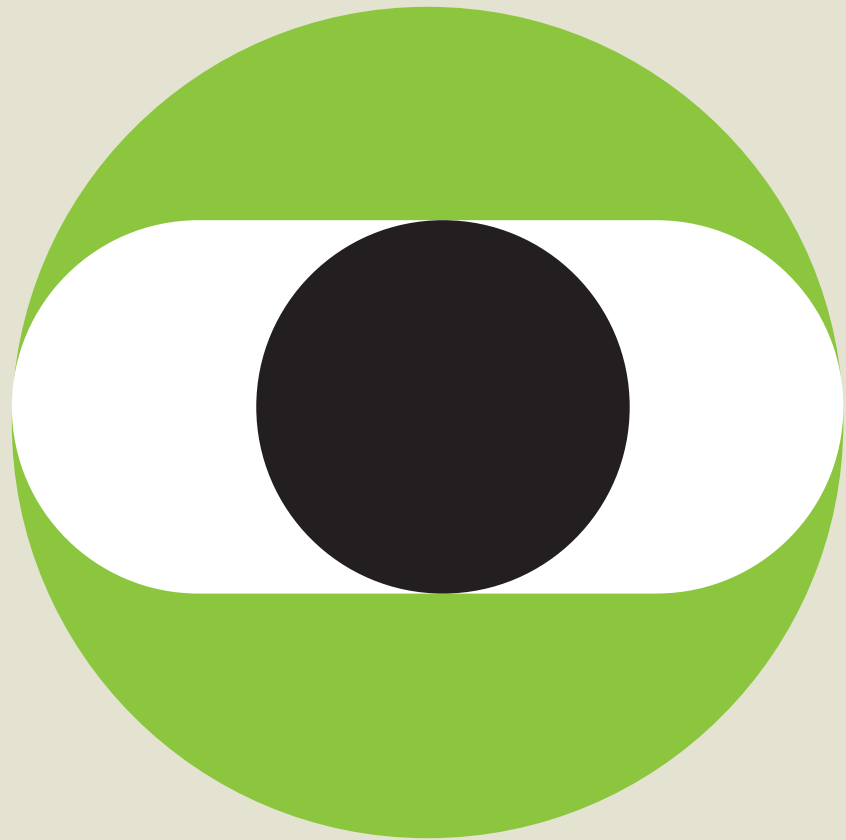


The FutureBrand Index

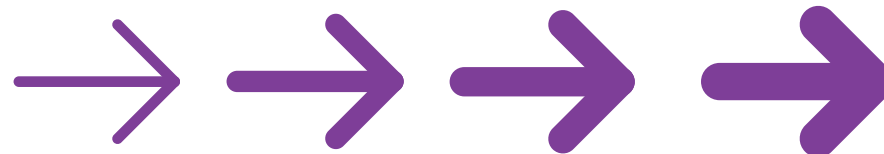


Measuring what matters for future success



100

FutureBrand



The creative future company.

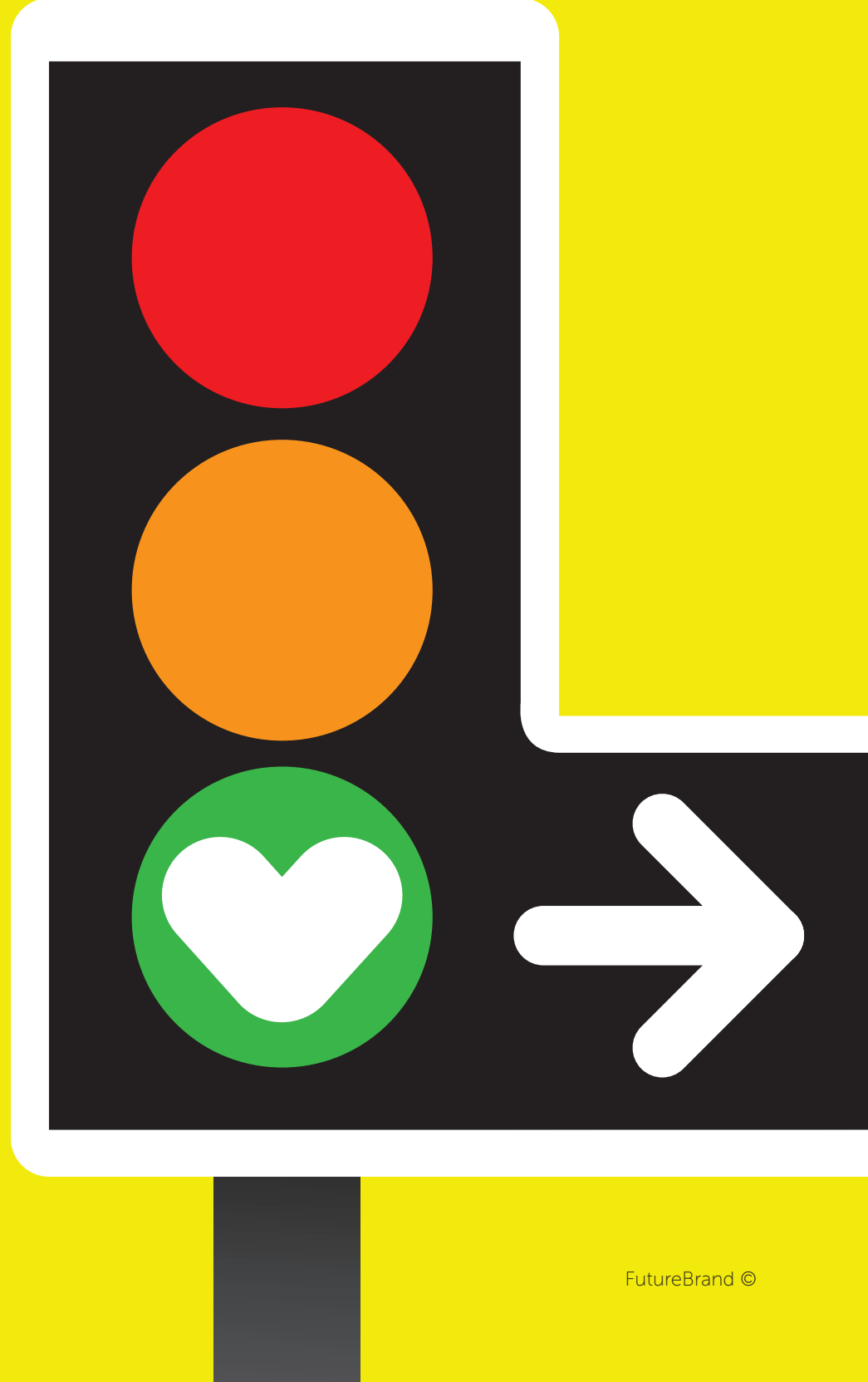
What's inside?

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- 5.0 Rankings by sector*
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Introduction

1.0 Introduction



What will drive future organizational success?

Organizational reputation has never mattered more.

