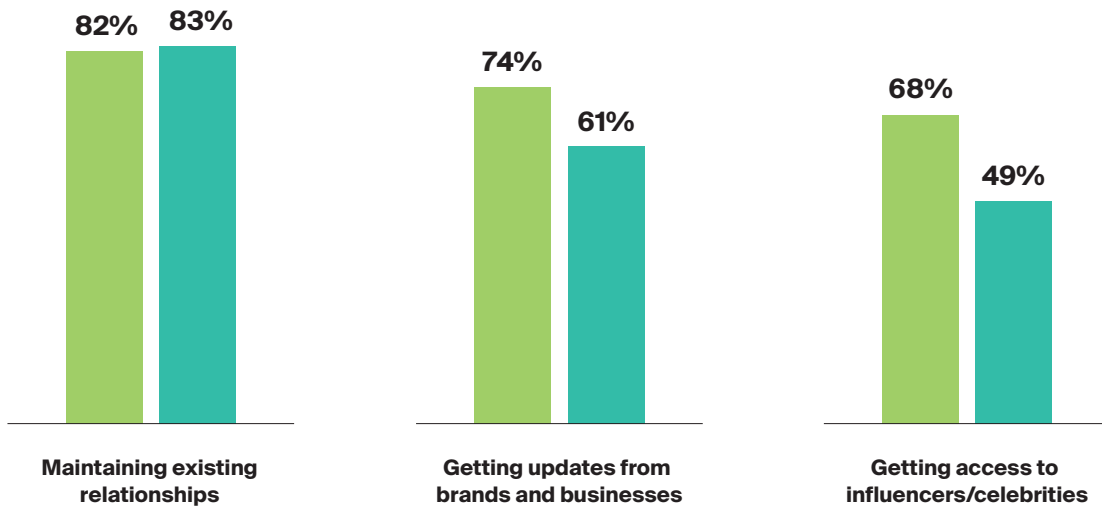**Getting updates from
brands and businesses**

68%   49%
**Getting access to
influencers/celebrities**

60%   57%
Making new friendships

56%   62%
**Establishing professional
relationships**

48%   41%
**Making romantic
connections**

LEARNING ABOUT BRANDS, PRODUCTS AND SERVICES

Facebook and Pinterest are most used for product discovery,
but Pinterest makes it simplest.

Which platforms do people use to discover new products, and are they simple?

— This platform makes discovery simple   — I use this platform for discovery

Pinterest · Yelp · Facebook · YouTube · Instagram · Twitter · Google+ · Tumblr · Linkedin · Snapchat
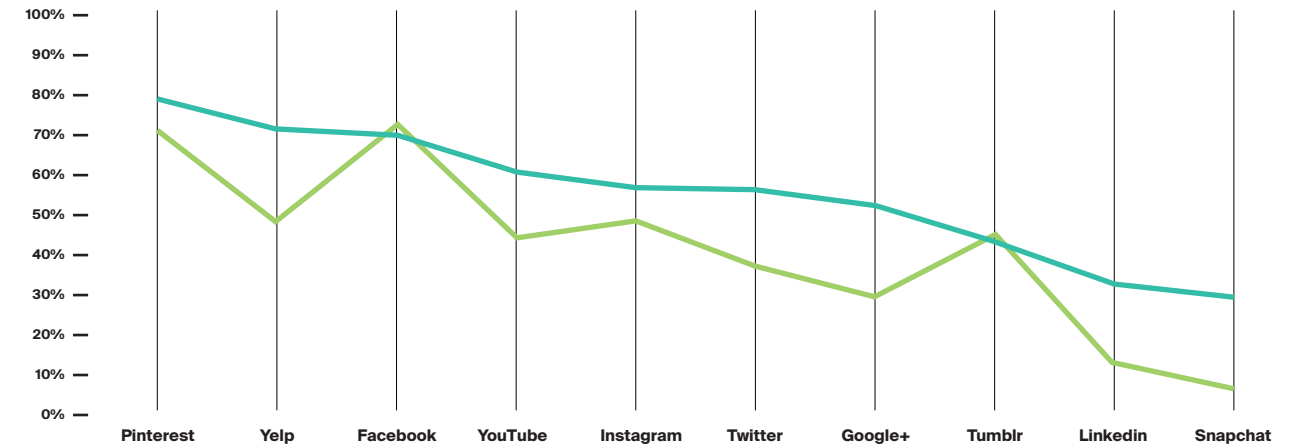
Brands struggle with developing ads that both get noticed
and are relevant to consumers.

How do ads affect people's experience on social?

— Ads disrupt my experience   — I find some ads interesting   — I don't notice ads

YouTube · Facebook · Twitter · Pinterest · Instagram · Yelp · Google+ · Snapchat · Tumblr · Linkedin
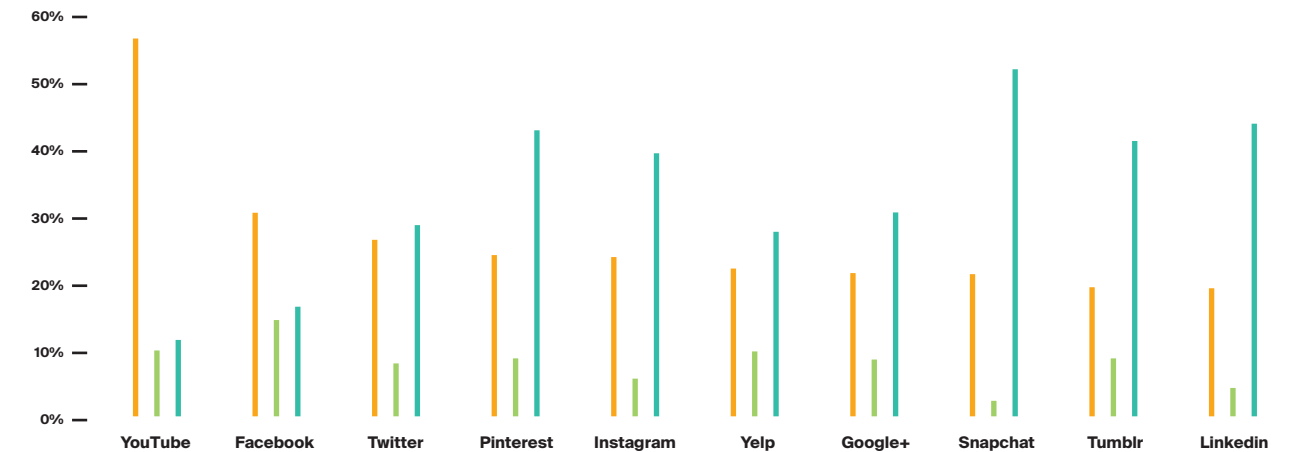
STAYING UP TO DATE ON THE NEWS

Twitter is the simplest platform for keeping up on current events, but respondents are more likely to follow a brand on Facebook, demonstrating that consumers make a distinction between news and brand updates.

How do people stay up to date on the news, and are those platforms simple?

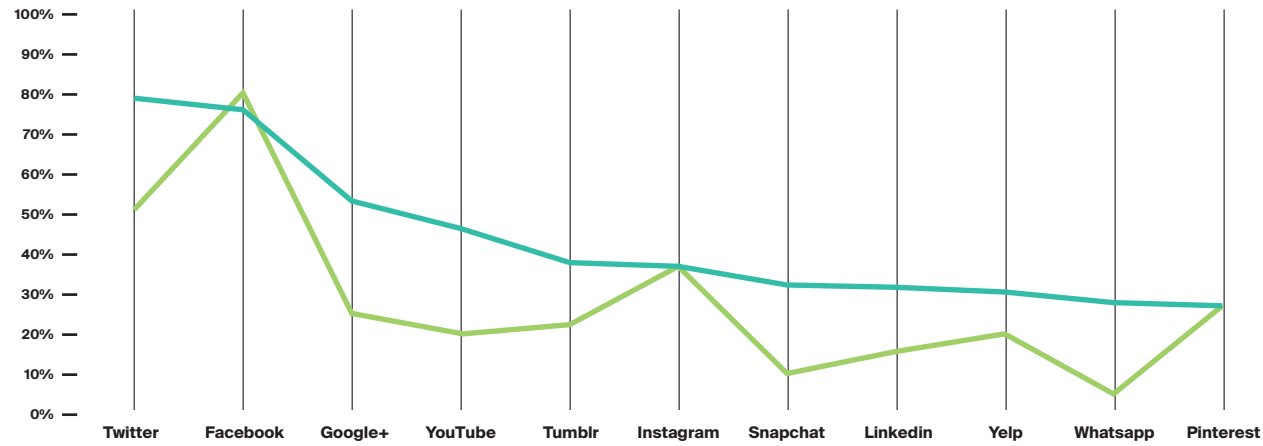—— This platform makes staying up to date simple   —— I follow brands on this platform

ENGAGING CUSTOMER SERVICE

Using social media for customer service is a very effective, but underutilized channel.

How many people use social for customer service and how many find it effective?

12%
Of respondents use social media to resolve customer service issues

86%
Of these respondents were able to resolve issues via their selected social media channel
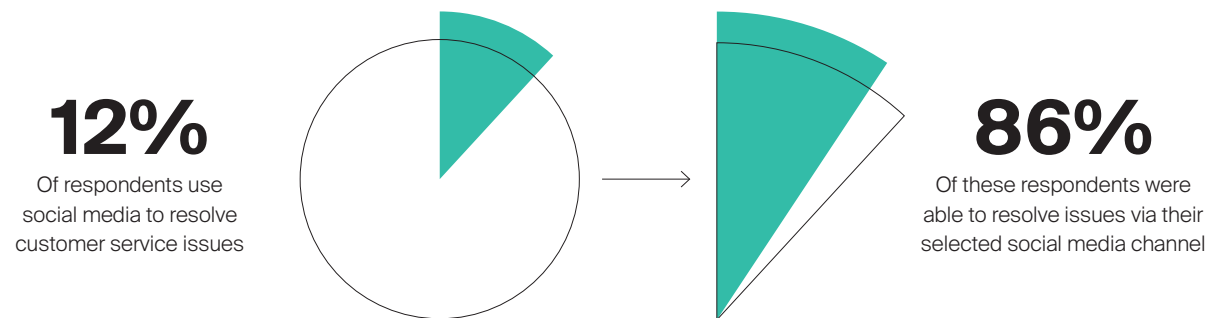
FINDING SOURCES OF ENTERTAINMENT

Although social media was made for connecting, people said that finding sources of entertainment is their primary reason for using it. However, the majority of respondents still only spend a fraction of their entertainment time on social media.

How much of people's "entertainment time" is spent on social media?

Less than
25%

67% of respondents spend less than 25% of their "entertainment time" on social channels
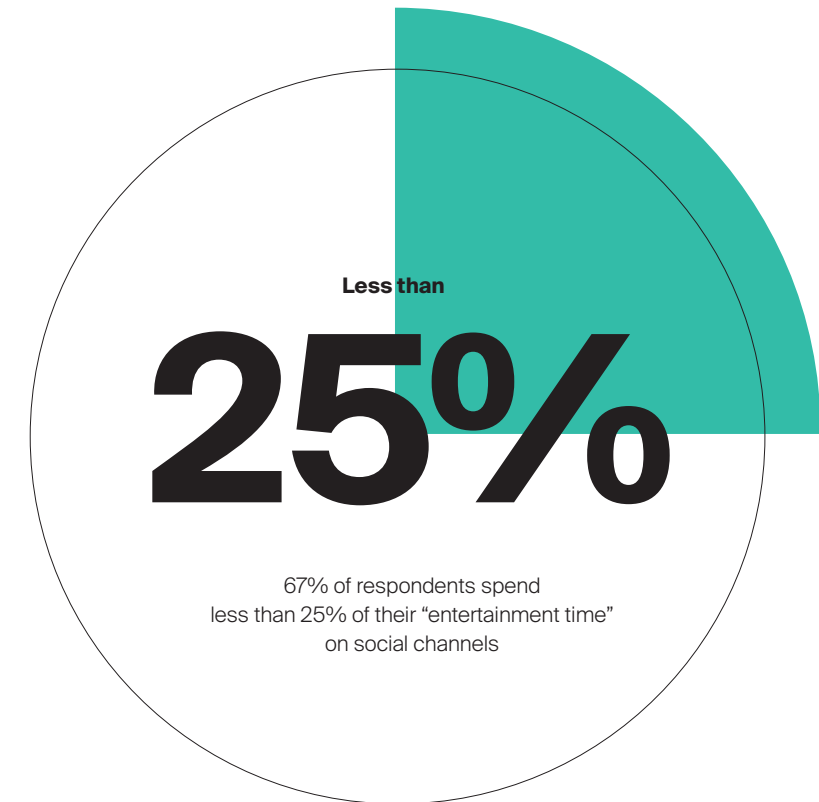
What are the primary reasons people use social as a form of entertainment?

Creates a shared experience with friends
51%

Provides a greater variety of sources
48%

Provides access to material on demand
46%
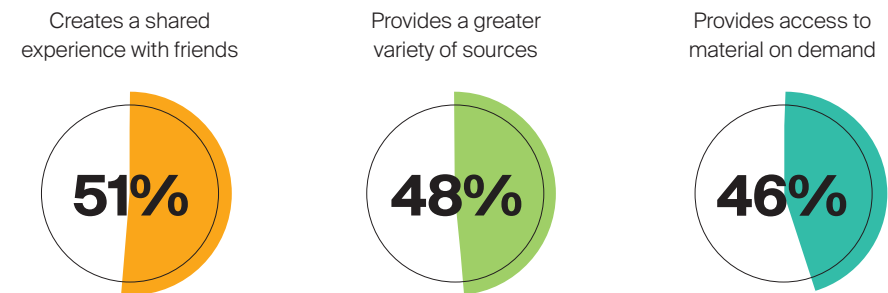
DELIVERING SIMPLICITY

Behind every brand delivering simpler experiences for customers is a leader who recognizes the inherent value in keeping things simple. As part of this year's Index, we interviewed marketing leaders and founders of brands that have performed well over the past few years, to understand why and how they simplify. Here is what these "simplifiers" have to say.

To learn more about what these simplifiers have to say, go to **simplicityindex.com.**

TONY HSIEH
CEO
ZAPPOS

NORMAN DE GREVE
CMO
CVS HEALTH

JOHN COSTELLO
CMO
DUNKIN' BRANDS

LORRAINE TWOHILL
CMO
GOOGLE

ANDY YOST
CMO
GANNETT

KEVIN KRONE
CMO
SOUTHWEST AIRLINES

TONY HSIEH

CEO ZAPPOS

What role does simplicity play in delivering on your brand promise?

One of my favorite quotes is "great brands are a story that never stops unfolding." I would say what we're most well known for is our service and customer experience. And that's a relatively simple message to get across initially. Our culture and community are things that people learn more about over time, as they get deeper into the experience.

How does Zappos strive to create simple experiences?

We really leave it up to customer loyalty representatives to do whatever they can do to wow the customer. It comes down to hiring people that live our 10 core values—making sure their personal values match our corporate ones. If we get the culture right, the brand building happens as a by-product.

What are the challenges in creating simple experiences for your customers?

As an example, trying to do something like a product exchange is not simple. And we address it in a counterintuitive way. We actually want customers to call us so we can deliver great customer service, experience, and in that process, hide the complexity from the customer. We want our customer service reps doing the heavy lifting. Unlike websites that want to hide their 1-800 numbers, we put ours on every page and look for ways to make it more prominent. Ultimately, we've found that customers that have contacted us via phone have a much higher lifetime value. A brand is a shortcut to a set of emotions.

Why do you think it is so difficult for most companies to deliver simplicity?

I think it goes against human nature. There's this struggle or tension between the simplicity of the story and being 100% precise in providing all the information. Most people aren't comfortable with not being 100% precise. I think it's critical to recognize what humans will and

won't remember. You can have a 20-page document full of 100% accurate legalese, but no one will remember it, compared to five words which capture the essence of the document.

What's the most recent, simple customer experience you've had?

There are two. In-n-Out burger due to the consistency of their product, and Postmates, which is very simple—if I want to order food in the middle of the night, it gets to me in an hour.

How do you strive to conquer complexity within Zappos?

As our brand evolved, we wanted to capture all the ways we thought about employees, customers and vendors. We began to have "inclusiveness creep." Our purpose statement a year-and-a-half ago became a mouthful, and although it was complete and precise, we decided to simplify it by going back to what we had before: To live and deliver WOW. It's much simpler to recall.

More generally, what organizational changes need to be made to build a culture of simplicity within a company?

One philosophy we've always had is to try not to make policies that address the 1% at the inconvenience of the 99%. It's important to trust employees, because it comes down to culture. It's hard for an unhappy employee to deliver great customer experiences. But cultural change is a long-term process.

How do you lead as a simplifier?

I try to just get out of the way. If people are passionate about something that will add value to our company, I encourage them to run with it. The long-term philosophy in driving self management is to simplify management.

NORMAN DE GREVE

CMO CVS HEALTH

What does your brand stand for, and how does it deliver on that promise every day?

Our purpose is to "help people on their path to better health." That's how the organization is built from enabling people to access our pharmacy, to coming into the MinuteClinic, to access to pharmacy benefits. Our brand personality is "leading with heart." We set high expectations for ourselves, and we achieve them with heart.

What role does simplicity play in delivering on that promise?

A big one. We're a Fortune 10 company with multiple lines of business. These businesses were operating independently previously, but the creation of CVS Health got us all to work together with one purpose. It's a great example of how brand strategy drove simplicity.

How does your organization strive to create simple experiences?

I think a good example is the digital lab that we built. We have an entire group in the organization that looks at the future of digital and healthcare and how it will enable simpler experiences for customers. Healthcare can be confusing and fragmented, and we are building partnerships with multiple tele-health providers to determine how to make it simpler for customers. You should be able to talk to healthcare providers through apps, use them to help diagnose yourself or a family member, etc. That's what we're working toward.

What are the challenges creating simple experiences for customers?

If you don't have clarity of purpose and you don't have clear your brand differentiators, then you have people who are trying to create simplicity, but who are moving in different directions. That doesn't feel simple to the customer. The purpose needs to guide every decision people in your company make.

What do c-level execs need to do to operationalize simplicity?

Focus on how you are making things better for your customer. The center of gravity in big companies is often inside the company, and not outside it. It's interesting that for a small company, the center of gravity is usually the customer.

How do you lead as a simplifier?

You have to be a reductionist, and believe in answers-first communication. That is, lead with the answers before giving the reason you came to that answer. Talking about the hypothesis first, and then why you believe in it gets you to a consensus faster—too much preamble gets confusing and can send you on a tangent.

What's the most recent, simple customer experience you've had?

Interface design is a major value driver—it's hard to deliver a simple and effective design. Those products that are dominating in our culture today are those that use simplicity in design. UBER is a brand I know and love. What's fascinating is that they have no cars—and they've created $50 billion in market value.

What does "simplicity" mean to you?

Three things—something that is easy to understand, easy for customers to use and easy for lines of business to adopt and replicate.

JOHN COSTELLO

CMO
DUNKIN' BRANDS

What role does simplicity play in delivering on your brand promise?

I'm a big believer in simplicity. One of the keys to brand marketing success is to build a strong differentiation for your brand, and I define brand differentiation as providing the answer to the question, "why should customers choose your brand over all others?" In my career, I've found successful brands have a simple premise and that the strongest brand differentiation can be summarized in a simple but relevant context.

What are the challenges creating simple experiences for customers?

One could argue about the complexity of serving fresh food and beverages. Each cup of coffee and sandwich is prepared fresh for every customer. Food service is a complicated business, particularly when you try to apply speed, value and simplicity into the experience. We also introduced 40 new Dunkin' Donuts products in the U.S. last year. When you stop for breakfast at a Dunkin' Donuts, you can get coffee, a sandwich or a donut quickly. Simplicity and speed of customer experience is important, along with cost and convenience.

How do you strive to keep things "simple" for your marketing team every day?

We focus on fewer, bigger things. Find out what makes a difference, and eliminate the little things that create clutter. We get people to focus on the three to five things in their area that make a difference.

What is the top piece of advice you'd give to other brands trying to simplify?

First, develop a simple, compelling point of brand differentiation. I'm a big believer that you can separate winners and losers by how simple that is. Second, focus on fewer bigger things. Have the discipline to say "no" to the clutter. Third, build a very strong team that buys into brand differentiation and simplicity. Fourth, as a leader, walk the talk. As leaders, we need to not only set a focused direction, but to make sure we can help our teams focus on the most important things, and clear the non-important things off their plates. Also don't busy team members with projects that don't meet the priorities.

WARBY PARKER
eyewear

What's the most recent, simple customer experience you've had?

I purchased new glasses from Warby Parker, and it was a fantastic experience. My first experience was with their website, which was highly curated and had a good selection of current styles. I then went into a store where sales associates were terrific, and was followed by a store manager and optician who helped me pick the right frame and prescription. Ten days later I got the glasses in the mail. The combination of a curated selection, great customer service, tech support and great value was compelling. I tweeted at them that I had a great experience, and three hours later, they responded by thanking me. It was a very positive, omni-channel experience.

LORRAINE TWOHILL

CMO
GOOGLE

What does your brand stand for, and how does it deliver on that promise every day?

The brand is "knowledge" in one word—access to information. We deliver on this promise through search. We think a lot about curiosity, which is a big part of our culture and company. When people are curious about something, we give them information on it quickly through search.

What role does simplicity play in delivering on that promise?

People are generally fearful of tech—it can be very complex. We have to overtly think about simplicity every step of the way. When you open one of our apps, for example, we'll walk you through the key features in a simple way the first time you use it. We think a lot about how we reduce friction and reduce pain for users. All the complexity can be behind the scenes, but the user experience should be simple. We need to get people what they're looking for, fast, and simplicity is a core part of our promise.

Can you give an example of how your organization strives to create simple experiences?

I think engineers tend to build complex things—feature overload is a common problem because they have lots of ideas. An example I'll give is the new Google Photos app. At Google, we worked extremely hard to simplify it and create a clear and compelling app that makes all photos searchable. We had to resist the temptation to overload the product. Chromecast is another example on the hardware side. Just plug it in and go. That was part of the brief—simplicity had to be part of the plan from the very beginning.

What benefits has your company experienced from simplifying?

Faster and greater adoption. We've seen it time and time again—if you eliminate friction you get better adoption, and better word of mouth. The product gets used by more people.

What are the key indicators that simplicity is driving your business?

You have to look at things like satisfaction. We hold ourselves to a high bar: can people live without us? User satisfaction and happiness, at a fundamental level, is a really important measure of whether you got it right. The end goal is a happy customer.

How do you lead as a simplifier?

I think it's extremely important as a leader to keep a short list of things that really matter, and be sure people know what those things are. You also have to find ways to clear the friction and eliminate pain. We have meetings called "bureaucracy busters" where we find ways to eliminate barriers.

THE MARKER
HOTEL BAR BRASSERIE

What is the most recent, simple customer experience you've had?

I also think hotels have gotten a lot better. The Marker hotel in Dublin, for example. The, wifi was free and you didn't have to log in to get on it. That's key. I'd stay there again for that reason.

What does "simplicity" mean to you?

Peace. I think life has gotten very complex. There's an awful lot going on—be at peace with realizing you're human and can't do it all.

ANDY YOST

CMO
GANNETT

What does your brand stand for, and how does it deliver on that promise every day?

USA Today is in the business of informing consumers on a wide variety of topics that impact their everyday lives. Consumers rely on us for trusted, up-to-the-minute news on topics from politics to sports, entertainment and breaking news. People look to us to learn a lot in a short amount of time, while enjoying themselves in the process. That's the heritage of the print product, which now has translated nicely to digital properties as well. So we're in the business of telling stories that allow people to better understand the world they're part of, in a way that's easy to understand.

What role does simplicity play in delivering on that promise?

From the standpoint of USA Today, simplicity is really crucial to the design of our product and allows us to have a direct impact on consumer engagement with our brands. We connect our audiences to the things that matter most to them, across all the platforms that are most relevant. People don't have the time anymore to digest and analyze lots of information, so it's our responsibility to take that content and design it in a way that the news and information is streamlined and consumed in the way customers want to consume it.

How does your organization strive to create simple experiences?

In our sports category, we have a product called "For the Win." It's our first mainstream media property focused on social news, with a stream of stories fans either are, or will be, talking about in the moment. What's great about this is the content is designed specifically to resonate on social platforms, where the audience is, specifically mobile. It's the intersection of the great sports content you expect from us, delivered in the voice and on the platforms that matter to customers.

What is the top piece of advice you'd give to other brands trying to simplify?

Play to your strengths. Know what your brand stands for and don't deviate from that. We continue to do that here at USA Today. Even as we move from our traditional newspaper platform to digital experiences, the history we've developed in the print world translates to digital.

What's the most recent, simple customer experience you've had?

I drive Audis. What I like about my Audi experience is that not only is the car designed simply, pretty much everything in the car is intuitive. Audi's product design is simple, and so is their customer experience. I have no issues when I have to take my car in for maintenance—it's a seamless in-and-out customer experience. And the costs and charges are clear—there are no hidden or surprising costs.

How do you lead as a simplifier?

Setting clear goals, communicating frequently and in an empowering way. I try to empower everyone on my team to be part of the solution. I can't do this job alone, nor can my leadership team. We need the best ideas, and we need highly engaged employees to develop them. Through empowering folks to make decisions, we can create better, simpler experiences.

KEVIN KRONE

CMO
SOUTHWEST AIRLINES

What does your brand stand for, and how does it deliver on that promise every day?

We put people first. That means two sets of people: our employees and our customers. Ultimately, if that relationship is successful, our shareholders win as well. We empower employees to make decisions. We let them use their judgment and act on situations where they can improve customer experience. That gives them satisfaction and the desire to deliver better service. In addition, our no bag fee policy is a great example of treating customers how we would want to be treated.

What role does simplicity play in delivering on that promise?

It's critical to us for a couple of reasons. If you add complexity in terms of rules and regulations for employees, it makes them less productive and friendly—and that impacts the customer experience. As an operator, we want to be as simple as possible. Complexity adds cost, which affects our ability to operate.

What are the challenges creating simple experiences for customers?

People are always trying to find ways to do new things creatively. As you get pulled into doing that, it's easy to think of solutions that ultimately can add more clutter or complexity. It's important to stay focused.

How do you strive to conquer complexity within your own company?

We try to look at things through our customers' eyes. The customer doesn't have that intimate knowledge about our business, so when we're adjusting an existing policy, we put ourselves in the customers' shoes and try to understand how it will be perceived by them.

What benefits has your company experienced from simplifying?

It has allowed us to operate a complex business with extreme precision and reliability. That helps the company be more efficient with our assets, and do what we say we will.

Why do you think it is so difficult for the majority of companies to deliver simple experiences?

People get so close to their own work, it's hard to look out and with a fresh set of eyes. People also fail to just think of the customer. We regularly talk to small groups of customers, not as a focus group, but just to hear what they think of the experience and listen to them, and that helps guide us.

How do you lead as a simplifier?

The job of any leader is to look for opportunities to simplify what's happening in the department. Lots of times I have to say no to great ideas that might bog the team and distract us from our task. It's prioritization and making tough calls. It's easy to be complex, and hard to be simple.
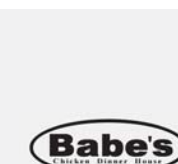
What's the most recent, simple customer experience you've had?

There's a restaurant here in Dallas called Babe's that serves only fried chicken and chicken fried steak. It's a very limited menu, but popular because they do those two things really well.

What does "simplicity" mean to you?

It means that things are straightforward and transparent, and that the customer is treated how he or she wants to be treated.

GL:OBAL

	BRAND	INDUSTRY	RANK CHG*
1	Aldi	Retail/Grocery	N/C
2	Google	Internet search	N/C
3	Lidl	Retail/Grocery	N/C
4	Netflix	Media	↑1
5	McDonald's	Restaurants	↓1
6	Burger King	Restaurants	↑8
7	IKEA	Retail/General	↓1
8	YouTube	Social media	↑11
9	eBay	Internet retail	↑12
10	KFC	Restaurants	↑3
11	Samsung	Electronics	N/C
12	Yahoo!	Internet search	↑3
13	Walmart	Retail/General	↑28
14	LG	Electronics	↑4
15	Amazon	Internet retail	↓5
16	Sony	Electronics	↑4
17	Ford	Automotive	↑23
18	Levi's	Retail/Fashion	N/A
19	Groupon	Internet retail	↑26
20	Philips	Electronics	↑6
21	Carrefour	Retail/Grocery	↓5
22	Nokia	Electronics	↓10
23	Canon	Electronics	↑9
24	Pizza Hut	Restaurants	↓7
25	HP	Electronics	N/C
26	Dell	Electronics	↓3
27	Panasonic	Electronics	↑6
28	Miele	Appliances	↓19
29	H&M	Retail/Fashion	↓1
30	Expedia	Travel/Booking	↑20
31	Apple	Electronics	↓9
32	ZARA	Retail/Fashion	↑4

	BRAND	INDUSTRY	RANK CHG
33	Lenovo	Electronics	↑11
34	Bing	Internet search	↓4
35	Microsoft	Electronics	↑3
36	Adidas	Fitness	↓1
37	Nike	Fitness	↓3
38	Holiday Inn	Travel/Hotels	↑25
39	Marks & Spencer	Retail/General	↑27
40	Starbucks	Restaurants	↑3
41	Bosch	Appliances	↓17
42	Volkswagen	Automotive	↑12
43	Best Western	Travel/Hotels	↓16
44	Mercedes-Benz	Automotive	↑3
45	Marriott	Travel/Hotels	↑19
46	British Airways	Travel/Air	↑22
47	Comfort Hotels	Travel/Hotels	N/A
48	Skype	Telecom/Cell phone	↓9
49	Toyota	Automotive	↑3
50	Reebok	Fitness	↑9
51	Virgin Mobile	Telecom/Cell phone	↑26
52	Gap	Retail/Fashion	↓11
53	easyJet	Travel/Air	N/A
54	Instagram	Social media	↓1
55	Sky	Telecom/Cable	↓9
56	HTC	Electronics	↓19
57	Boots	Retail/Health and beauty	↑5
58	Haier	Appliances	↓29
59	Lufthansa	Travel/Air	↓11
60	Sephora	Retail/Health and beauty	↓29
61	FedEx	Shipping/Mail	↓5
62	Hilton	Travel/Hotels	↓11
63	Facebook	Social media	↓6
64	Debenhams	Retail/General	↑9

	BRAND	INDUSTRY	RANK CHG
65	BMW	Automotive	↑6
66	Audi	Automotive	↑12
67	iTunes	Internet retail	↓2
68	O2	Telecom/Cell phone	↑1
69	Siemens	Appliances	↓20
70	DHL	Shipping/Mail	↑2
71	Puma	Fitness	↓10
72	Pinterest	Social media	↓5
73	Vodafone	Telecom/Cell phone	↓13
74	UPS	Shipping/Mail	N/C
75	Google+	Social media	↑5
76	Twitter	Social media	↓6
77	Budget	Travel/Car rental	↑5
78	LinkedIn	Social media	↑6
79	Topshop	Retail/Fashion	↓24
80	HSBC	Banks/Retail	↑1
81	Hertz	Travel/Car rental	↑2
82	Citibank	Banks/Retail	↑5
83	Avis	Travel/Car rental	↑3
84	Peugeot	Automotive	↓9
85	Ryanair	Travel/Air	↑4
86	Bupa	Health insurance	↑2
87	AXA	General insurance	↑3

*Change from previous year; N/A: Not applicable; N/C: No change
For methodology, see page 76–79.