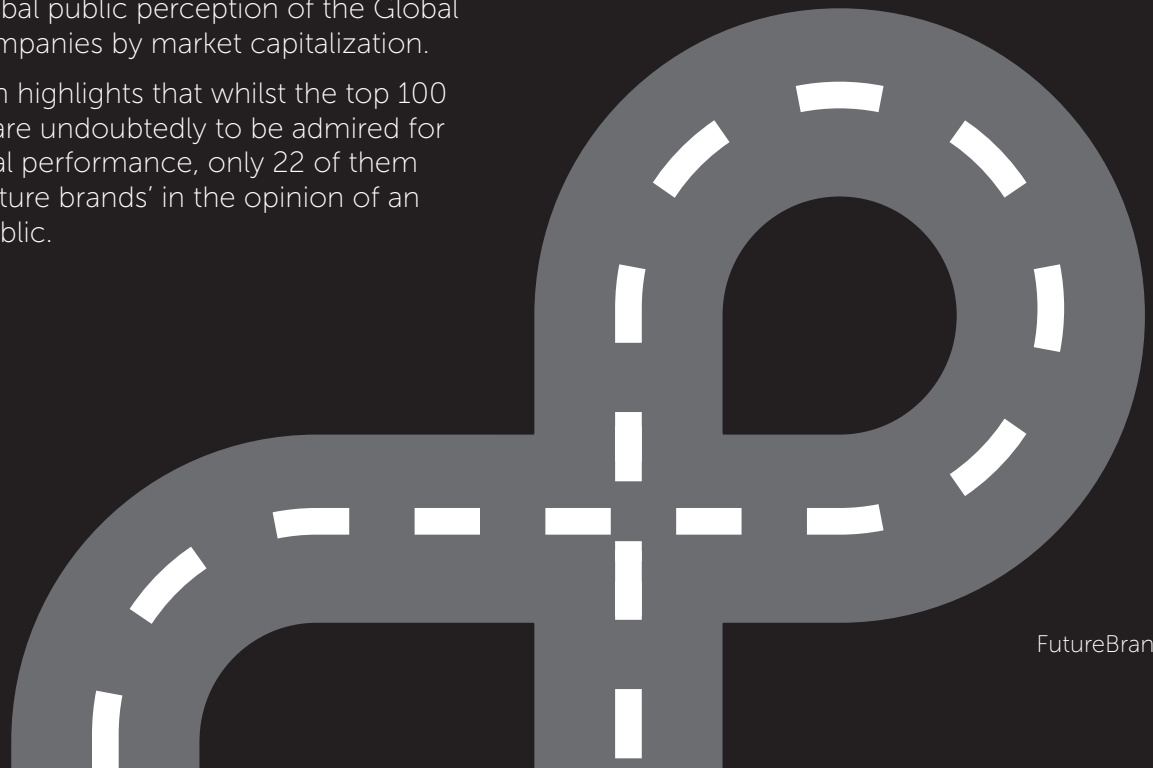
In an age of real-time global communication and transparency, constrained resources and macro-economic shifts to new centres of power, we are increasingly concerned about the beliefs and behaviours of the companies that provide the products and services we trust and depend on. Arguably, global perception of these companies makes a difference to their future reputation and value – they inform our decisions about what to buy, invest in and where to work. This is why it is critical to understand organizational brand strength as an input to strategies for future success. For example, as research by Weber Shandwick has revealed, company reputation provides things like product quality assurance, with 67% of consumers checking product labels to see what company is behind them. Despite this, we tend ultimately to reduce our understanding of their performance and strength to purely financial measures. However, financial value does not always correlate to perception strength: in other words, a high market capitalization does not guarantee a strong brand, nor inform the billions of everyday decisions that create our future.

Being seen as a ‘future brand’ offers a competitive advantage.

We believe 21st century brand strength is best understood in terms of the balance of perceptions between what a company stands for – its purpose – and how far it delivers on it – the resulting experience. And organizations that strike this balance will have a competitive advantage in the future. To test this hypothesis, we set out to measure global public perception of the Global Top 100 Companies by market capitalization.

Our research highlights that whilst the top 100 companies are undoubtedly to be admired for their financial performance, only 22 of them qualify as ‘future brands’ in the opinion of an informed public.

Why does this matter? Because when people rate a company highly in both areas, they are more likely to want to buy from, pay more and work for that company. This gives them an advantage now and in the future that is not dependent on their financial strength, but could be a driver of it tomorrow.



What will drive future organizational success?



We need to broaden our understanding of value.

So it is important to broaden our understanding of value to include how far a company is seen to address broader emotional and societal needs and wants – from fostering trust to driving innovation and being indispensable to our lives – and re-order the top 100 by those measures as an alternative indicator or ‘Index’ of future success. This is not least because they are the drivers of choice influencing more conventional measures of commercial performance – from sales to price premium and employer of choice. But also because when we look at global opinion around which of the top 100 companies are most likely to be ‘moving forward’ in three years, half of them are not even in the current top 20 by market capitalization. In addition to this, our research shows that the key drivers of a ‘future brand’ relate to strength of perception around thought leadership, innovation and authenticity, rather than commercial power.



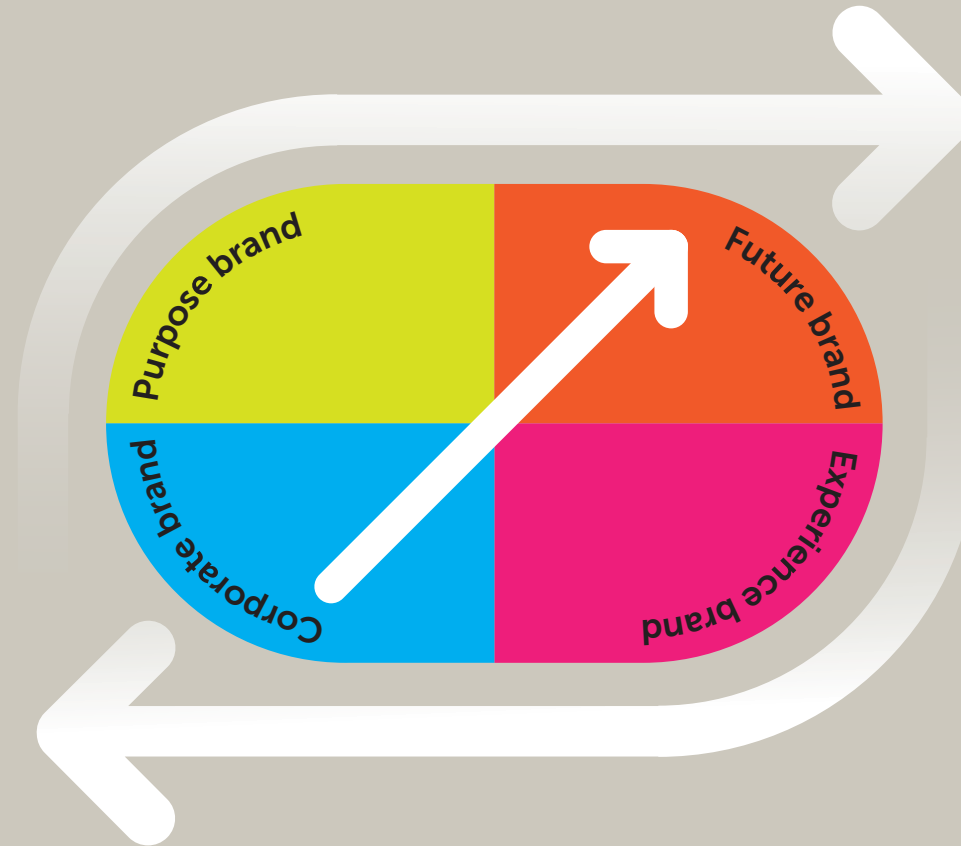
What does this mean for leaders?

This report aims to demonstrate that it has never been more important to understand global perceptions of your organization, and that even the most successful companies have levers they can pull for further competitive advantage. It provides a lens for understanding the drivers of future success by organization and industry sector based on global public perception. And perhaps most importantly, it demonstrates that 'brand strength' needs to be understood as the ability to balance decisions and perceptions relating to both 'why' you are here, and 'what' you do, beyond making money for shareholders.

Arguably, the organizations that achieve this will create a more positive future for themselves, their customers, investors and society as a whole.

Our methodology

2.0 Our methodology



2.1 Research approach

Quantitative and qualitative analysis

To test our hypothesis about the difference between perception and financial performance of the **Global Top 100 Companies** by market capitalization, we surveyed 3,030 members of the informed public in 17 countries around the world* (in the USA, Canada, Brazil, Argentina, Mexico, UK, Germany, France, Russia, Turkey, South Africa, UAE, India, China, Thailand, Japan and Australia).

Respondents were asked questions about those companies based on **FutureBrand's** proprietary brand strength model, as well as a series of other factors, and provided answers on a multiple choice and qualitative basis. This formed the basis of our quantitative analysis to develop a new ranking of the companies driven by strength of perception across 18 specific attributes within the dimensions of 'purpose' and 'experience'.

This absolute score against those two dimensions also allowed us to classify the organizations according to one of the following four typologies:

"Corporate brands" – Organizations that have weaker perceptions in both purpose and experience and fall into two further categories of 'indifference' and 'admiration'.