1

ALDI

Discount supermarket chain Aldi once again takes the top spot in the Global Brand Simplicity Index. Its formula for success? Uncomplicated offers, low prices, high-quality products and great customer service. And thanks to Aldi's transparent price comparisons, consumers know the brand is giving them the best deal.

2

Google

"Perfect functionality" summarizes the chorus of praise for Google's sleek interface and its ability to cut through nearly infinite amounts of information. New parent company Alphabet further demonstrates Google's commitment to clarifying the role and relationship of each of its unique services. Simplicity can scale.

3

LIDL

The limited range of products, identical store layouts and clear, frequent communications is what makes shopping at this discount supermarket so simple. "Its brand ethos is simplicity in retailing… its methods of advertising and communicating with customers are generally quite direct and straightforward," says one respondent.

4

NETFLIX

Not only does streaming video service Netflix make it simple to watch movies and shows from practically anywhere with an internet connection, it has transformed how entertainment is consumed, adding "binge watching" to our lexicon. Garnering 34 Emmy nominations in 2015, this brand demonstrates that simple and high quality can go hand in hand.

5

McDonald's

This fast food chain's convenience, reliability and simplicity are recognized by consumers the world over. In May, McDonald's streamlined the ordering process and made service more efficient with simpler drive-thru menus and offerings. With this commitment to simplicity, it's easy to see why customers keep "lovin' it."

6

BURGER KING

Clear communications are at the heart of why consumers find Burger King simple. The quick service restaurant gets especially high marks for its easy-to-read menu and straightforward prices. Burger King's smartphone app, which puts coupons at the customer's fingertips, was also lauded for its simplicity.

7

IKEA

Swedish furniture maker IKEA wins points for simple designs and intuitive catalogues. "Large text, clear images and seeing products in context make it easier to shop," says one respondent. IKEA continues to innovate and simplify, introducing new products this year that offer more customization and easy assembly.

8

YouTube

Consumers gave YouTube rave reviews for its ability to return search results quickly, and its easy-to-navigate interface. The site will be launching a subscription service later this year, which will allow users to bypass advertisements and get straight to the content they want, making video streaming even more seamless.

9

ebay

There's a lot to love about e-commerce platform eBay, according to survey respondents. Product categories are clear, it's easy to sell items and it's easy to get in touch with company representatives or other sellers. The ability to locate obscure and one-of-a-kind finds without hassle also remains a draw for consumers.

10

KFC

The 3rd restaurant in our Global Top 10 this year garners praise for its brief and consistent menu, and lightning-fast order fulfillment. "They have sold the same items for a long time and they know what they're all about," says one survey respondent. For KFC, familiarity appears to breed loyalty instead of contempt.

78
Linked in.

For social network LinkedIn, the confusion begins with its purpose. "I don't understand how to use it," says one respondent, echoing the sentiment of many others. LinkedIn has recently faced lawsuits due to data breaches and privacy concerns, specifically around inaccurate user data. Sometimes, social isn't so simple.

79
TOPSHOP

Though the name suggests a premium experience, this clothing retailer is in our Global Bottom 10 due to its overwhelming in-store selection. Respondents also indicate that Topshop's online experience isn't any simpler. "I've never used the website without it crashing, and the layout is confusing," says one.

80
HSBC

This global bank receives similar complaints to its peers: confusing products, policies and security measures. "Security is important," explains a respondent, "but HSBC's secure key is hard to use." Customers also notice a light marketing presence in some regions. "Out of sight, out of mind!" quips one of them.

81
Hertz

Car rental company Hertz lands in the Bottom 10 this year due to what respondents perceive as confusing terms and conditions and unclear costs. Others noted difficulty getting clear quotes on the company's website and a lengthy registration process.

82
citi

Survey respondents indicated that they found this retail bank's commercials and statements confusing. In addition, lengthy disclaimers, legalese and wordy emails appear to be barriers to a simple experience for respondents this year.

83
AVIS®

"Hidden extras" might sound like a good thing, except when it comes to fees. Sneaky extra charges plague this car rental company's customers, who are also baffled by the difficulty of comparing offers and getting a quote online. Non-native English speakers also complain that the website doesn't offer other language choices.

84
PEUGEOT

Cars that break down easily are a pain, but cars that require consumers to jump through hoops to repair them become an even greater tax on time, energy and money. According to survey respondents, Peugeot sits at the nexus of these issues, with many people bemoaning shoddy workmanship, and inaccessible service and customer care.

85
RYANAIR

Budget airline Ryanair has a reputation for dirt-cheap travel, but respondents warn against the "attractive" price tags. Hidden fees range from baggage to payment options. Recently, Ryanair has made efforts to step up their customer service, resulting in an uptick of bookings. We'll see if this allows them to ascend in the rankings next year.

86
Bupa

When it comes to personal health, transparency and honesty are key to building trust. And this is where Bupa fails to deliver: "They do not give clear pricing structures for the services they offer," a respondent writes. With hidden charges and hidden restrictions, simplicity appears hard to come by.

87
AXA

This global insurance company lands in the bottom spot again this year. Survey respondents are frustrated by AXA's lack of clarity in everything from pricing to digital experiences. "Explanations are garbled and hard to understand," writes one, adding "their website isn't user-friendly."

INDUSTRIES DON'T STACK UP EVENLY ACROSS MARKETS

Perceptions of industry performance differ by region. Here is a country-by-country industry against the global industry ranking.

Legend: 701+ | 700–601 | 600–501 | 500–401 | < 400

#	Industry	Score	US	UK	GE	SW	ME	IN	CN
1	Internet search	950							
2	Electronics	768							
3	Retail/Grocery	741							
4	Internet retail	737							
5	Appliances	727							
6	Restaurants	707							
7	Retail/General	672							
8	Media	645							
9	Retail/Fashion	612							
10	Travel/Hotels	611							
11	Shipping/Mail	606							
12	Travel/Booking	580							
13	Retail/Health and beauty	568							
14	Banks/Retail	552							
15	Travel/Air	551							
16	Telecom/Cell phone	543							
17	Social media	540							
18	Automotive	539							
19	Utilities	511							
20	Travel/Train	491							
21	Fitness	480							
22	Telecom/Cable	458							
23	Travel/Car rental	424							
24	Health insurance	331							
25	General insurance	272							

SIMPLICITY PREMIUM

All brands can benefit from simplifying, but not all may benefit equally. To understand who has the most to gain, we compared brands based on two metrics: Simplicity Score and Simplicity Premium. We then divided them into four categories based on their potential.

HIGH SCORE/LOW PREMIUM

Seen as simple, these brands won't be awarded a higher premium for simplifying further. They need to focus on showing the value of the simplicity they already offer, and fresh ways of providing simple experiences so that consumers will pay more for them.

HIGH SCORE/HIGH PREMIUM

Perceived as simple with a high premium, these brands will be awarded an even higher premium if they keep simplifying. They need to continue to realize the value of the simple experiences they are providing.

LOW SCORE/LOW PREMIUM

Considered complex with a low premium, these brands are so complicated consumers can't imagine that these companies could simplify to a degree that's worth paying more for. These brands need to simplify the experiences they provide before people will conceive of paying more.

LOW SCORE/HIGH PREMIUM

These brands are not seen as simple, but consumers would pay a higher premium if they were. They need to simplify their brand experiences, and they'll be able to reap significant rewards if they do.

Being confined to an industry with a low premium doesn't mean that individual brands can't break free. It all comes down to their dedication to delivering simple experiences and communicating them in ways that inspire consumers. This chart shows the position of the Top 10 global brands that have the highest premium in each group.

Simplicity Score
How simple a brand is perceived to be

HIGH SCORE/ LOW PREMIUM

H&M	KFC
LG	Miele
Microsoft	HP
Canon	Expedia
Nokia	Amazon

HIGH SCORE/ HIGH PREMIUM

Netflix	Dell
Apple	Samsung
Nike	ZARA
Sony	Ford
IKEA	Adidas

LOW SCORE/ LOW PREMIUM

Reebok	iTunes
Gap	Starbucks
Bosch	Marks & Spencer
Holiday Inn	FedEx
Haier	Debenhams

LOW SCORE/ HIGH PREMIUM

Toyota	BMW
Audi	Virgin Mobile
Mercedes-Benz	HTC
Puma	Lufthansa
	Avis
	Marriott

Simplicity Premium
How much more people are willing to pay for simpler experiences in the future

UNITE :D STATES

	BRAND	INDUSTRY	RANK CHG*
1	Google	Internet search	↑11
2	Netflix	Media	↑3
3	Publix	Retail/Grocery	↑20
4	Amazon	Internet retail	↓2
5	Chipotle	Restaurants	↑4
6	Zappos.com	Internet retail	↓5
7	Dunkin' Donuts	Restaurants	↑3
8	Burger King	Restaurants	↑5
9	KFC	Restaurants	↑13
10	Pizza Hut	Restaurants	↓6
11	Old Navy	Retail/Fashion	↑19
12	Groupon	Internet retail	↑46
13	Starbucks	Restaurants	↑2
14	McDonald's	Restaurants	↓6
15	Maytag	Appliances	↑50
16	Samsung	Electronics	↑17
17	KAYAK	Travel/Booking	↑1
18	Apple	Electronics	↑3
19	Trader Joe's	Retail/Grocery	↓13
20	Kroger	Retail/Grocery	↓13
21	UPS	Shipping/Mail	↓5
22	YouTube	Social media	↑16
23	Honda	Automotive	↓12
24	Ford	Automotive	↑28
25	Sony	Electronics	↑28
26	Nike	Fitness	↑9
27	Target	Retail/General	↓1
28	Whole Foods Market	Retail/Grocery	↑13
29	Walmart	Retail/General	↑22
30	Levi's	Retail/Fashion	N/A
31	Yahoo!	Internet search	↓7
32	HP	Electronics	↑46

	BRAND	INDUSTRY	RANK CHG
33	Holiday Inn	Travel/Hotels	↑17
34	Southwest Airlines	Travel/Air	↓20
35	CVS/pharmacy	Retail/Health and beauty	↑2
36	Dodge	Automotive	↑28
37	Safeway	Retail/Grocery	↓20
38	H&M	Retail/Fashion	↑22
39	Reebok	Fitness	↑34
40	FedEx	Shipping/Mail	↓11
41	Victoria's Secret	Retail/Fashion	↓14
42	Craigslist	Internet retail	↓23
43	Walgreens	Retail/Health and beauty	↓4
44	Sephora	Retail/Health and beauty	↓13
45	Progressive	General insurance	↑14
46	Bing	Internet search	↓21
47	Panasonic	Electronics	↑20
48	eBay	Internet retail	↓5
49	Instagram	Social media	↓2
50	Pinterest	Social media	↓16
51	Whirlpool	Appliances	↓6
52	Macy's	Retail/General	↑9
53	Chevrolet	Automotive	↑3
54	Albertsons	Retail/Grocery	N/C
55	GEICO	General insurance	↑17
56	Expedia	Travel/Booking	↑13
57	Toyota	Automotive	↓2
58	Kmart	Retail/General	↑18
59	Rite Aid Pharmacy	Retail/Health and beauty	↑9
60	Comfort Inn	Travel/Hotels	↓16
61	USPS	Shipping/Mail	↓19
62	Skype	Telecom/Cell phone	↑25
63	Dell	Electronics	↑3
64	GE	Appliances	↑6

	BRAND	INDUSTRY	RANK CHG
65	Ramada	Travel/Hotels	↑10
66	IKEA	Retail/General	↓46
67	Gap	Retail/Fashion	↓21
68	Motorola	Electronics	↑20
69	Adidas	Fitness	↓6
70	iTunes	Internet retail	↓30
71	Microsoft	Electronics	↑21
72	Yelp	Social media	↓1
73	Priceline.com	Travel/Booking	↑13
74	Orbitz	Travel/Booking	↑3
75	Sears	Retail/General	↑10
76	JetBlue Airways	Travel/Air	↓48
77	Marriott	Travel/Hotels	↓29
78	USA Today	Media	↓16
79	State Farm	General insurance	↑17
80	U.S. Bank	Banks/Retail	N/C
81	Chase	Banks/Retail	↑12
82	Best Western	Travel/Hotels	↓46
83	Canon	Electronics	↑1
84	The New York Times	Media	↑24
85	Hilton	Travel/Hotels	↓36
86	Bank of America	Banks/Retail	↑16
87	Nationwide	General insurance	↓6
88	Days Inn	Travel/Hotels	↓56
89	Amtrak	Travel/Train	↑23
90	The Wall Street Journal	Media	↑11
91	Twitter	Social media	↓9
92	Enterprise	Travel/Car rental	↓18
93	Google+	Social media	↑17
94	Hertz	Travel/Car rental	↑10
95	Citibank	Banks/Retail	↑19
96	CNN	Media	↓6

	BRAND	INDUSTRY	RANK CHG
97	Avis	Travel/Car rental	↓6
98	Wells Fargo	Banks/Retail	↑2
99	Volkswagen	Automotive	↓42
100	Budget	Travel/Car rental	↓6
101	Facebook	Social media	↑8
102	MSNBC	Media	↓5
103	Fox News	Media	↓4
104	T-Mobile	Telecom/Cell phone	↓25
105	United/Continental	Travel/Air	↑2
106	AllState	General insurance	↓3
107	Alamo	Travel/Car rental	↓24
108	LinkedIn	Social media	↑3
109	Delta Air Lines	Travel/Air	↓11
110	MetLife	General insurance	↑6
111	Sprint	Telecom/Cell phone	↓5
112	AT&T	Telecom/Cell phone	↑5
113	US Airways	Travel/Air	N/C
114	Verizon	Telecom/Cell phone	↑4
115	American Airlines	Travel/Air	↓10
116	DIRECTV	Telecom/Cable	↓1
117	Farmers	General insurance	↓22
118	DISH Network	Telecom/Cable	↑1
119	Aetna	Health insurance	↑2
120	UnitedHealthcare	Health insurance	N/C
121	CIGNA	Health insurance	↑4
122	Time Warner Cable	Telecom/Cable	↑2
123	HUMANA	Health insurance	↓1
124	Comcast	Telecom/Cable	↓1

*Change from previous year; N/A: Not applicable; N/C: No change
For methodology, see page 76–79.

1 **Internet Search**	**2** **Restaurants**	**3** **Retail/ Grocery**	**4** **Internet retail**	**5** **Electronics**
6 **Appliances**	**7** **Shipping/ Mail**	**8** **Travel/ Hotels**	**9** **Retail/ General**	**10** **Retail/ Fashion**
11 **Retail/Health and beauty**	**12** **Banks/ Retail**	**13** **Utilities**	**14** **Fitness**	**15** **Automotive**
16 **Travel/ Booking**	**17** **Media**	**18** **Telecom/ Cell phone**	**19** **Travel/Air**	**20** **Travel/ Car rental**
21 **Travel/Train**	**22** **Social media**	**23** **Telecom/cable providers**	**24** **General insurance**	**25** **Health insurance**

All brands can benefit from simplifying, but not all may benefit equally. To understand who has the most to gain, we compared brands based on two metrics. We then divided them into four categories based on their potential.

Simplicity Score
How simple a brand is perceived to be

HIGH SCORE/ LOW PREMIUM

Holiday Inn	Starbucks
Walmart	Old Navy
Victoria's Secret	Dunkin' Donuts
Burger King	Whole Foods
Chipotle	
Ford	

HIGH SCORE/ HIGH PREMIUM

Netflix	Sony
Apple	H&M
Nike	eBay
Honda	Sephora
Southwest Airlines	Panasonic

LOW SCORE/ LOW PREMIUM

Macy's	Hilton
Rite Aid Pharmacy	State Farm
	GEICO
United/ Continental	USPS
	Hertz
Chevrolet	
Enterprise	

LOW SCORE/ HIGH PREMIUM

Priceline.com	Microsoft
DISH Network	Orbitz
IKEA	Time Warner
Gap	JetBlue Airways
Marriott	DIRECTV

Simplicity Premium
How much more people are willing to pay for simpler experiences in the future
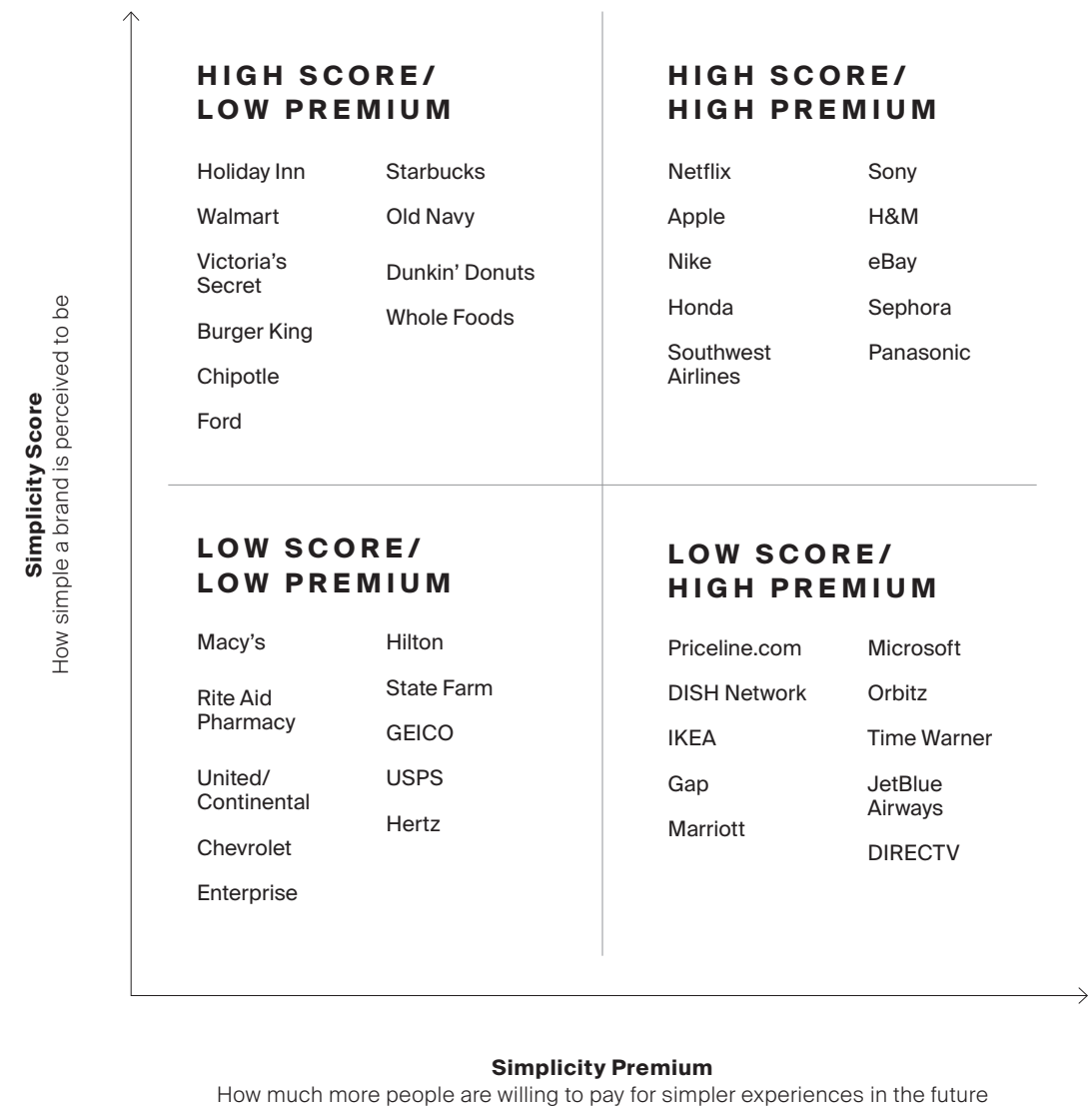
Chart includes the top 10 brands with the highest premium, in each category.

UNITE :D
KINGDOM

BRAND	INDUSTRY	RANK CHG*
1 Lidl	Retail/Grocery	N/A
2 Google	Internet search	↑3
3 Aldi	Retail/Grocery	↓2
4 Premier Inn	Travel/Hotels	↓1
5 Asda	Retail/Grocery	↑4
6 Sainsbury's	Retail/Grocery	↑1
7 McDonald's	Restaurants	↓3
8 Netflix	Media	N/A
9 Tesco	Retail/Grocery	↑15
10 Amazon	Internet retail	↓8
11 Travelodge	Travel/Hotels	↑5
12 Burger King	Restaurants	↑5
13 IKEA	Retail/General	↓1
14 Marks & Spencer	Retail/Grocery	↑9
15 Boots	Retail/Health and beauty	N/C
16 eBay	Internet retail	↑17
17 KFC	Restaurants	↓6
18 John Lewis	Retail/General	↓12
19 Ford	Automotive	↑7
20 Samsung	Electronics	↑9
21 YouTube	Social media	↑15
22 The Co-operative Food	Retail/Grocery	↑15
23 Waitrose	Retail/Grocery	↓9
24 Superdrug	Retail/Health and beauty	↓6
25 Sony	Electronics	↓3
26 Toyota	Automotive	↑54
27 Primark	Retail/Fashion	↓14
28 Channel 4	Media	↑42
29 Virgin Atlantic	Travel/Air	↑17
30 Yahoo!	Internet search	↑9
31 New Look	Retail/Fashion	↓12
32 British Airways	Travel/Air	↑24

BRAND	INDUSTRY	RANK CHG
33 First Direct	Banks/Retail	↓23
34 The Sun	Media	↓9
35 easyJet	Travel/Air	↑27
36 MSN	Internet search	↑28
37 Panasonic	Electronics	↑4
38 LG	Electronics	N/A
39 Canon	Electronics	↑10
40 Holiday Inn	Travel/Hotels	↓20
41 Debenhams	Retail/General	↑12
42 Guardian	Media	↑16
43 Starbucks	Restaurants	↓16
44 BBC	Media	↓36
45 Royal Mail	Shipping/Mail	↑5
46 H&M	Retail/Fashion	↓18
47 Expedia	Travel/Booking	↓16
48 Lastminute.com	Travel/Booking	↓27
49 Groupon	Internet retail	↓17
50 Intercontinental	Travel/Hotels	↑33
51 TSB	Banks/Retail	N/A
52 Virgin Money	Banks/Retail	↑32
53 NatWest	Banks/Retail	↑29
54 Three	Telecom/Cell phone	↓3
55 ZARA	Retail/Fashion	↑16
56 Vauxhall	Automotive	↓2
57 O2	Telecom/Cell phone	↑22
58 The Times	Media	↑11
59 Mercedes-Benz	Automotive	↑8
60 Dell	Electronics	↓3
61 HP	Electronics	↑11
62 Santander	Banks/Retail	↑30
63 Volkswagen	Automotive	↑27
64 Bosch	Appliances	↓20

BRAND	INDUSTRY	RANK CHG
65 Nationwide	Banks/Retail	↑9
66 Reebok	Fitness	↑11
67 Instagram	Social media	N/A
68 Philips	Electronics	↓21
69 Sky	Telecom/Cable	↑17
70 Adidas	Fitness	↓22
71 Apple	Electronics	↓36
72 Hilton	Travel/Hotels	↑6
73 Churchill	General insurance	↓8
74 Bing	Internet search	↓14
75 LV	General insurance	N/A
76 Nokia	Electronics	↓38
77 DHL	Shipping/Mail	↓14
78 Selfridges	Retail/General	↓48
79 Gap	Retail/Fashion	↓20
80 Google+	Social media	↑18
81 BMW	Automotive	↓15
82 Virgin Media	Telecom/Cable	↓14
83 FedEx	Shipping/Mail	↑13
84 Topshop	Retail/Fashion	↓42
85 Lloyds Bank	Banks/Retail	↑15
86 iTunes	Internet retail	↓31
87 Nike	Fitness	↓42
88 HSBC	Banks/Retail	N/C
89 Audi	Automotive	↑2
90 Peugeot	Automotive	↓29
91 Puma	Fitness	↓15
92 Direct Line	General insurance	N/A
93 Ryanair	Travel/Air	↑21
94 Lufthansa	Travel/Air	↓19
95 Facebook	Social media	↑6
96 Barclays	Banks/Retail	↓9

BRAND	INDUSTRY	RANK CHG
97 Skype	Telecom/Cell phone	↓24
98 More Than	General insurance	N/A
99 Harrod's	Retail/Fashion	↓5
100 Virgin Mobile	Telecom/Cell phone	↓7
101 Pinterest	Social media	N/A
102 BT	Telecom/Cable	↑4
103 Microsoft	Electronics	↓22
104 The Co-operative Bank	Banks/Retail	↓15
105 UPS	Shipping/Mail	N/C
106 Monarch Air	Travel/Air	↓54
107 The Financial Times	Media	↓73
108 EE (Everything Everywhere)	Telecom/Cell phone	↓4
109 Vodafone	Telecom/Cell phone	↓7
110 Parcelforce Worldwide	Shipping/Mail	↓25
111 Twitter	Social media	↓12
112 Aviva	Health insurance	↓9
113 The Royal Bank of Scotland	Banks/Retail	↓5
114 Bupa	Health insurance	↑2
115 Hertz	Travel/Car rental	↓20
116 TalkTalk	Telecom/Cell phone	↓7
117 British Gas	Utilities	↓4
118 Avis	Travel/Car rental	↓8
119 LinkedIn	Social media	↓7
120 npower	Utilities	↓2
121 SSE (Scottish and Southern Energy)	Utilities	↓10
122 E.ON	Utilities	↓7
123 EDF Energy	Utilities	↓16
124 ScottishPower	Utilities	↓5
125 AXA PPP Healthcare	Health insurance	↓5

*Change from previous year; N/A: Not applicable; N/C: No change
For methodology, see page 76–79.

1 Internet Search	2 Internet retail	3 Retail/ Grocery	4 Restaurants	5 Appliances
6 Electronics	7 Retail/ General	8 Travel/ Hotels	9 Retail/ Fashion	10 Travel/ Booking
11 Media	12 Automotive	13 Travel/Air	14 Shipping/ Mail	15 Retail/Health and beauty
16 Banks/ Retail	17 Telecom/ Cell phone	18 Telecom/cable providers	19 Social media	20 Travel/Train
21 Fitness	22 Travel/ Car rental	23 Utilities	24 General insurance	25 Health insurance

All brands can benefit from simplifying, but not all may benefit equally. To understand who has the most to gain, we compared brands based on two metrics. We then divided them into four categories based on their potential.

Simplicity Score
How simple a brand is perceived to be

HIGH SCORE/ LOW PREMIUM

Groupon	Tesco
John Lewis	Waitrose
Burger King	Expedia
Travelodge	Premier Inn
British Airways	Sainsbury's

HIGH SCORE/ HIGH PREMIUM

Toyota	Canon
Virgin Atlantic	Lastminute.com
LG	H&M
IKEA	Ford
Netflix	The Sun

LOW SCORE/ LOW PREMIUM

Legal & General	Gap
HP	iTunes
The Times	Microsoft
Virgin Media	Sky
EE	Lloyds Bank

LOW SCORE/ HIGH PREMIUM

Puma	Three
Lufthansa	Topshop
Harrod's	Reebok
Audi	Virgin Mobile
Apple	EDF Energy

Simplicity Premium
How much more people are willing to pay for simpler experiences in the future
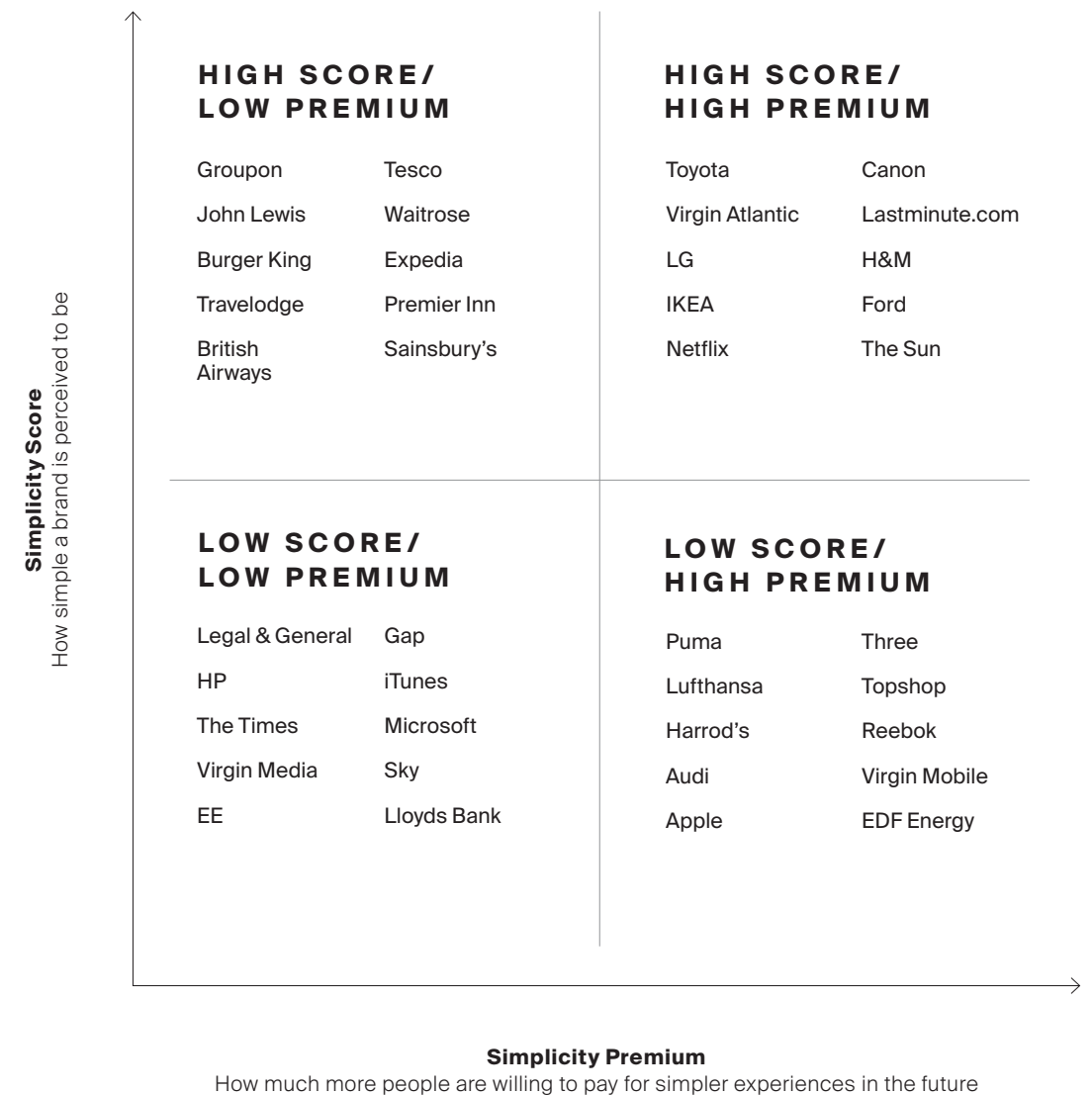
Chart includes the top 10 brands with the highest premium, in each category.