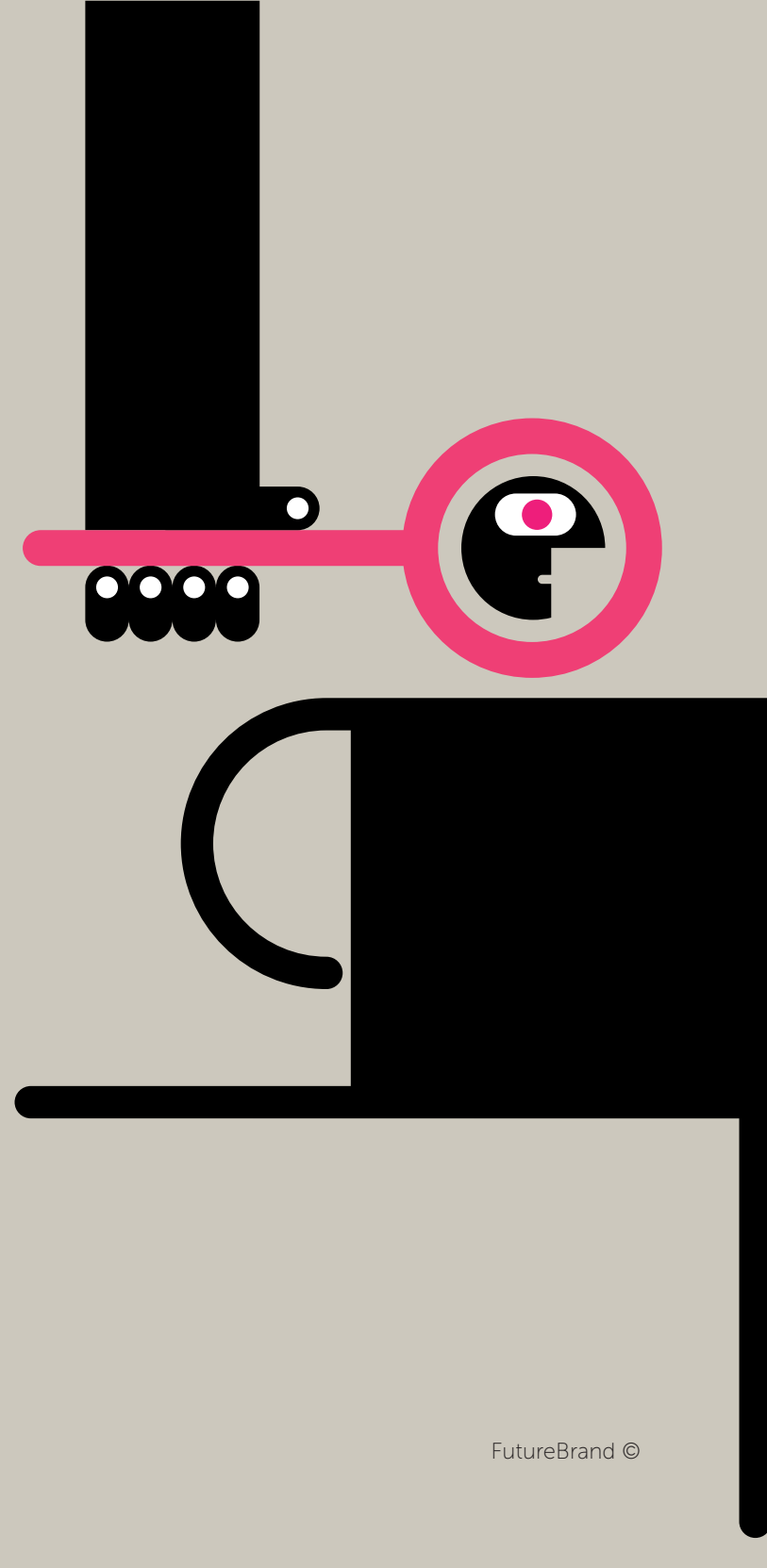
"Purpose brands" – Organizations whose perception strength is biased towards attributes relating to Purpose, Inspiration, Authenticity, Innovation, Thought Leadership, Individuality, Indispensability, Resource Management and Price Premium.

"Experience brands" – Organizations whose perception strength is biased towards attributes relating to Personality, Story, Attachment, Consistency, Seamlessness, People, Pleasure, Wellbeing and Respect.

"Future brands" – Organizations that have very strong and balanced perceptions across both the purpose and experience dimensions and can be seen as the most 'future proof'.

We used adaptive conjoint analysis to pick out the current and future drivers, patterns, strengths and weaknesses regarding the different regions and industries – driving our findings, industry sector rankings and organizations that the informed global public believe are the 'ones to watch'.

The qualitative responses, together with FutureBrand's expert opinion and knowledge, formed the basis of the sector drivers, the written commentary and world clouds for each leading sector organization and the broader future drivers of organizational success.



2.1 Research approach

QRi

QRi Consulting is FutureBrand's global research partner for the FutureBrand Index. Working in close collaboration, QRi helped to define the research approach against FutureBrand's initial hypothesis, as well as managing recruitment, questionnaire development, and providing in-depth analysis of the qualitative and quantitative data underpinning the report. This is informed by QRi's extensive research, brand and sector knowledge and experience as well as their proprietary QualiQuant methodologies.

PwC

FutureBrand has worked closely with the Capital Markets division of PwC in the UK, who kindly provided its Global Top 100 Companies by market capitalization ranking as the basis for this research and report. The report and its findings have been informed by Capital Markets' experience and expertise, but FutureBrand is responsible for all views, opinion and data emerging from this research unless otherwise stated.

**Quantitative Sample Criteria*

Our research respondents were screened as follows:

- By 'informed' we mean aware of & know something about at least 7 or more of the world's top 100 companies – our aim was to understand strength of perceptions and associations of those people who can show reasonable awareness.
- 21-75 years old, balanced between males & females, none were Unemployed or Students.
- Top professional, Chairman, MD, VP/SVP or other Very Senior Manager, Top Level Civil Servant, or similar.
- Skilled Professional, Departmental or Middle Manager, Senior Executive, Departmental or Head Teacher, or similar.
- Junior Manager, Junior Executive, Shop Owner or Owner of Small Establishment, Class Teacher, Nurse, or similar.



The dimensions and attributes of a 'future brand'

In order to qualify as a 'future brand', organizations need to have strong and balanced perceptions across the following dimensions and attributes.

N.B. Please see the Appendix for a detailed definition of each attribute by dimension.

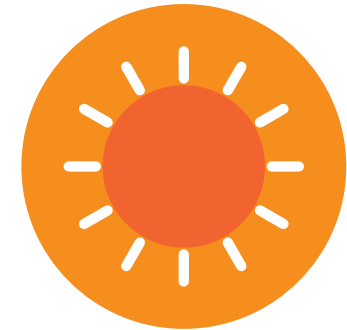
Experience



Builds a strong emotional connection:
Attributes - Personality,
Story, Attachment.

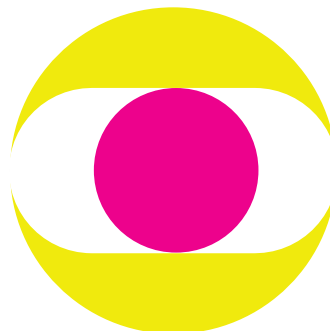


Engaging experience at every touch point:
Attributes: Consistency,
Seamlessness, People.

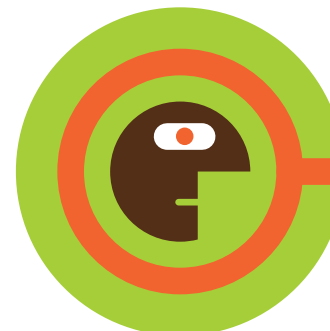


Makes Lives Better:
Attributes - Pleasure,
Wellbeing, Respect.

Purpose



Has a clear vision of the future:
Attributes - Purpose,
Inspiration, Authenticity.