G:ERMANY

	BRAND	INDUSTRY	RANK CHG*
1	Google	Internet search	↑1
2	Aldi	Retail/Grocery	↓1
3	Tchibo	Retail/Grocery	↑7
4	IKEA	Retail/General	↑4
5	Lidl	Retail/Grocery	N/C
6	Edeka	Retail/Grocery	↑5
7	Budnikowsky	Retail/Health and beauty	↑19
8	DM	Retail/Health and beauty	↑11
9	Amazon	Internet retail	↓6
10	Penny Markt	Retail/Grocery	↓6
11	Zalando	Internet retail	↑14
12	BILD	Media	↓5
13	Volkswagen	Automotive	↑29
14	BonPrix	Retail/Fashion	↑20
15	Rossmann	Retail/Health and beauty	↑3
16	H&M	Retail/Fashion	↑20
17	eBay	Internet retail	↑18
18	McDonald's	Restaurants	↓12
19	Real	Retail/Grocery	↓7
20	OTTO	Internet retail	↑1
21	Douglas	Retail/Health and beauty	N/A
22	Miele	Appliances	↓13
23	Audi	Automotive	↑27
24	Media Markt	Retail/General	↓9
25	REWE	Retail/General	↓11
26	Ford	Automotive	↑27
27	Samsung	Electronics	↓10
28	C&A	Retail/Fashion	↓15
29	Bosch	Appliances	↓6
30	Bing	Internet search	↑16
31	KIK	Retail/Fashion	↓15
32	Saturn	Retail/General	↓4

	BRAND	INDUSTRY	RANK CHG
33	Yahoo!	Internet search	↓1
34	Müller	Retail/Health and beauty	↓14
35	Siemens	Appliances	↑4
36	BMW	Automotive	↑20
37	Nordsee	Restaurants	↓13
38	ZARA	Retail/Fashion	↑14
39	Mercedes-Benz	Automotive	↑22
40	Burger King	Restaurants	↓18
41	AEG	Appliances	↓12
42	Sony	Electronics	↓12
43	Apple	Electronics	↑23
44	YouTube	Social media	↑24
45	Opel	Automotive	↑18
46	EP/Elektronik Partner	Retail/General	↑13
47	MEDIMAX	Retail/General	↑4
48	Kaufhof	Retail/General	↓17
49	LG	Electronics	↓8
50	Nokia	Electronics	↓23
51	Holiday Inn	Travel/Hotels	↑23
52	Philips	Electronics	↓8
53	Canon	Electronics	↑2
54	KFC	Restaurants	↓5
55	RTL	Media	↓8
56	Nike	Fitness	↑13
57	Prosieben	Media	↓12
58	Hilton	Travel/Hotels	↓20
59	Vox	Media	↓19
60	Karstadt	Retail/General	↓6
61	Best Western	Travel/Hotels	↓4
62	Panasonic	Electronics	↓20
63	Vapiano	Restaurants	N/A
64	SAT 1	Media	↓17

	BRAND	INDUSTRY	RANK CHG
65	Marriott	Travel/Hotels	↓4
66	ING-DiBa	Banks/Retail	↑12
67	Dell	Electronics	↓10
68	HP	Electronics	↑1
69	TUI	Travel/Booking	↑12
70	Puma	Fitness	↑6
71	iTunes	Internet retail	↑19
72	Hermes	Shipping/Mail	↑3
73	Adidas	Fitness	↓10
74	Spiegel	Media	↓42
75	Skype	Telecom/Cell phone	↓1
76	Lufthansa	Travel/Air	↓4
77	Techniker Krankenkasse	Health insurance	↑5
78	Microsoft	Electronics	↓7
79	Sky	Media	↓15
80	Sixt	Travel/Car rentals	↓1
81	airberlin	Travel/Air	↑2
82	Reebok	Fitness	↓12
83	Deutsche Post	Shipping/Mail	↓24
84	Volksbanken Raiffeisenbanken	Banks/Retail	↑8
85	eplus	Telecom/Cell phone	N/A
86	Bayer	Retail/Health and beauty	N/A
87	BARMER GEK	Health insurance	↓1
88	AOK	Health insurance	↓4
89	Sparkasse	Banks/Retail	↑5
90	Deutsche Postbank	Banks/Retail	↑6
91	Thomas Cook	Travel/Booking	↑9
92	Germanwings	Travel/Air	N/A
93	easyJet	Travel/Air	N/A
94	Avis	Travel/Car rentals	↓1
95	O2	Telecom/Cell phone	↓7
96	Vattenfall	Utilities	↑6

	BRAND	INDUSTRY	RANK CHG
97	Vodafone	Telecom/Cell phone	↓2
98	Europcar	Travel/Car rentals	↓18
99	Hertz	Travel/Car rentals	↓12
100	RWE	Utilities	↓3
101	Commerzbank	Banks/Retail	N/C
102	Twitter	Social media	↓13
103	UPS	Shipping/Mail	↓18
104	Google+	Social media	↓1
105	Facebook	Social media	↓6
106	Xing	Social media	↑3
107	TARGOBANK	Banks/Retail	↓1
108	Deutsche Telekom	Telecom/Cell phone	↓4
109	Ryanair	Travel/Air	↓1
110	E.On	Utilities	↓3
111	AXA	General insurance	↑3
112	R+V Versicherung	General insurance	↓2
113	Wüstenrot	General insurance	↓2
114	Deutsche Bank	Banks/Retail	↓9
115	Allianz	General insurance	N/C
116	Deutsche Bahn	Travel/Train	↓4
117	Generall	General insurance	↓1
118	ERGO	General insurance	↓5

1 **Internet Search**	**2** **Retail/ Grocery**	**3** **Appliances**	**4** **Internet retail**	**5** **Retail/ General**
6 **Electronics**	**7** **Automotive**	**8** **Retail/Health and beauty**	**9** **Restaurants**	**10** **Media**
11 **Retail/ Fashion**	**12** **Travel/ Hotels**	**13** **Travel/ Booking**	**14** **Shipping/ Mail**	**15** **Travel/Air**
16 **Telecom/ Cell phone**	**17** **Utilities**	**18** **Health insurance**	**19** **Banks/ Retail**	**20** **Telecom/cable providers**
21 **Fitness**	**22** **Travel/ Car rental**	**23** **Travel/Train**	**24** **Social media**	**25** **General insurance**

All brands can benefit from simplifying, but not all may benefit equally. To understand who has the most to gain, we compared brands based on two metrics. We then divided them into four categories based on their potential.

Simplicity Score
How simple a brand is perceived to be

HIGH SCORE/ LOW PREMIUM

LG	KIK
Amazon	Burger King
Miele	C&A
Real	Tchibo
Douglas	Aldi

HIGH SCORE/ HIGH PREMIUM

Audi	Sony
Mercedes-Benz	Samsung
Apple	Siemens
Opel	IKEA
	BMW
	Satur

LOW SCORE/ LOW PREMIUM

Deutsche Telekom	German-wings
Philips	Vodafone
Hermes	Eplus
Commerz-bank	airberlin
	Allianz
	Deutsche Bank

LOW SCORE/ HIGH PREMIUM

Vapiano	Panasonic
KFC	Dell
iTunes	Puma
Nike	Adidas
Hilton	Canon

Simplicity Premium
How much more people are willing to pay for simpler experiences in the future

Chart includes the top 10 brands with the highest premium, in each category.

SWE:DEN

	BRAND	INDUSTRY	RANK CHG*
1	IKEA	Retail/General	↑1
2	Google	Internet search	↓1
3	Blocket	Internet retail	↑1
4	ICA	Retail/Grocery	↓1
5	Clas Ohlson	Retail/General	N/A
6	Netflix	Media	↓1
7	McDonald's	Restaurants	↑4
8	Coop	Retail/Grocery	↑5
9	Fritidsresor	Travel/Booking	↑1
10	Ving	Travel/Booking	↑13
11	Lidl	Retail/Grocery	↑3
12	Apoteket	Retail/Health and beauty	↑6
13	Viaplay	Media	↑9
14	Willys	Retail/Grocery	N/A
15	Burger King	Restaurants	↑5
16	cdon	Internet retail	↓10
17	Life	Retail/Health and beauty	↑63
18	Åhléns	Retail/General	↓10
19	YouTube	Social media	↓2
20	Max Burgers	Restaurants	↓5
21	Netto	Retail/Grocery	N/A
22	Apollo	Travel/Booking	↑32
23	Spotify	Social media	N/A
24	Volvo	Automotive	N/C
25	H&M	Retail/Fashion	↓6
26	Lindex	Retail/Fashion	N/C
27	Scandic Hotels	Travel/Hotels	↓20
28	Tradera	Internet retail	↓7
29	Apotek Hjärtat	Retail/Health and beauty	↑1
30	Hemköp	Retail/Grocery	↓3
31	Kronans Apotek	Retail/Health and beauty	↑17
32	Goeteborgs-Posten	Media	N/A

	BRAND	INDUSTRY	RANK CHG
33	Expressen	Media	N/A
34	Sony	Electronics	↓2
35	Samsung	Electronics	↓26
36	nelly.com	Internet retail	↑4
37	Statoil	Utilities	↓9
38	Lufthansa	Travel/Air	↑12
39	Aftonbladet	Media	N/A
40	Gina Tricot	Retail/Fashion	↑15
41	Dagens Nyheter	Media	N/A
42	KappAhl	Retail/Fashion	↓17
43	Nokia	Electronics	↓31
44	Yahoo!	Internet search	↓10
45	Apple	Electronics	↓14
46	SAS	Travel/Air	↑3
47	First Hotels	Travel/Hotels	↓8
48	Comviq	Telecom/Cell phone	↑8
49	Radisson	Travel/Hotels	↑24
50	Nordic Choice Hotels	Travel/Hotels	↓8
51	Adidas	Fitness	↑24
52	Dell	Electronics	↓9
53	Electrolux	Appliances	↓7
54	Handelsbanken	Banks/Retail	↓16
55	Ticnet	Travel/Booking	↑14
56	ViaSat	Media	↑6
57	Volkswagen	Automotive	↑6
58	Nike	Fitness	↑7
59	Best Western	Travel/Hotels	N/A
60	Bing	Internet search	↓17
61	DHL	Shipping/Mail	↓2
62	Comfort Hotels	Travel/Hotels	N/A
63	Skype	Telecom/Cell phone	N/A
64	Miele	Appliances	↓29

	BRAND	INDUSTRY	RANK CHG
65	Audi	Automotive	N/A
66	Tele2	Telecom/Cell phone	↑1
67	Länsförsäkringar	General insurance	↓11
68	Norwegian	Travel/Air	↓24
69	Reebok	Fitness	↑12
70	Bonnier	Media	↓19
71	Posten (Postnord)	Shipping/Mail	↓39
72	Ericsson	Telecom/Cell phone	N/A
73	Cylinda	Appliances	↓21
74	Ibis	Travel/Hotels	N/A
75	British Airways	Travel/Air	↑14
76	Bosch	Appliances	↓30
77	Schenker	Shipping/Mail	↓49
78	Siemens	Appliances	↓17
79	MQ	Retail/Fashion	↓29
80	Pizza Hut	Restaurants	↓44
81	Novotel	Travel/Hotels	N/A
82	Starbucks	Restaurants	↓13
83	Instagram	Social media	↓26
84	Puma	Fitness	↓13
85	Nordea Bank	Banks/Retail	↓25
86	AGRIA Insurance	General insurance	N/A
87	SEB	Banks/Retail	↓53
88	Mercure	Travel/Hotels	N/A
89	Facebook	Social media	↓12
90	Telenor Sverige	Telecom/Cell phone	↓2
91	Folksam	General insurance	↓25
92	Toyota	Automotive	↓52
93	TeliaSonera	Telecom/Cell phone	↓23
94	Hilton	Travel/Hotels	N/A
95	Swedbank	Banks/Retail	↓37
96	Google+	Social media	↓32

	BRAND	INDUSTRY	RANK CHG
97	Vattenfall	Utilities	↓11
98	Trygg-Hansa	General insurance	↓23
99	Saab	Automotive	↓8
100	Pinterest	Social media	↓6
101	Bredbandsbolaget	Telecom/Cable	↓23
102	Danske Bank	Banks/Retail	↓20
103	AFA Sjuk	General insurance	N/A
104	Bring	Shipping/Mail	↓19
105	E.ON Sverige	Utilities	↓18
106	Skandia	General insurance	↓16
107	Com Hem	Telecom/Cable	↓15
108	Hertz	Travel/Car rental	↓32
109	Canal Digital	Telecom/Cable	↓36
110	Twitter	Social media	↓26
111	Fortum	Utilities	↓14
112	LinkedIn	Social media	↓16
113	Avis	Travel/Car rental	↓30
114	SJ	Travel/Train	↓16
115	Ryanair	Travel/Air	↓16

*Change from previous year; N/A: Not applicable; N/C: No change
For methodology, see page 76–79.

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1 **Internet Search**	**2** **Retail/ Grocery**	**3** **Media**	**4** **Shipping/ Mail**	**5** **Retail/ General**
6 **Electronics**	**7** **Internet retail**	**8** **Appliances**	**9** **Restaurants**	**10** **Travel/ Hotels**
11 **Banks/ Retail**	**12** **Travel/ Booking**	**13** **Travel/Air**	**14** **Utilities**	**15** **Retail/ Fashion**
16 **Social media**	**17** **Retail/Health and beauty**	**18** **Travel/Train**	**19** **Telecom/ Cell phone**	**20** **Travel/ Car rental**
21 **Telecom/cable providers**	**22** **General insurance**	**23** **Fitness**	**24** **Automotive**	**25** **Health insurance**

All brands can benefit from simplifying, but not all may benefit equally. To understand who has the most to gain, we compared brands based on two metrics. We then divided them into four categories based on their potential.