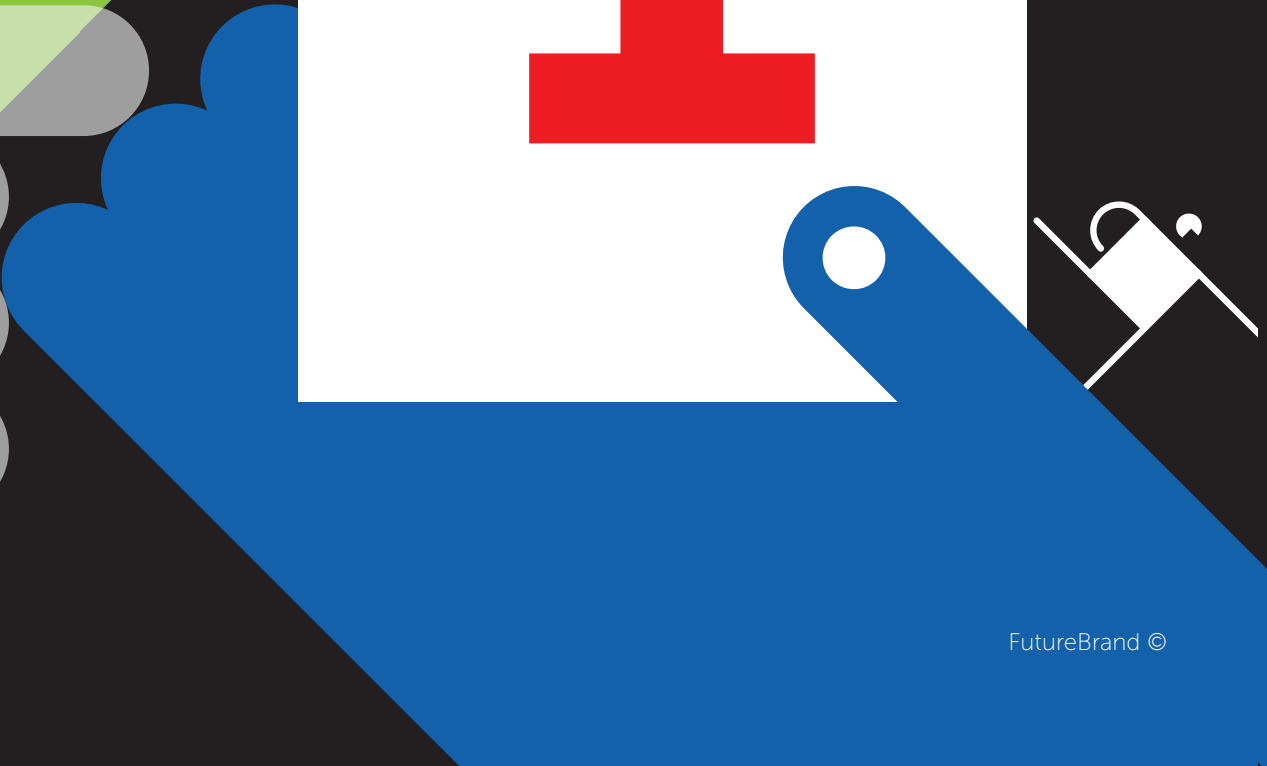
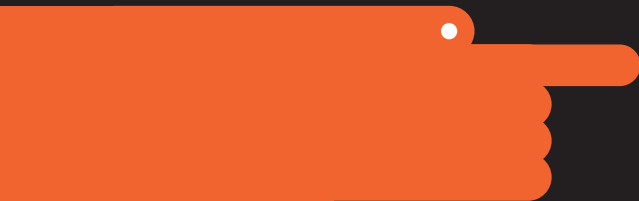
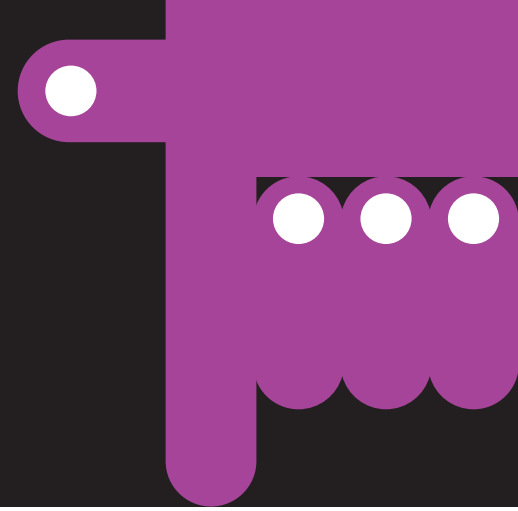
Redefines the category:
Attributes - Innovation,
Thought Leadership, Individuality.



Delivers sustainable value:
Attributes - Indispensability,
Resource Management, Price Premium.





















Global top 100 rankings

3.0 Global top 100 rankings



3.1. Global Top 100 Rankings




1–20











Brand	Ranking	Difference	Market Cap Ranking*	Sector	Brand	Ranking	Difference	Market Cap Ranking*	Sector
 Google	1	↑ 2	3	Technology	 Facebook	11	↑ 18	29	Technology
 Microsoft	2	↑ 2	4	Technology	 Boeing	12	↑ 64	76	Industrials
 Walt Disney	3	↑ 37	40	Consumer Services	 SABIC	13	↑ 72	85	Basic Materials
 Apple Inc.	4	↓ 3	1	Technology	 Visa	14	↑ 28	42	Financials
 Samsung Electronics	5	↑ 13	18	Consumer Goods	 Nestle	15	↓ 5	10	Consumer Goods
 Intel	6	↑ 43	49	Technology	 Mastercard	16	↑ 67	83	Technology
 Toyota	7	↑ 14	21	Consumer Goods	 Volkswagen	17	↑ 36	53	Consumer Goods
 Johnson & Johnson	8	↓ 1	7	Healthcare	 General Electric	18	↓ 10	8	Industrials
 Unilever	9	↑ 43	52	Consumer Goods	 Gilead Sciences	19	↑ 27	46	Consumer Goods
 IBM	10	↑ 14	24	Technology	 Abbvie	20	↑ 80	100	Technology

*Source: PwC Global Top 100 Companies by Market Capitalisation 2014

3.1. Global Top 100 Rankings

21–40











Brand	Ranking	Difference	Market Cap Ranking*	Sector
 L'Oréal	21	↑ 50	71	Consumer Goods
 Coca Cola	22	↑ 10	32	Consumer Goods
 Procter & Gamble	23	↓ 6	17	Consumer Goods
 LVMH Moët Hennessy	24	↑ 53	77	Consumer Goods
 Inditex	25	↑ 62	87	Consumer Goods
 GlaxoSmithKline	26	↑ 17	43	Healthcare
 Ambev SA	27	↑ 31	58	Consumer Goods
 Tencent 腾讯	28	↑ 10	38	Technology
 Siemens	29	↑ 25	54	Industrials
 Amazon	30	↑ 4	34	Consumer Services











Brand	Ranking	Difference	Market Cap Ranking*	Sector
 Pfizer	31	↓ 12	19	Healthcare
 Berkshire Hathaway	32	↓ 27	5	Financials
 Westpac Banking	33	↑ 48	81	Financials
 Oracle	34	↓ 7	27	Technology
 Bayer	35	↑ 20	55	Basic Materials
 Daimler	36	↑ 36	72	Consumer Goods
 TSMC	37	↑ 45	82	Technology
 Eco Petrol	38	↑ 57	95	Oil & Gas
 Walmart	39	↓ 28	11	Consumer Services
 3M	40	↑ 48	88	Industrials

*Source: PwC Global Top 100 Companies by Market Capitalisation 2014

3.1. Global Top 100 Rankings

41–60











Brand	Ranking	Difference	Market Cap Ranking*	Sector
 ANZ Bank	41	↑ 55	96	Financials
 BHP Billiton	42	↓ 16	26	Basic Materials
 Amgen	43	↑ 37	80	Healthcare
 SAP	44	↑ 29	73	Technology
 China Mobile	45	↓ 20	25	Telecommunications
 Home Depot	46	↑ 10	56	Healthcare
 PepsiCo	47	↑ 3	50	Consumer Goods
 Vodafone	48	↑ 12	60	Telecommunications
 CVS Caremark	49	↑ 44	93	Consumer Services
 Roche	50	↓ 16	34	Healthcare











Brand	Ranking	Difference	Market Cap Ranking*	Sector
 McDonald's	51	↑ 27	78	Consumer Services
 UPS	52	↑ 38	90	Industrials
 United Technologies	53	↑ 10	63	Industrials
 Novartis	54	↓ 40	14	Healthcare
 Royal Dutch Shell	55	↓ 43	12	Oil & Gas
 China Construction Bank	56	↓ 26	30	Financials
 Verizon	57	↓ 35	22	Telecommunications
 Allied Irish Banks	58	↑ 9	67	Financials
 Novo Nordisk	59	↑ 6	65	Healthcare
 Petrobras	60	↑ 30	90	Oil & Gas

*Source: PwC Global Top 100 Companies by Market Capitalisation 2014

3.1. Global Top 100 Rankings

61–80











Brand	Ranking	Difference	Market Cap Ranking*	Sector
 Cisco Systems	61	↓ 2	59	Financials
 Total	62	↓ 25	37	Oil & Gas
 American Express	63	↑ 12	75	Financials
 Bristol-Myers Squibb	64	↑ 25	89	Healthcare
 Citi Group	65	↓ 26	39	Financials
 Anheuser-Busch InBev	66	↓ 35	31	Consumer Goods
 Schlumberger	67	↓ 16	51	Oil & Gas
 HSBC	68	↓ 48	20	Financials
 AT&T	69	↓ 34	35	Telecommunications
 Merck	70	↓ 37	33	Healthcare