Simplicity Score
How simple a brand is perceived to be

HIGH SCORE/ LOW PREMIUM

Blocket	Dagens Nyheter
Åhléns	H&M
Lindex	Max Burgers
Apotek Hjärtat	Netto
Aftonbladet	ICA

HIGH SCORE/ HIGH PREMIUM

Netflix	Viaplay
Volvo	Sony
Apple	Gina Tricot
Lufthansa	SAS
Samsung	Nokia

LOW SCORE/ LOW PREMIUM

Cylinda	Fortum
Trygg-Hans	E.ON Sverige
Electrolux	Telenor Sverige
TeliaSonera	Nordea Bank
Swedbank	Folksam

LOW SCORE/ HIGH PREMIUM

Dell	Canal Digital
Nike	Puma
Starbucks	Bredbandsbolaget
Adidas	Bosch
SJ	Comviq

Simplicity Premium
How much more people are willing to pay for simpler experiences in the future
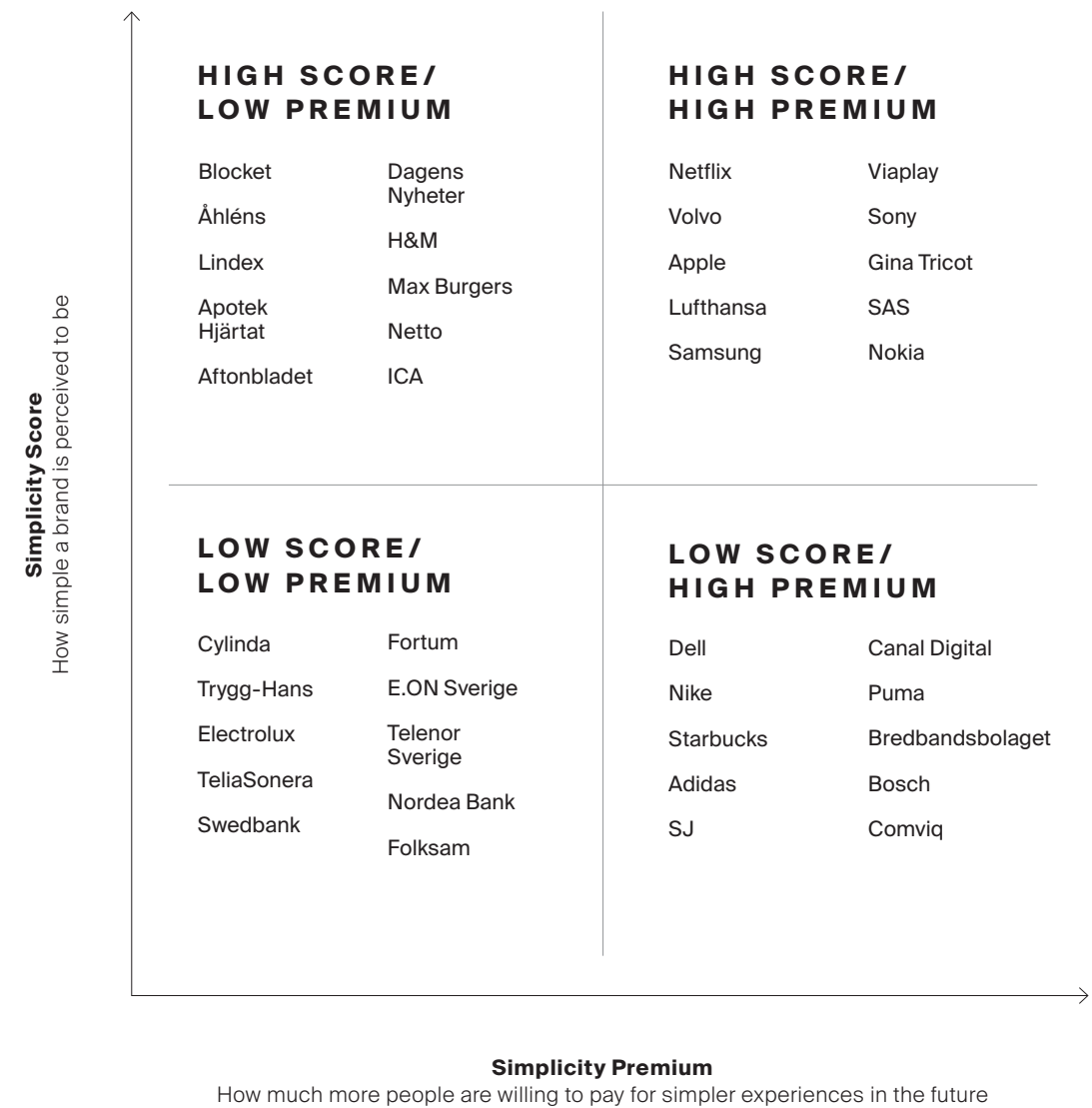
Chart includes the top 10 brands with the highest premium, in each category.

MID:DLE
EAST

	BRAND	INDUSTRY	RANK CHG*
1	Google	Internet search	N/C
2	YouTube	Social media	N/C
3	Al Baik	Restaurants	↑11
4	Samsung	Electronics	↓1
5	Toshiba	Electronics	↑7
6	Panda	Retail/Grocery	↓1
7	Sony	Electronics	↓3
8	Toyota	Automotive	↑22
9	Yahoo!	Internet search	N/C
10	Carrefour	Retail/Grocery	↑5
11	LG	Electronics	↑7
12	HTC	Electronics	↑39
13	Lenovo	Electronics	↑63
14	FlyDubai	Travel/Air	↑26
15	Alinma Bank	Banks/Retail	↑23
16	IKEA	Retail/General	↑8
17	HP	Electronics	↓9
18	Al Jazeera	Media	↑59
19	Microsoft	Electronics	↑10
20	Pizza Hut	Restaurants	↓3
21	McDonald's	Restaurants	↓15
22	Philips	Electronics	↑4
23	Emirates	Travel/Air	↑4
24	SACO	Retail/General	↑28
25	Zain	Telecom/Cell phone	↑22
26	Dell	Electronics	↓19
27	Twitter	Social media	↓4
28	Apple	Electronics	↓17
29	Facebook	Social media	↓19
30	The Saudi Investment Bank	Banks/Retail	↑86
31	dr. CAFÉ	Restaurants	↓10
32	Dubai Metro	Travel/Train	↑13

	BRAND	INDUSTRY	RANK CHG
33	Alriyadh	Media	↑6
34	Souq.com	Internet retail	↓21
35	eXtra	Retail/General	↓16
36	Nissan	Automotive	N/C
37	Arab News	Media	↑73
38	Asharq Al-Awsat	Media	↓3
39	Kudu	Restaurants	↓11
40	Adidas	Fitness	↓9
41	Herfy	Restaurants	↓16
42	KFC	Restaurants	↓22
43	ENOC	Utilities	↑50
44	SABB	Banks/Retail	↑50
45	Skype	Telecom/Cell phone	↓23
46	Namshi	Internet retail	N/A
47	The National	Media	↑68
48	Sharaf DG	Retail/General	↑16
49	Nike	Fitness	↓5
50	Starbucks	Restaurants	↑28
51	NEXT	Retail/Fashion	↑20
52	DHL	Shipping/Mail	↑35
53	Etisalat	Telecom/Cell phone	↓20
54	The Body Shop	Retail/Health and beauty	↑15
55	NCB	Banks/Retail	↓13
56	Dubai TV	Media	↑1
57	Abu Dhabi Commercial Bank	Banks/Retail	N/A
58	Saudia	Travel/Air	N/A
59	Mobily	Telecom/Cell phone	↓25
60	FedEx	Shipping/Mail	↓17
61	Gulf News	Media	↓45
62	ADNOC	Utilities	↑17
63	Home Centre	Retail/General	↓17
64	Qatar Airways	Travel/Air	↑9

	BRAND	INDUSTRY	RANK CHG
65	ZARA	Retail/Fashion	↓11
66	Saudi Railways	Travel/Train	↑45
67	H&M	Retail/Fashion	↓14
68	GMC	Automotive	↑4
69	Emirates NBD	Banks/Retail	↓10
70	Rotana	Travel/Hotels	↑22
71	du	Telecom/Cell phone	↓10
72	Aramex	Shipping/Mail	↓7
73	Paris Gallery	Retail/Health and beauty	↓7
74	UPS	Shipping/Mail	↑24
75	Al Arabiya	Media	↓19
76	Sephora	Retail/Health and beauty	N/A
77	Sheraton	Travel/Hotels	↑6
78	Marks & Spencer	Retail/General	↑19
79	Faces	Retail/Health and beauty	N/A
80	Al Tayyar	Travel/Booking	N/C
81	Choithrams	Retail/Grocery	↓40
82	Puma	Fitness	↓20
83	Debenhams	Retail/General	↑13
84	Holiday Inn	Travel/Hotels	↑19
85	Mercedes-Benz	Automotive	↓18
86	Audi	Automotive	↑35
87	Etihad Airways	Travel/Air	↓12
88	Spinneys	Retail/Grocery	↓56
89	iTunes	Internet retail	↑2
90	Reebok	Fitness	↓22
91	Orbit Showtime Network	Telecom/Cable	↑16
92	Saudi TV	Media	↑3
93	Gulf Air	Travel/Air	↓5
94	Dnata	Travel/Booking	↓57
95	HSBC	Banks/Retail	↑6
96	Chili's	Restaurants	↓48

	BRAND	INDUSTRY	RANK CHG
97	MANGO	Retail/Fashion	↓23
98	Marriott	Travel/Hotels	↓16
99	Budget	Travel/Car rental	↓13
100	Diesel	Retail/Fashion	↑8
101	Mashreq Bank	Banks/Retail	N/A
102	Hertz	Travel/Car rental	↑10
103	LinkedIn	Social media	↓13
104	STC	Telecom/Cell phone	↓49
105	Jumeirah	Travel/Hotels	↑8
106	Medgulf	General insurance	↑3
107	Bank Albilad	Banks/Retail	↓58
108	Daman	Health insurance	↑12
109	Al Rajhi Bank	Banks/Retail	↓25
110	BMW	Automotive	↑4
111	Siemens	Electronics	↓26
112	AXA	General insurance	↑10
113	Abu Dhabi Islamic Bank	Banks/Retail	N/A
114	Saudi Post	Shipping/Mail	↓44
115	Emirates Islamic Bank	Banks/Retail	↓26
116	Boots	Retail/Health and beauty	↓12
117	Amazon	Internet retail	↓57
118	Tawuniya	General insurance	↓19
119	Oman Insurance Company	General insurance	↓2
120	Avis	Travel/Car rental	↓2
121	Bupa	Health insurance	↓15
122	National Bank of Abu Dhabi	Banks/Retail	N/A
123	Topshop	Retail/Fashion	↓60
124	Citibank	Banks/Retail	↓24
125	Abu Dhabi National Insurance Company (ADNIC)	General insurance	↓6

*Change from previous year; N/A: Not applicable; N/C: No change
For methodology, see page 76–79.

1	2	3	4	5
Internet Search	Electronics	Social media	Restaurants	Appliances

6	7	8	9	10
Travel/Air	Media	Retail/ Grocery	Retail/ General	Fitness

11	12	13	14	15
Telecom/ Cell phone	Travel/ Booking	Retail/ Fashion	Travel/Train	Travel/ Hotels

16	17	18	19	20
Automotive	Retail/Health and beauty	Utilities	Internet retail	Shipping/ Mail

21	22	23	24	25
Banks/ Retail	Health insurance	Telecom/cable providers	Travel/ Car rental	General insurance

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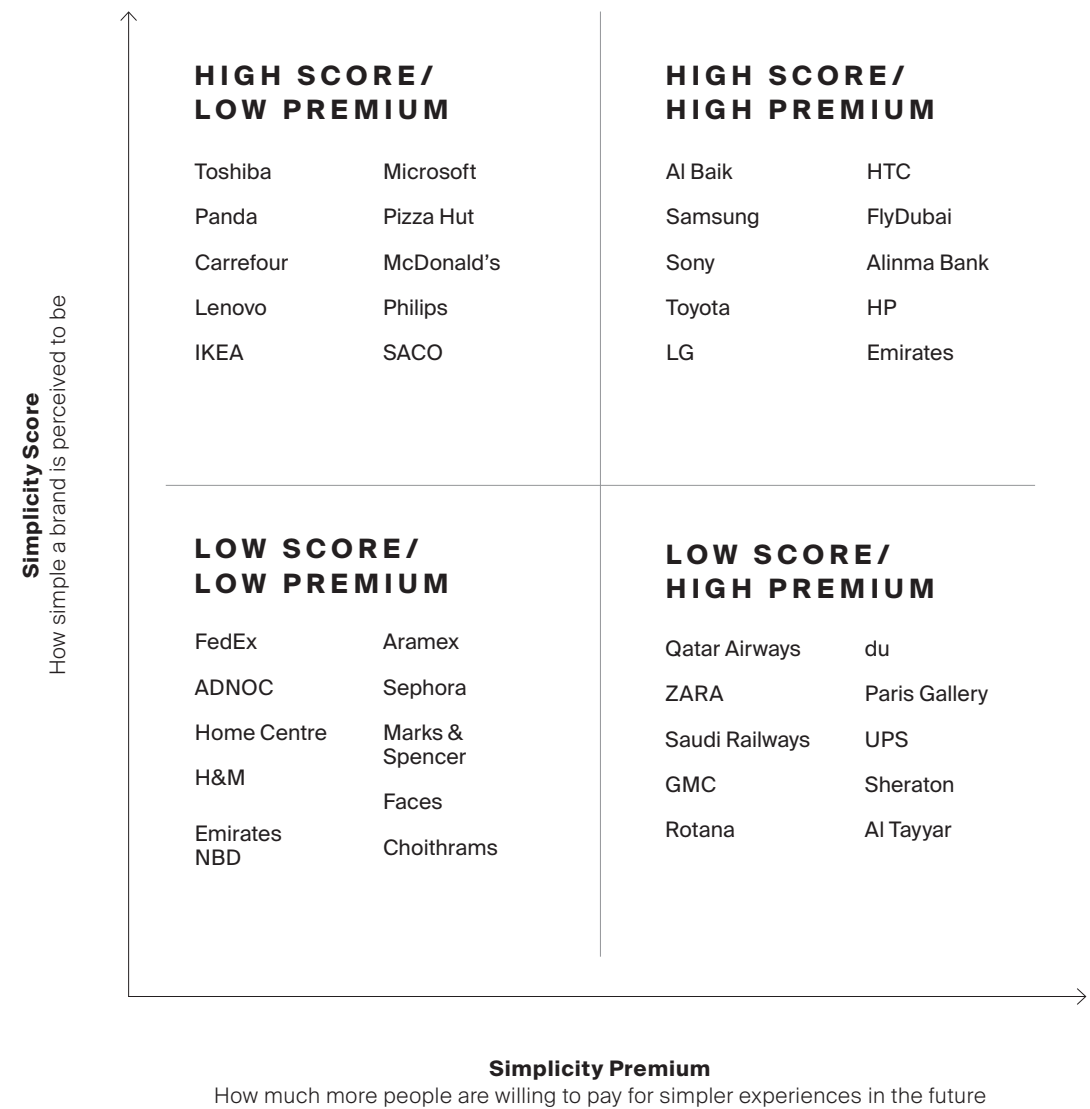
Simplicity Score
How simple a brand is perceived to be

HIGH SCORE/ LOW PREMIUM

Toshiba	Microsoft
Panda	Pizza Hut
Carrefour	McDonald's
Lenovo	Philips
IKEA	SACO

HIGH SCORE/ HIGH PREMIUM

Al Baik	HTC
Samsung	FlyDubai
Sony	Alinma Bank
Toyota	HP
LG	Emirates

LOW SCORE/ LOW PREMIUM

FedEx	Aramex
ADNOC	Sephora
Home Centre	Marks & Spencer
H&M	Faces
Emirates NBD	Choithrams

LOW SCORE/ HIGH PREMIUM

Qatar Airways	du
ZARA	Paris Gallery
Saudi Railways	UPS
GMC	Sheraton
Rotana	Al Tayyar

Simplicity Premium
How much more people are willing to pay for simpler experiences in the future

Chart includes the top 10 brands with the highest premium, in each category.