Brand	Ranking	Difference	Market Cap Ranking*	Sector
 Bank of America	71	↓ 43	28	Financials
 SoftBank	72	↑ 14	86	Telecommunications
 Sanofi	73	↓ 32	41	Healthcare
 BP	74	↓ 38	36	Oil & Gas
 Toronto Dominion Bank	75	↑ 22	97	Financials
 Chevron	76	↓ 61	15	Oil & Gas
 China Petroleum	77	↓ 7	70	Oil & Gas
 Industrial Commercial Bank of China	78	↓ 55	23	Financials
 Banco Santander	79	↓ 13	66	Financials
 Agricultural Bank of China	80	↓ 32	48	Financials

*Source: PwC Global Top 100 Companies by Market Capitalisation 2014

3.1. Global Top 100 Rankings

81–100

Brand	Ranking	Difference	Market Cap Ranking*	Sector
 Wells Fargo	81	↓ 72	9	Financials
 Statoil	82	↑ 12	94	Oil & Gas
 JP Morgan Chase & Co.	83	↓ 67	16	Financials
 Commonwealth Bank	84	↓ 23	61	Financials
 RBC Royal Bank	85	↓ 6	79	Financials
 Rio Tinto	86	↓ 24	62	Basic Materials
 Qualcomm	87	↓ 40	47	Technology
 Lloyds Banking Group	88	↓ 14	74	Financials
 Exxon Mobil	89	↓ 87	2	Oil & Gas
 BASF	90	↓ 26	64	Basic Materials

Brand	Ranking	Difference	Market Cap Ranking*	Sector
 British American Tobacco	91	↓ 23	68	Consumer Goods
 PetroChina	92	↓ 79	13	Oil & Gas
 ENI	93	↓ 1	92	Oil & Gas
 Philip Morris	94	↓ 49	45	Consumer Goods
 Union Pacific	95	↑ 3	98	Industrials
 COMCAST	96	↓ 52	44	Consumer Services
 GAZPROM	97	↓ 13	84	Oil & Gas
 中國銀行 BANK OF CHINA	98	↓ 41	57	Financials
 ConocoPhillips	99	--	99	Oil & Gas
 BNP PARIBAS	100	↓ 31	69	Financials

*Source: PwC Global Top 100 Companies by Market Capitalisation 2014

3.2 Key findings

1. Financial value and past performance are no guarantee of future brand strength.

The first and most striking finding from our research is that a high market capitalization does not always correlate with strong perceptions across our dimensions. In fact, some of the largest organizations by market capitalization have some of the weakest perceptions, and vice versa. For example, Exxon Mobil is currently ranked at number two by market capitalization, but is at 89th position in the FutureBrand Index. Less dramatic but significant ranking differences include JP Morgan and Petrochina. Alternatively, there are some organizations whose strength of perception is significantly higher than their financial strength, led by Walt Disney but also including Intel, Sabic, L'Oreal and Abbvie which benefits from the largest ranking differential of 80 places.

Some of these differences are perhaps reflective of broader sector challenges, for example the rankings for JP Morgan and PetroChina are typical of the kinds of differences we see in the financial and oil and gas industries as a whole. However, there is sufficient diversity in the top and bottom performers to indicate that some organizations are doing a better job of managing perception than others.



Vs.



3.2 Key findings



2. Being global makes a difference to brand strength.

Regardless of financial strength, organizations that are better known in individual markets, or which depend on fewer markets for their commercial success, tend to suffer from weaker perceptions in our study. And the best performers tend to be genuinely global, including most of the top 20 in our ranking. Of those organizations, 14 are American international companies, which shows that the USA still dominates the global corporate stage in terms of strength of perception, although being American on its own does not guarantee a high ranking. Wells Fargo is 9th by market capitalization globally, but drops to 81st position in our public perception rankings, and Bank of America is 71st. Similarly, perception strength does not seem to be restricted to specific sectors, with representation across every category in the top twenty except telecommunications, suggesting that global reach is as much a driver of perception strength as membership of a particular industry.

3. The value-perception gap for brands varies by sector.

Whilst the top 20 organizations tend to be global, and are distributed across the industries, it is clear that the value-perception gap is different by sector across the top 100, and some sectors perform more strongly than others. For example, financial and oil and gas companies tend to dominate the top 30% by market capitalization, but largely appear in the bottom 30% by strength of perception. 7 of the bottom 20 organisations in the FutureBrand Index are banks, and 6 are in Oil and Gas, and two of the bottom ten are tobacco companies, despite being in the top two thirds by capitalization. Conversely, technology and consumer services and goods companies dominate the FutureBrand Index top 10 and the market capitalization rankings, with a particular focus on consumer electronics, FMCG, software and entertainment.

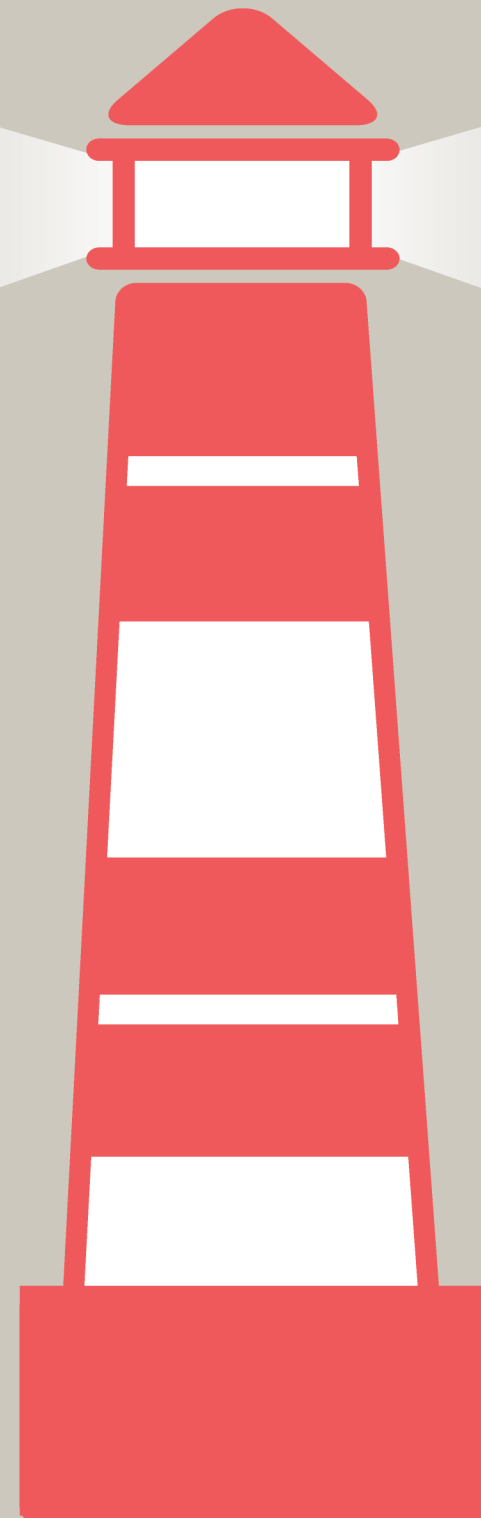
This reflects a broader reputational challenge for certain sectors as a whole – particularly banking in the wake of the global financial crisis – that seems to have a correlation to perceptions of individual organizations. It is as if people are unable to separate organizational perception from sector perception. There are some exceptions to this rule, including Eco Petrol in the Oil and Gas sector that is 57 places higher in the Index ranking than its financial position. So whilst it is certainly possible, it would appear that few organizations have managed to challenge or break out of their category positioning to stand for something new in the eyes of the public – a possible opportunity for companies keen to differentiate, or that have a genuine difference they are not being given credit for.

3.2 Key findings

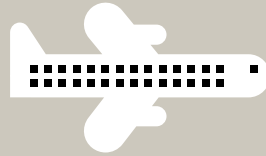
4. *Brand awareness is not enough to drive strong perceptions.*

A further striking finding of the research is that some of the most famous household name organizations that share their corporate name with their most famous product are outperformed in strength of perception by companies with significantly lower awareness. For example, whilst Coca-Cola (22), PepsiCo (47) and McDonald's (51) all enjoy a higher ranking in the FutureBrand Index than their market cap position, they are still lower than more niche or anonymous organizations without the same high levels of public awareness, like Sabic (in 13th position) in Basic Materials, and Gilead and Abbvie (respectively 19th and 20th overall) in the Healthcare sector. Other organizations that have significant public awareness through global advertising and reach like HSBC, or exposure through international events and longevity like BP, enjoy a lower strength of perception ranking in our research than their market capitalization position. This perhaps correlates again to negative or weaker perceptions of their sector overall, or individual reputational issues, but it presumably cannot be reduced to these factors alone given the often difficult reputation

challenges faced by pharmaceutical companies and their relatively strong performance in the Index overall. It also perhaps reflects a broader public preoccupation with consumer electronics and internet services organizations that have come to dominate the global discourse around consumption in the last decade, perhaps overshadowing their still popular but less relevant counterparts in food and beverage – hinting that Google and Apple are the Coca-Cola and McDonald's of the 21st century.