INDIA

	BRAND	INDUSTRY	RANK CHG*
1	Google	Internet search	N/C
2	Facebook	Social media	↑5
3	Dell	Electronics	↑6
4	Yahoo!	Internet search	↑1
5	The Times of India	Media	↓2
6	Microsoft	Electronics	N/C
7	Philips	Electronics	↑17
8	Nokia	Electronics	↓4
9	Sony	Electronics	↓1
10	YouTube	Social media	↑29
11	LG	Electronics	↑20
12	HP	Electronics	↑1
13	Bata	Internet retail	↑6
14	State Bank of India	Banks/Retail	↑11
15	airtel	Telecom/Cell phone	↓4
16	eBay	Internet retail	↓4
17	Adidas	Fitness	↑12
18	Snapdeal.com	Internet retail	↓3
19	Maruti Suzuki	Automotive	↓2
20	Canon	Electronics	↓10
21	Godrej	Appliances	↑11
22	Big Bazaar	Retail/General	↓1
23	Lee	Retail/Fashion	↑34
24	Domino's	Restaurants	↓4
25	Apple	Electronics	↓11
26	Nike	Fitness	↓3
27	McDonald's	Restaurants	↑9
28	Samsung	Electronics	↓26
29	Virgin Mobile	Telecom/Cell phone	↑60
30	Skype	Telecom/Cell phone	↓8
31	MakeMyTrip	Travel/Booking	↑7
32	Reebok	Fitness	↑13

	BRAND	INDUSTRY	RANK CHG
33	Yatra	Travel/Booking	↑13
34	Tata Sky	Telecom/Cable	↓7
35	Reliance Fresh	Retail/Grocery	↑6
36	Shoppers Stop	Internet/Retail	↑14
37	Bank of India	Banks/Retail	N/C
38	TVS Motor	Automotive	↑30
39	Lifestyle	Retail/General	↑13
40	Hero Motocorp	Automotive	↑18
41	Levi's	Retail/Fashion	↓25
42	Pizza Hut	Restaurants	↓24
43	Vodafone	Telecom/Cell phone	↓17
44	Himalaya Healthcare	Retail/Health and beauty	↑3
45	Volkswagen	Automotive	↑11
46	Groupon	Internet retail	↑16
47	Westside	Retail/General	↑19
48	Café Coffee Day	Restaurants	↓13
49	The Hindu	Media	N/C
50	Panasonic	Electronics	↑4
51	Taj	Travel/Hotels	↑19
52	Marriott	Travel/Hotels	↑36
53	HDFC Bank	Banks/Retail	↓13
54	Onida	Electronics	↑17
55	Travelguru	Travel/Booking	↑18
56	Pantaloons	Retail/General	↓12
57	Megamart	Retail/General	↓2
58	LIC	General insurance	↑22
59	LinkedIn	Social media	↑5
60	Spencer's	Retail/General	↓17
61	ITC	Travel/Hotels	↑6
62	Lakmé	Retail/Health and beauty	↓32
63	ICICI Bank	Banks/Retail	↓30
64	Tata DoCoMo	Telecom/Cell phone	↓30

	BRAND	INDUSTRY	RANK CHG
65	Cleartrip	Travel/Booking	↓14
66	Holiday Inn	Travel/Hotels	↑24
67	Godrej Nature's Basket	Retail/Grocery	↑18
68	Standard Chartered	Banks/Retails	↑25
69	Reliance Mobile	Telecom/Cell Phone	↑12
70	Peter England	Retail/Fashion	↓28
71	Bajaj Auto	Automotive	↑6
72	Haldiram	Restaurants	↓44
73	Barista	Restaurants	↓1
74	Videocon	Electronics	↓13
75	Jet Airways	Travel/Air	↑4
76	Toyota	Automotive	↓28
77	Tata Indicom	Telecom/Cell phone	↑5
78	Tata Motors	Automotive	↓19
79	BSNL	Telecom/Cell phone	↓3
80	Ford	Automotive	↑3
81	Haier	Appliances	↓28
82	DNA	Media	↑2
83	Air India	Travel/Air	↑8
84	Oberoi	Travel/Hotels	↑11
85	FedEx	Shipping/Mail	↓16
86	BlackBerry	Electronics	↓11
87	DHL	Shipping/Mail	↓9
88	Croma	Retail/General	↓28
89	MINT	Media	↑15
90	Ixigo	Travel/Booking	↑17
91	Hyatt	Travel/Hotels	↓17
92	Avis	Travel/Car rental	↑11
93	The Leela	Travel/Hotels	↓6
94	Travelocity	Travel/Booking	↑8
95	UPS	Shipping/Mail	↑1
96	ICICI Prudential	General insurance	↑4

	BRAND	INDUSTRY	RANK CHG
97	Viveks	Retail/General	↓5
98	Birla Sun Life	General Insurance	↓4
99	Hertz	Travel/Car rental	↑6
100	T24 Mobile	Telecom/Cell phone	↑6
101	HSBC	Banks/Retail	↓15
102	Bajaj Allianz	General insurance	↓1
103	Oriental Insurance	General insurance	↓4
104	Max Bupa	Health Insurance	↑5
105	TravelChaCha	Travel/Booking	↓7
106	IFFCO Tokio	General insurance	↑2
107	Peugeot	Automotive	↓10
108	Tata AIG	General insurance	↑2

*Change from previous year; N/A: Not applicable; N/C: No change
For methodology, see page 76–79.

1 **Internet Search**	**2** **Electronics**	**3** **Internet retail**	**4** **Appliances**	**5** **Banks/ Retail**
6 **Media**	**7** **Telecom/ Cell phone**	**8** **Utilities**	**9** **Retail/ Grocery**	**10** **Social media**
11 **Retail/ General**	**12** **Retail/ Fashion**	**13** **Travel/ Booking**	**14** **Automotive**	**15** **Travel/Train**
16 **Telecom/cable providers**	**17** **Travel/Air**	**18** **Travel/ Hotels**	**19** **Fitness**	**20** **Restaurants**
21 **Shipping/ Mail**	**22** **Retail/Health and beauty**	**23** **Travel/ Car rental**	**24** **Health insurance**	**25** **General insurance**

All brands can benefit from simplifying, but not all may benefit equally. To understand who has the most to gain, we compared brands based on two metrics. We then divided them into four categories based on their potential.
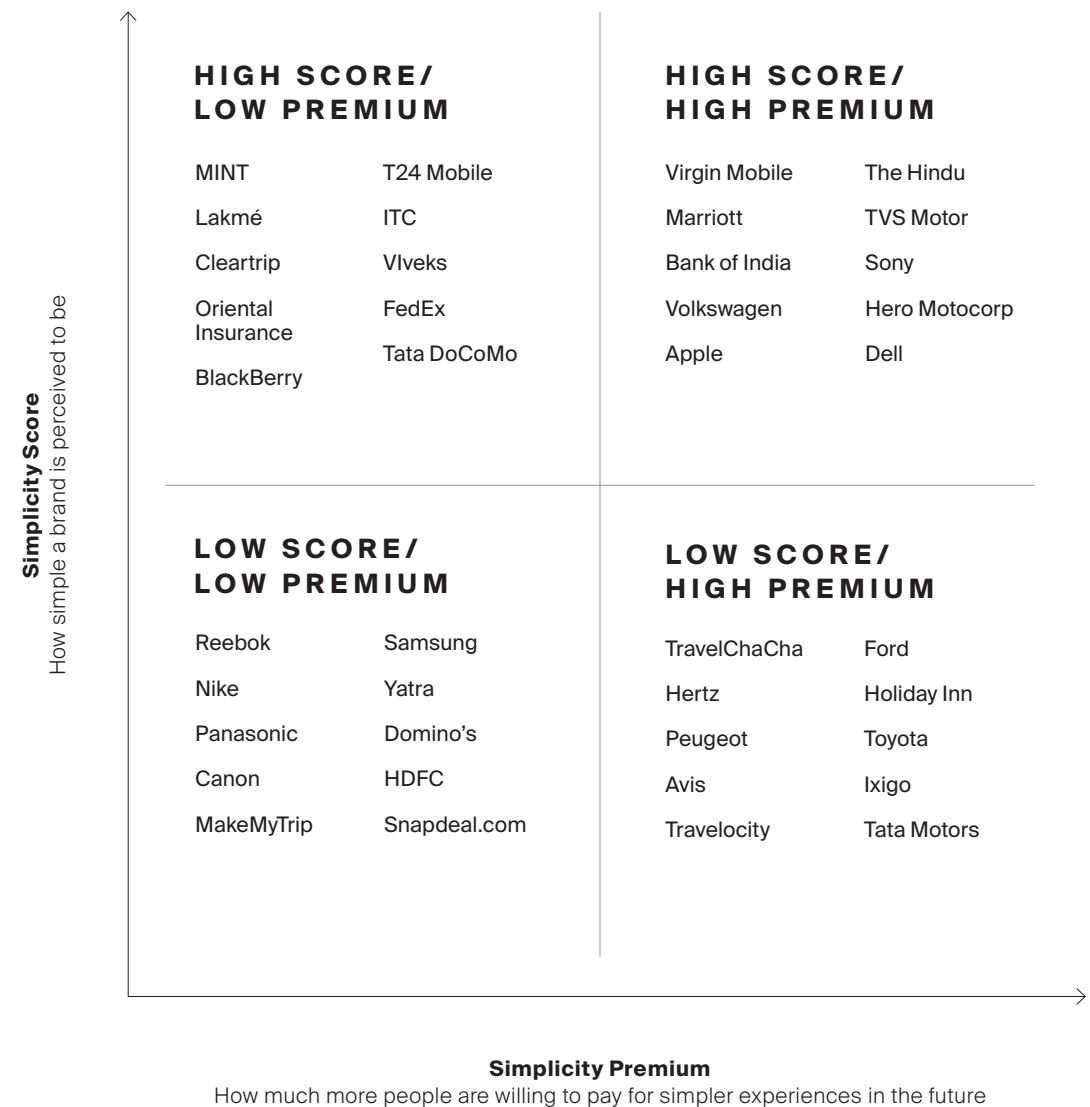
Simplicity Score
How simple a brand is perceived to be

HIGH SCORE/ LOW PREMIUM

MINT	T24 Mobile
Lakmé	ITC
Cleartrip	VIveks
Oriental Insurance	FedEx
	Tata DoCoMo
BlackBerry	

HIGH SCORE/ HIGH PREMIUM

Virgin Mobile	The Hindu
Marriott	TVS Motor
Bank of India	Sony
Volkswagen	Hero Motocorp
Apple	Dell

LOW SCORE/ LOW PREMIUM

Reebok	Samsung
Nike	Yatra
Panasonic	Domino's
Canon	HDFC
MakeMyTrip	Snapdeal.com

LOW SCORE/ HIGH PREMIUM

TravelChaCha	Ford
Hertz	Holiday Inn
Peugeot	Toyota
Avis	Ixigo
Travelocity	Tata Motors

Simplicity Premium
How much more people are willing to pay for simpler experiences in the future

Chart includes the top 10 brands with the highest premium, in each category.

CH:INA

	BRAND	INDUSTRY	RANK CHG*
1	Taobao.com	Internet retail	↑6
2	S.F. Express	Shipping/Mail	↑15
3	Baidu	Internet search	↓1
4	Tmall.com	Internet retail	↓1
5	McDonald's	Restaurants	↓1
6	Sogou	Internet search	↑6
7	KFC	Restaurants	↓2
8	Haidilao Hot Pot	Restaurants	↑3
9	QQ	Social media	↓3
10	Alipay	Banks/Retail	N/A
11	WeChat	Social media	↓10
12	Huawei	Electronics	↑42
13	OPPO	Electronics	↑8
14	Xiaomi	Electronics	↑14
15	Pizza Hut	Restaurants	↑4
16	7-Days Inn	Travel/Hotels	↑36
17	Sina	Media	↑29
18	Suning	Retail/General	↑40
19	Shentong Express	Shipping/Mail	↓5
20	Midea	Appliances	↑9
21	Youku	Social media	N/A
22	Home Inns	Travel/Hotels	↓2
23	Jinjiang Inns	Travel/Hotels	N/A
24	RT-mart	Retail/Grocery	N/A
25	YTO Express	Shipping/Mail	↑18
26	JD.com	Internet retail	↓1
27	Samsung	Electronics	↑41
28	Weibo	Social media	↑4
29	IKEA	Retail/General	↓21
30	ZARA	Retail/Fashion	↑29
31	Wal-Mart	Retail/Grocery	↑32
32	Yunda Express	Shipping/Mail	↓17

	BRAND	INDUSTRY	RANK CHG
33	Tudou	Social media	N/A
34	Yihaodian	Internet retail	↓12
35	Google	Internet search	↑30
36	Immomo	Social media	↑19
37	TCL	Electronics	↑7
38	Quanjude	Restaurants	↓20
39	Sohu	Media	↑37
40	Gree	Appliances	↓5
41	Ctrip	Travel/Booking	↓3
42	Carrefour	Retail/Grocery	↓18
43	Philips	Electronics	↑31
44	ANTA	Fitness	↓14
45	LY.com	Travel/Booking	↓19
46	Didi Kuaidi	Travel/Car rental	N/A
47	Phoenix Television (PHTV)	Media	↑30
48	Decathlon	Internet retail	↓17
49	Marriott	Travel/Hotels	↑36
50	iQIYI.com	Social media	↓37
51	ASUS	Electronics	↑31
52	GOME	Retail/General	↑14
53	Hisense	Appliances	↓4
54	Dianping	Social media	N/A
55	Netease	Media	↑12
56	Watsons	Retail/Health and beauty	↑25
57	Lifeweek	Media	N/A
58	Letv	Media	N/A
59	Qunar	Travel/Booking	↓43
60	Amazon	Internet retail	↑27
61	Adidas	Fitness	↓1
62	Hunan TV	Media	↓9
63	RenRen	Social media	↓22
64	Li-Ning	Fitness	↓7

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	BRAND	INDUSTRY	RANK CHG
65	Nike	Fitness	↓17
66	Lenovo	Electronics	↓43
67	UNIQLO	Retail/Fashion	↓28
68	Haier	Appliances	↓34
69	361 Degrees	Fitness	↓42
70	HP	Electronics	↑13
71	H&M	Retail/Fashion	↓35
72	BYD	Automotive	↑31
73	ZTE	Electronics	↓28
74	Douban	Social media	↓18
75	Sony	Electronics	↓4
76	Apple	Electronics	↓34
77	China Merchants Bank	Banks/Retail	↑17
78	Gap	Retail/Fashion	↓17
79	Hilton	Travel/Hotels	↑29
80	China Unicom	Telecom/Cell phone	↑19
81	Vivo	Electronics	N/A
82	Tongrentang	Retail/Health and beauty	↑24
83	Sasa	Retail/Health and beauty	↑13
84	eLong	Travel/Booking	↓74
85	Zuche.com	Travel/Car rental	N/A
86	Bosideng	Retail/Fashion	N/A
87	China Mobile	Telecom/Cell phone	↓36
88	Tuniu	Travel/Booking	↓16
89	LinkedIn	Social media	N/A
90	Changan	Automotive	↓1
91	Spring Airlines	Travel/Air	↓1
92	Sephora	Retail/Health and beauty	↓42
93	Lvmama	Travel/Booking	N/A
94	Mannings	Retail/Health and beauty	↓14
95	Hyundai	Automotive	↑5
96	Audi	Automotive	N/A

	BRAND	INDUSTRY	RANK CHG
97	Volkswagen	Automotive	↓4
98	EMS	Shipping/Mail	↑13
99	Southern Weekend	Media	↓30
100	Toyota	Automotive	↑1
101	HTC	Electronics	↓61
102	China Eastern Airlines	Travel/Air	↓18
103	Chery QQ	Automotive	↓39
104	AIA	General insurance	↑10
105	China Construction Bank	Banks/Retail	N/C
106	Hainan Airlines	Travel/Air	↓27
107	Bank of China	Banks/Retail	↑5
108	China Telecom	Telecom/Cell phone	↑2
109	ICBC	Banks/Retail	↑4
110	State Grid	Utilities	↑8
111	Bank of Communications	Banks/Retail	N/A
112	Agricultural Bank of China	Banks/Retail	↓3
113	China Southern Airlines	Travel/Air	↓35
114	China Gas	Utilities	N/A
115	China National Petroleum Corp	Utilities	N/C
116	Air China	Travel/Air	↓18
117	Geely	Automotive	↓42
118	South Beauty	Restaurants	↓26
119	New China Life	General insurance	↑3
120	Taikang Life	General insurance	↑1
121	Ping An Insurance	General insurance	↓4
122	China Life Insurance	General insurance	↓2
123	China Pacific Insurance	General insurance	↓4
124	People's Insurance Company of China	General insurance	↓1

*Change from previous year; N/A: Not applicable; N/C: No change
For methodology, see page 76–79.

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1 Internet Search	2 Internet retail	3 Electronics	4 Appliances	5 Restaurants
6 Media	7 Retail/General	8 Shipping/Mail	9 Retail/Grocery	10 Retail/Fashion
11 Travel/Train	12 Social media	13 Travel/Hotels	14 Travel/Booking	15 Telecom/Cell phone
16 Automotive	17 Retail/Health and beauty	18 Banks/Retail	19 Telecom/cable providers	20 Fitness
21 Travel/Air	22 Travel/Car rental	23 Utilities	24 Health insurance	25 General insurance

All brands can benefit from simplifying, but not all may benefit equally. To understand who has the most to gain, we compared brands based on two metrics. We then divided them into four categories based on their potential.

Simplicity Score
How simple a brand is perceived to be

HIGH SCORE/ LOW PREMIUM

Quanjude	S.F. Express
Qunar	Walmart
Amazon	JD.com
7-Days Inn	TCL
Haidilao Hot Pot	Hisense

HIGH SCORE/ HIGH PREMIUM

OPPO	Nike
Marriott	JinJiang
ZARA	ANTA
Huawei	IKEA
Immomo	Xiaomi

LOW SCORE/ LOW PREMIUM

Gap	Sasa
People's Insurance	South Beauty
H&M	Geely
Ping An Insurance	China Southern
Bank of Communications	Bosideng

LOW SCORE/ HIGH PREMIUM

Toyota	Apple
Audi	Hyundai
Hilton	BYD
eHi.com	Hainan Airlines
Chery QQ	Tongrentang

Simplicity Premium
How much more people are willing to pay for simpler experiences in the future
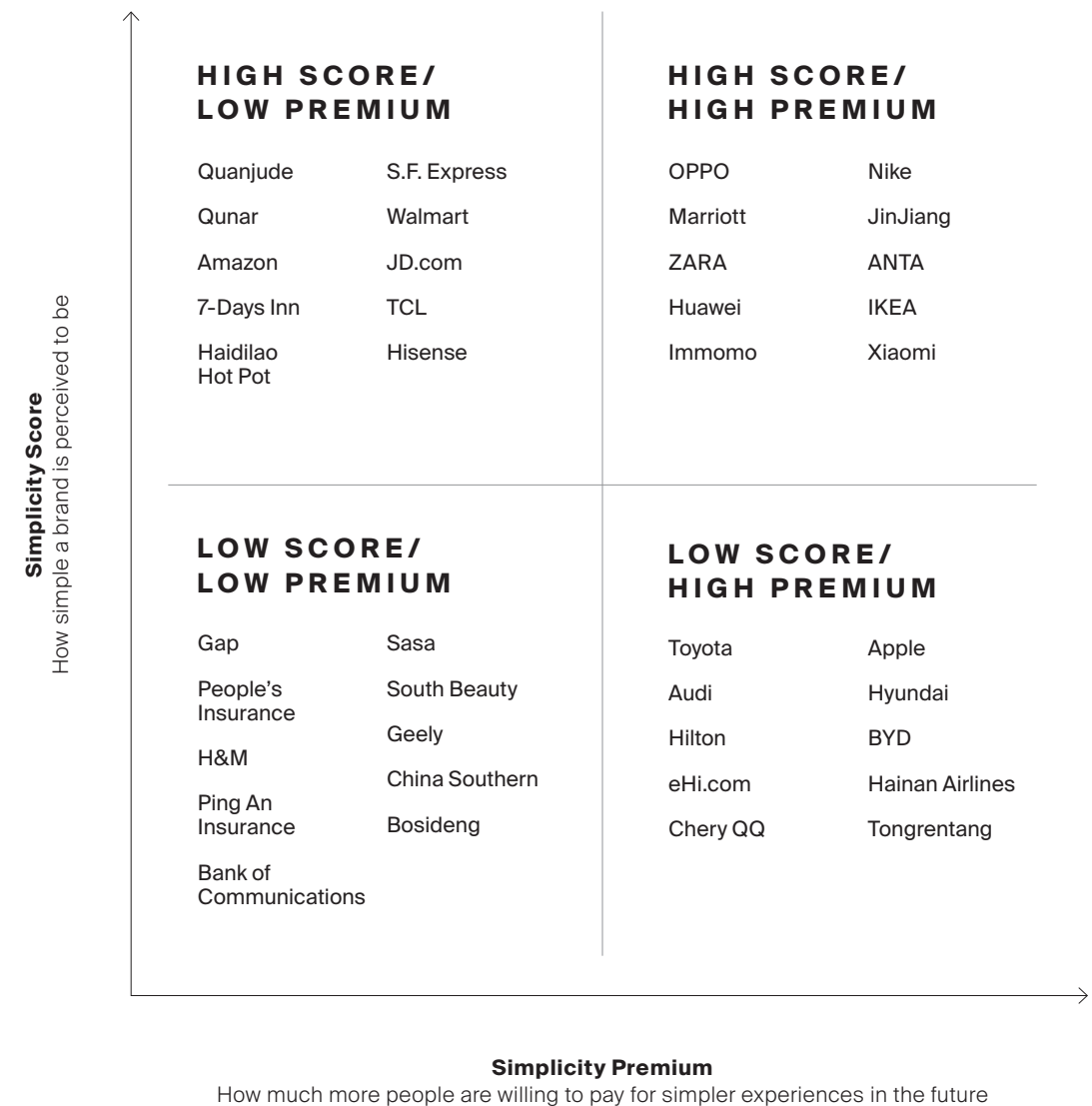
Chart includes the top 10 brands with the highest premium, in each category.

DISRUPTERS

Even the most simple brands can't rest on their laurels. With simplifying customer experiences as a core principle, disruptive brands are continuously changing consumer expectations. What are disrupters doing to deliver simpler customer experiences?

EMPOWERING PEOPLE

They sidestep traditional industry protocols and shift the power to consumers.

REIMAGINING EXPERIENCES

They turn underwhelming experiences into moments of delight.

REMOVING FRICTION

They identify pain points in everyday processes, and remove them.

SAVING TIME

They value people's time by providing services to them where and when they need it most.

PROVIDING UTILITY

They provide services that customers find inherently useful.

For the second year, we asked consumers in the US and UK to evaluate regionally relevant disrupters based on the simplicity of their products, services, interactions and communications. This is how they ranked.

UNITED STATES INDEX

1	2	3	4	5	6	7
Dollar Shave Club	Warby Parker	Seamless	GoPro	The Honest Company	Spotify	GrubHub
8	9	10	11	12	13	14
Pandora	Uber	Blue Apron	Square	FreshDirect	FitBit	Venmo
15	16	17	18	19	20	21
Airbnb	Etsy	My Fitness Pal	Hulu	HBO Now/ HBO Go	Ally	PayPal
22	23	24	25	26	27	28
Beats Radio	Jawbone Up	Amazon Prime	Google Wallet	Buzzfeed	Snapchat	Lyft
29	30	31	32			
Bleacher Report	WhatsApp	Gilt	RunKeeper			

UNITED KINGDOM INDEX

1	2	3	4	5	6	7
Grazebox	City Mapper	PayPal	WhatsApp	Tinder	GoPro	Airbnb
8	9	10	11	12	13	14
Spotify	Eventbrite	My Fitness Pal	RunKeeper	Nest	Uber	OVO Energy
15	16	17	18	19		
Snapchat	Nutmeg	Etsy	Dropbox	Reddit		

Between June 30th and August 11th 2015, Siegel+Gale used an online survey to poll:

8

Countries

12,358

Consumers

RESEARCH METHODOLOGY

To determine the global state of simplicity, Siegel+Gale fielded an online survey with more than 12,000 respondents in 8 countries to gather perspectives on simplicity and how industries and brands make people's lives simpler or more complex.

During the study, respondents rated a total of 585 brands. The brands were selected as a representative set that respondents would be most likely to know and/or use in each country.

1,750	1,743	1,750	1,757
United States	United Kingdom	Germany	Sweden

1,775	1,755	1,718
Mainland China	India	UAE and Saudi Arabia

SURVEY TOPICS

This year's respondents answered questions about brand touchpoints within specific industries and brands, as well as usage and perceptions of social media, including:

- Their perceptions of experiences and communications within 25 industry categories they experience in daily life

- How familiar they are with certain brands

- If they recently used these brands

- The simplicity/complexity of a brand's communications and interactions in relation to their industry peers

- Their willingness to pay more for brands they currently use if they provided simpler experiences

- Their usage of social media platforms, overall and for a set of tasks ranging from connecting with friends and family to handling customer service complaints

- Perceived simplicity of social media platforms, overall and by task

BRAND SIMPLICITY SCORE

Respondents in each country rated more than 100 brands (with respondents in the US and UK also ranking more than 40 disruptive companies). Siegel+Gale researchers used input from past surveys, in-country offices and existing third-party research to select a representative set of brands that in-country respondents would be most likely to use or experience. We are unable to report on smaller, lesser-known brands for which we could not collect sufficient responses.

The Brand Score was calculated with the following inputs:

- How each brand was rated on the simplicity/complexity of its products, services, interactions and communications in relation to its industry peers. User/non-user ratings were weighted to give more importance to the user experience and remove any possible bias for higher proportions of users for some of the brands

- How consistently the brand experience and communications were rated across respondents (the standard deviation of the ratings)

- How aligned non-user and user perceptions were, privileging aligned perceptions (the difference between user and non-user ratings)

- The Simplicity Score for the brand's industry or category(ies)

INDUSTRY SIMPLICITY SCORE

Each country rated the following industries: Appliances, Automotive, Banks/Retail, Electronics, Fitness, General insurance, Health insurance, Internet/Search, Internet/Retail, Media, Restaurants, Retail/Fashion, Retail/General, Retail/Grocery, Retail/Health and beauty, Shipping/Mail, Social media, Telecom/Cable, Telecom/Cell phone, Travel/Air, Travel/Booking, Travel/Car rental, Travel/Hotels, Travel/Train and Utilities.

The Industry Score was calculated with the following inputs:

- The industry's contribution to making life simpler or more complex

- The pain of typical interactions with companies/organizations within the industry

- How the industry's typical communications rank in terms of:
  - *Ease of understanding*
  - *Transparency/honesty*
  - *Communicating that customer needs are being cared for/making the customer feel valued and appreciated*
  - *Innovation/freshness*
  - *Usefulness*

SIEGEL+GALE IS THE SIMPLICITY COMPANY

We seek it, defend it and embrace it in everything we do to help brands reach their true potential. Simplicity is the centerpiece of the strategies we develop that reveal the unique truths of an organization, the engaging stories we create that connect brands with their audiences and the meaningful experiences we deliver that are both unexpectedly fresh and remarkably clear.

Since 1969, global strategic branding firm Siegel+Gale has championed simplicity for leading corporations, nonprofits and government organizations worldwide. We have offices in New York, Los Angeles, San Francisco, London, Dubai and Shanghai, but we're willing to fly just about anywhere. We're also not alone. As part of Diversified Agency Services, a division of Omnicom Group Inc., we have strong partners all around the world.
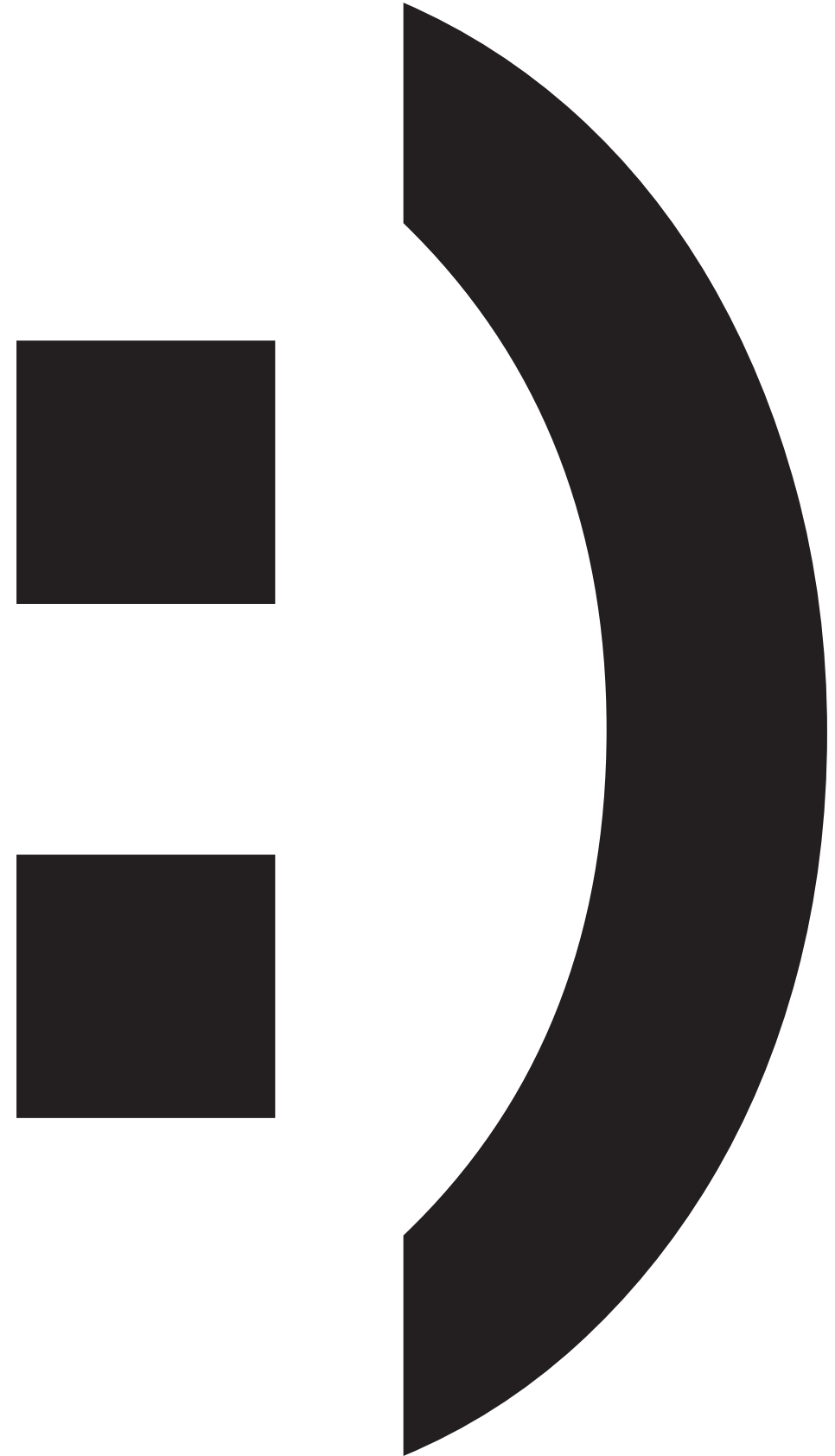
Siegel+Gale

Simple is smart.

NEW YORK

LOS ANGELES

SAN FRANCISCO

LONDON

DUBAI

SHANGHAI