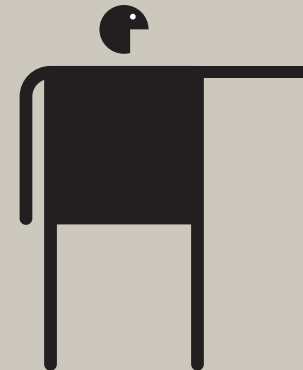
3.2 Key findings



5. Chinese companies and brands are not yet future proof.

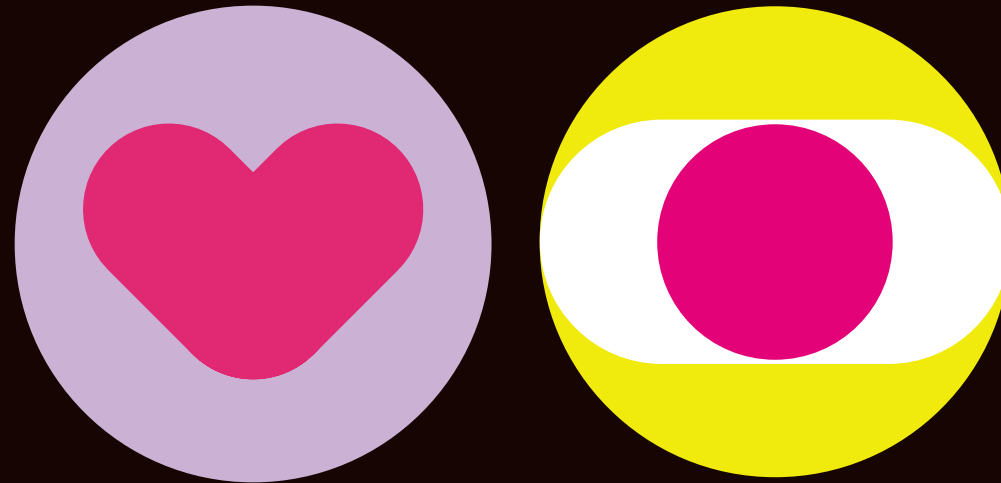
The only two Chinese companies in the top half of the FutureBrand Index ranking are Tencent (28th) and China Mobile (45th), with four of the remaining five falling into the bottom quartile, including ICBC (78th) and PetroChina (98th), which are 55 and 79 positions lower than their market cap ranking respectively. Unlike the majority of American International companies that have genuinely global reach, it is arguable that whilst the largest Chinese organizations are undoubtedly financially strong – reflecting China’s vast consumer market, growth and economic position – they do not yet have strong global perceptions. As a result, they are not as future proof, or as insulated by strong reputation, as their East Asian counterparts like Samsung and Toyota that genuinely address global markets and sell products and services to customers worldwide. Toyota is a good example of how brand strength can provide some insulation against commercial difficulties, given its position in the top 10 by perception at a time of global product recalls.

However, whilst this might be true now, it is likely that as Chinese organizations expand into new markets across Asia and beyond, they will begin to benefit from the same awareness as their better-established global counterparts. We see this in our ‘ones to watch’ forecasts with two of the eight organisations seen to be ‘moving forward’ in three years time being Chinese. The key will be how well these companies manage perception and attend to the balance of purpose and experience, to ensure they are not just financially strong and secure across markets, but that they are the kind of companies people want to work for, and for whose products and services they are prepared to pay a premium.



What is a future brand and why does it matter?

4.0 What is a future brand and why does it matter?

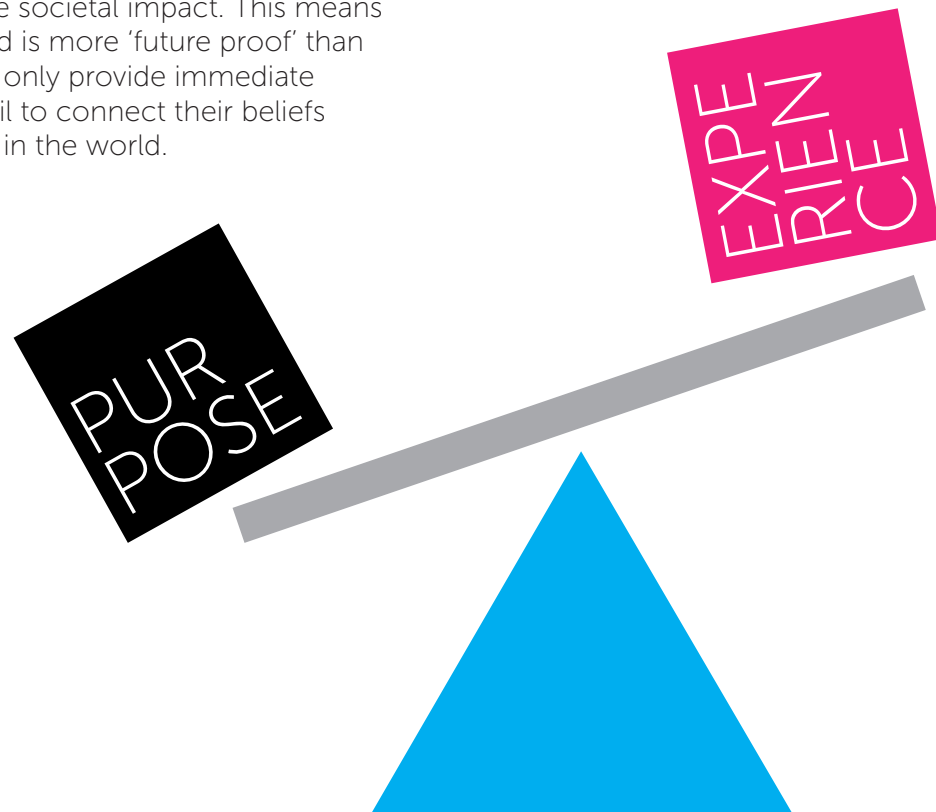


What is a future brand and why does it matter ?

4.1 What is a future brand?

A 'future brand' is a brand that is more likely to succeed in the future, not just one that is strong now. This is because it perfectly balances strong perceptions of its purpose in the world with the experience it delivers. In terms of experience, it ensures that it always has a strong emotional connection, delivers consistency across every touch point and focuses on improving peoples' lives. In terms of purpose, it is seen to have a strong vision for the future, to drive and redefine its category and deliver sustainable business value in everything from resource management to price differentiation. The balance of these two elements is vital because it attends to the way we make decisions in the 21st century: avoiding a compromise between what we want now and what we need later.

It means fast cars with zero emissions, profitability with ethics, taste and health, and shareholder value with positive societal impact. This means that a future brand is more 'future proof' than counterparts that only provide immediate gratification, or fail to connect their beliefs with their actions in the world.

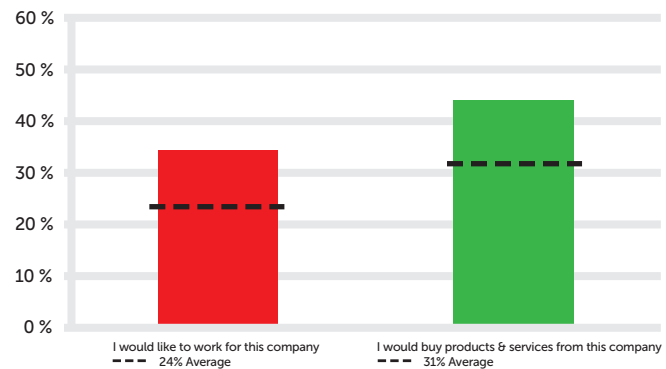


What is a future brand and why does it matter ?

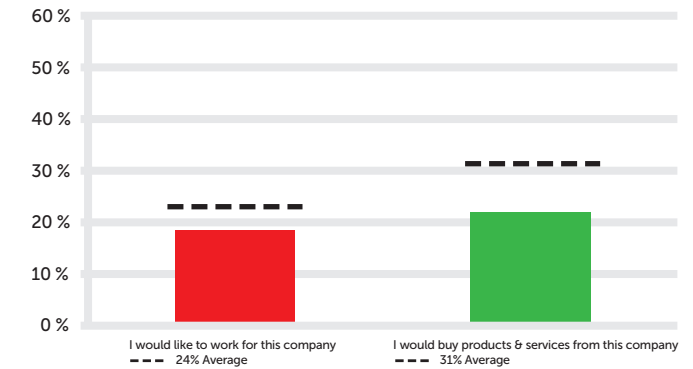
4.2 Why does it matter?

Our research shows that this matters for organizations because when people rate a company in the Global Top 100 as a 'future brand', 75% strongly agree that they would buy products and services from them, 68% strongly agree that the organization commands a price premium, and nearly two thirds strongly agree that they would work for them. And these preferences are significantly above the average performance across our study. So being a future brand is a driver of choice when it comes to purchase decisions, paying a premium and selecting an employer. For example, nearly half of all those surveyed say they would like to work for Walt Disney Company and Google (against an average of 24%), and 48% of our respondents say they would buy products and services from Toyota (against an average of 31%). This is compared to organizations with weaker perceptions against our dimensions like Walmart, McDonald's, Shell and AT&T that have below average appeal to our respondents as places to work.

'Future brands'
Would work for and buy products/services



'Corporate brands'
Would work for and buy products/services

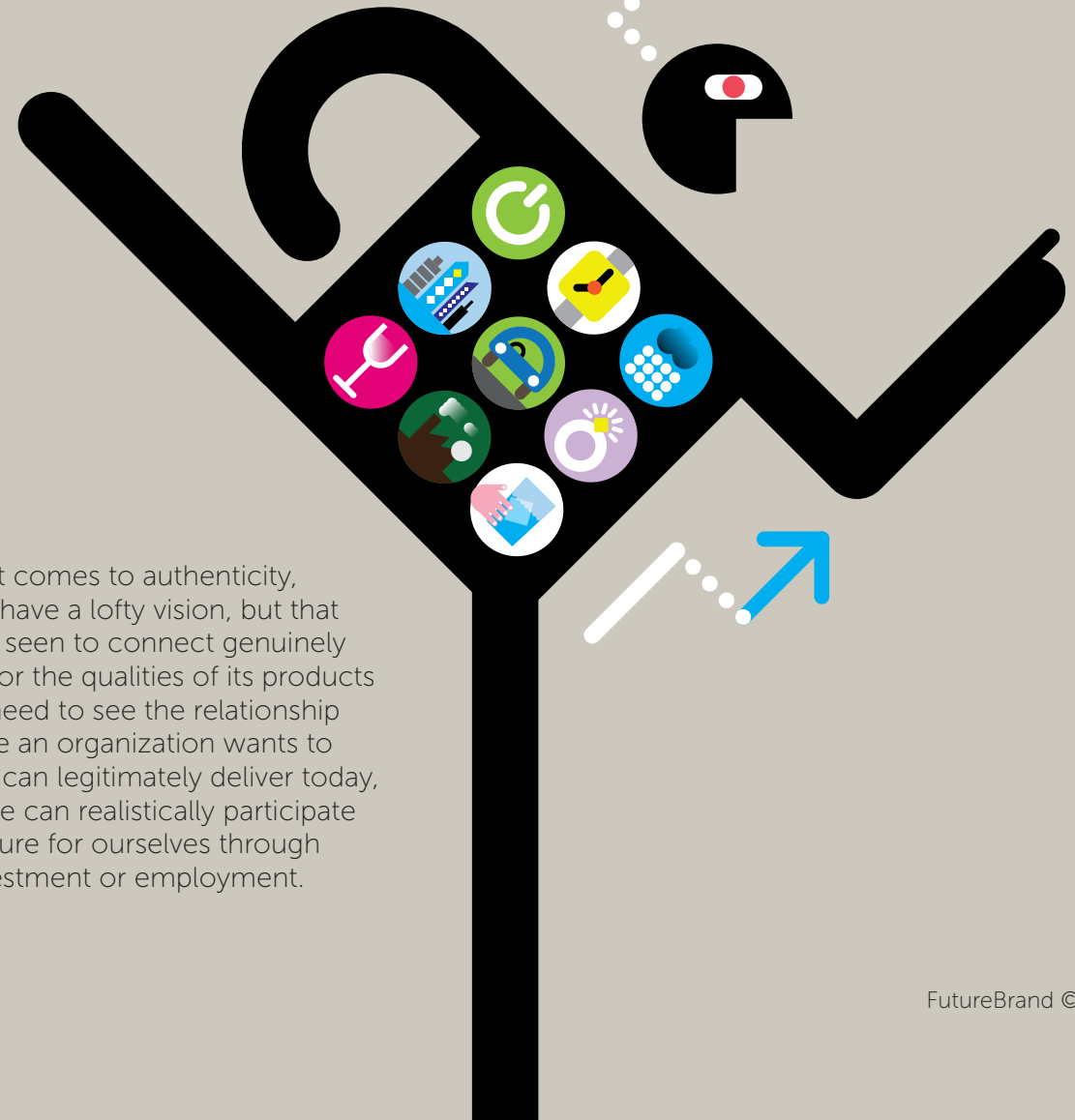
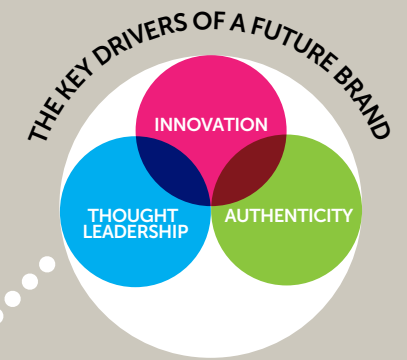


What is a future brand and why does it matter ?

4.3 What are the key drivers of a future brand?

There are a series of key drivers of a 'future brand' – things that stand out as major differentiators between organizations with the strongest and weakest perceptions in our research. These most significantly relate to the attributes of thought leadership, innovation and authenticity – vital attributes of 'purpose'. In our model, organizations with strong perceptions of thought leadership are seen to be driven by clear ideas and unafraid to express clear views about their category, market or the broader world. They take a position and defend it with consistency and evidence. They want to inform what we think and how the world understands what they offer, rather than allowing other people to define it for them. Innovation is best understood as providing new things that are useful. This means the organization is seen to go beyond change or novelty for its own sake, and instead focus on inventing products, services or experiences that are genuinely useful. Being known for this kind of innovation means that an organization focuses on adapting to the changing needs of its customers, consumers or market, rather than incrementally improving against its competition, and has more chance of shaping the future of its category as a result.

And finally, when it comes to authenticity, organizations can have a lofty vision, but that vision needs to be seen to connect genuinely to its primary task or the qualities of its products and services. We need to see the relationship between the future an organization wants to create and what it can legitimately deliver today, not least so that we can realistically participate in creating that future for ourselves through consumption, investment or employment.



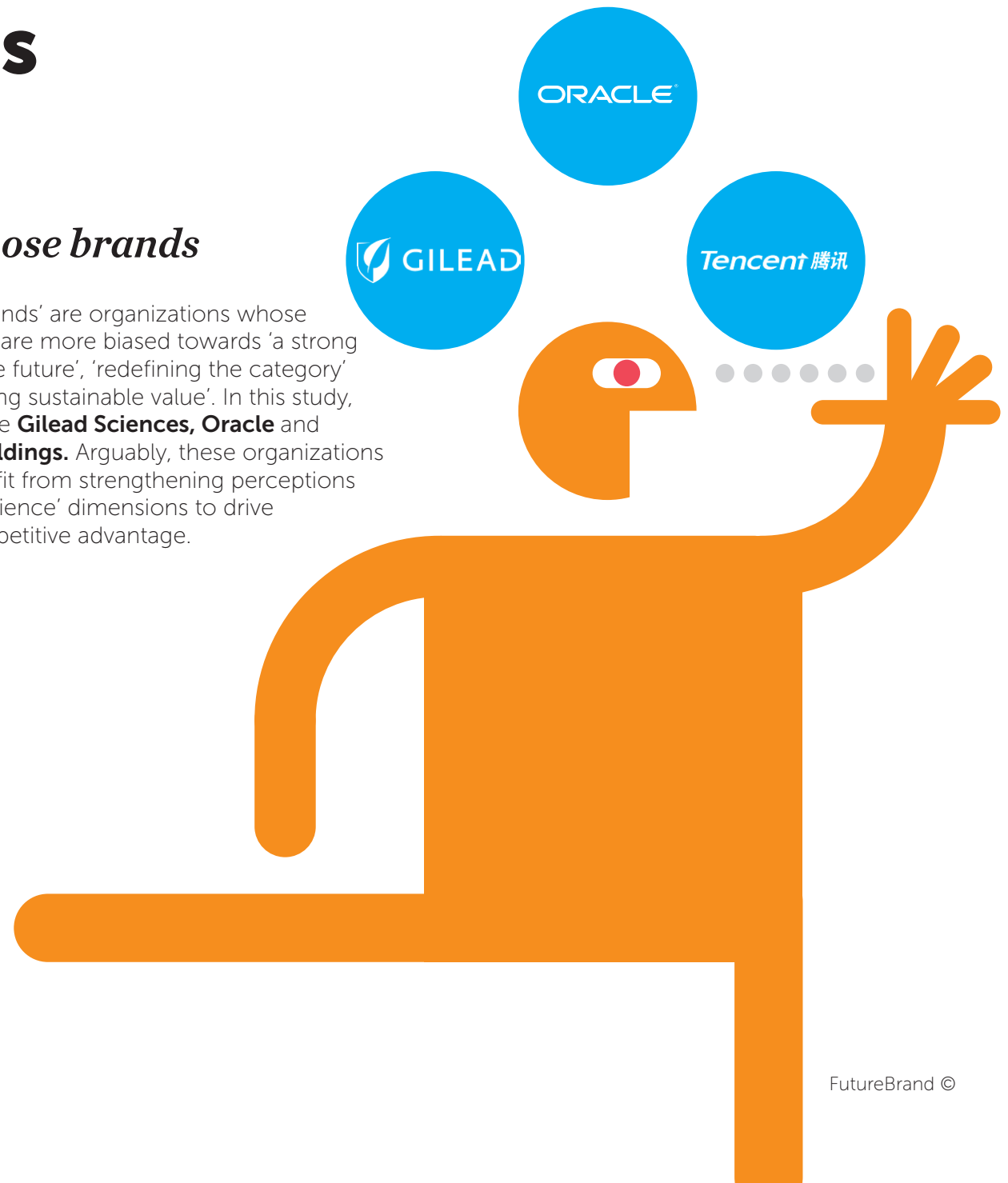
What is a future brand and why does it matter ?

4.4 Our typologies

All of the organizations in the **Global Top 100** are extraordinarily successful by most common measures. However, our findings show that whilst most benefit from strong perceptions in some attributes, they often have opportunities to improve the way they are seen in specific areas. We have three further typologies for those organizations that are not classified as 'future brands', based on their scores and degree of balance of perceptions across the dimensions. This helps organizations to understand what levers to pull for greater success today and in the future.

1. Purpose brands

'Purpose brands' are organizations whose perceptions are more biased towards 'a strong vision for the future', 'redefining the category' and 'delivering sustainable value'. In this study, these include **Gilead Sciences, Oracle** and **Tencent Holdings**. Arguably, these organizations would benefit from strengthening perceptions in the 'experience' dimensions to drive further competitive advantage.

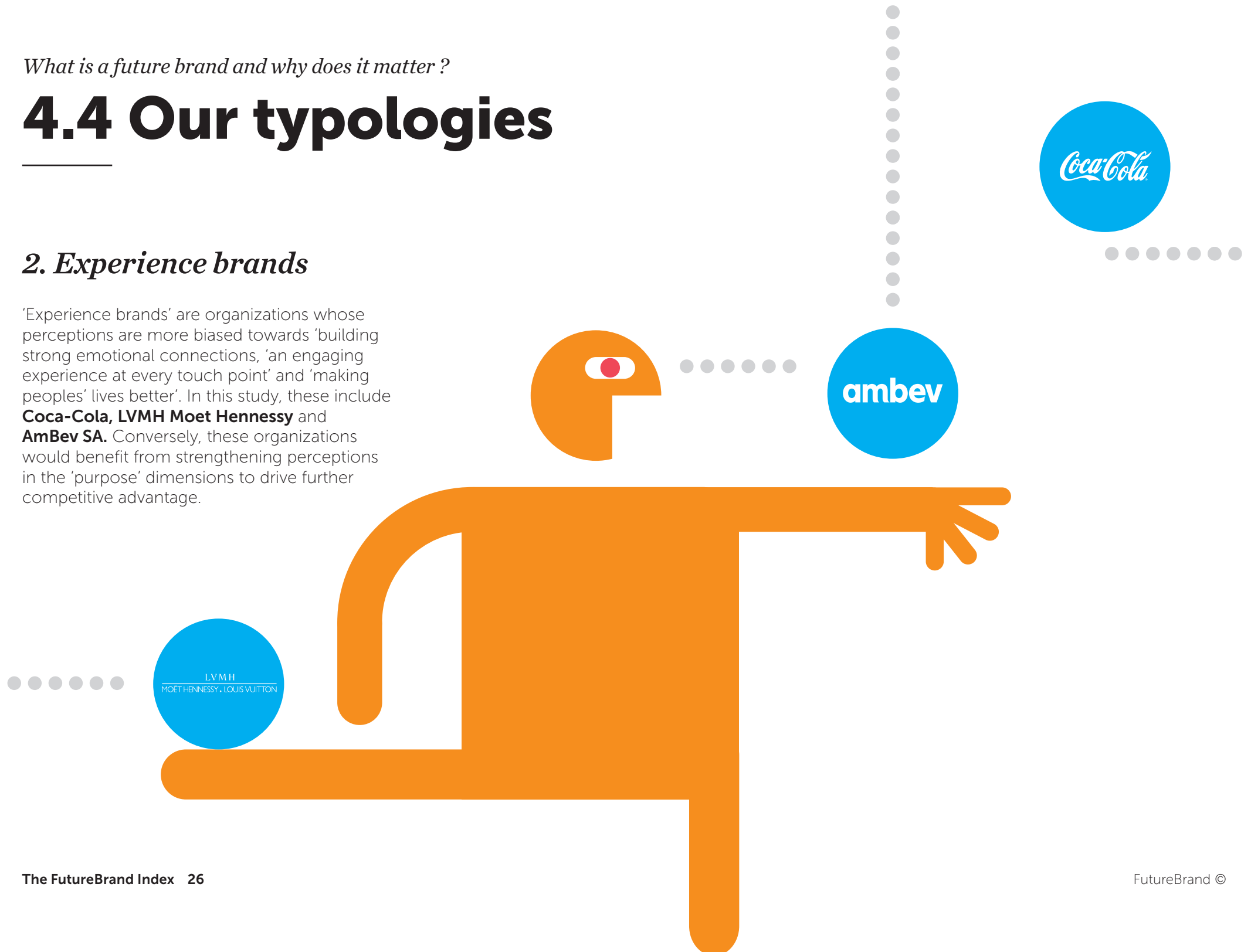


What is a future brand and why does it matter ?

4.4 Our typologies

2. Experience brands

'Experience brands' are organizations whose perceptions are more biased towards 'building strong emotional connections, 'an engaging experience at every touch point' and 'making peoples' lives better'. In this study, these include **Coca-Cola**, **LVMH Moet Hennessy** and **AmBev SA**. Conversely, these organizations would benefit from strengthening perceptions in the 'purpose' dimensions to drive further competitive advantage.



What is a future brand and why does it matter ?

4.4 Our typologies

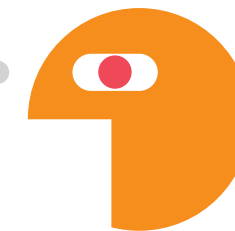
3. Corporate brands

'Corporate brands' are organizations whose perceptions might be more balanced across the dimensions, but are not sufficiently strong to qualify as a 'future brand'. These are divided into two further classifications in this study – those organizations that are 'admired' and those organizations towards which the public feel more indifferent.

'Admired corporate brands' are those closest to the top right of the purpose-experience matrix, and therefore the closest to becoming 'future brands'. These include **Amazon.com, GSK, Berkshire Hathaway, Siemens, Pfizer, Eco Petrol, TSMC, Westpac Banking, Amgen, China Mobile, Bayer, BHP Billiton, ANZ Bank, 3M, Daimler, Walmart, Vodafone, CVS Caremark, Home Depot, PepsiCo, Roche** and **Novartis**.

The remaining organizations are not necessarily seen negatively, although our qualitative data points to sector-specific need for improvement in some areas, but are perhaps felt to be less meaningful or relevant to people. Again, this is not a matter of awareness or negative perceptions, but rather weaker perceptions against the dimensions that drive competitive advantage in our measures.

This can, in some cases, be attributed to particularly weak perceptions in specific attributes. **Comcast**, for example, is in the bottom five in perceptions of 'attachment' and 'story', and **Santander** has its weakest perception in the attribute of 'indispensability'. Whereas some organizations like **BNP Paribas** and **ConocoPhillips** have weak perception scores more consistently across the bottom five of every attribute.



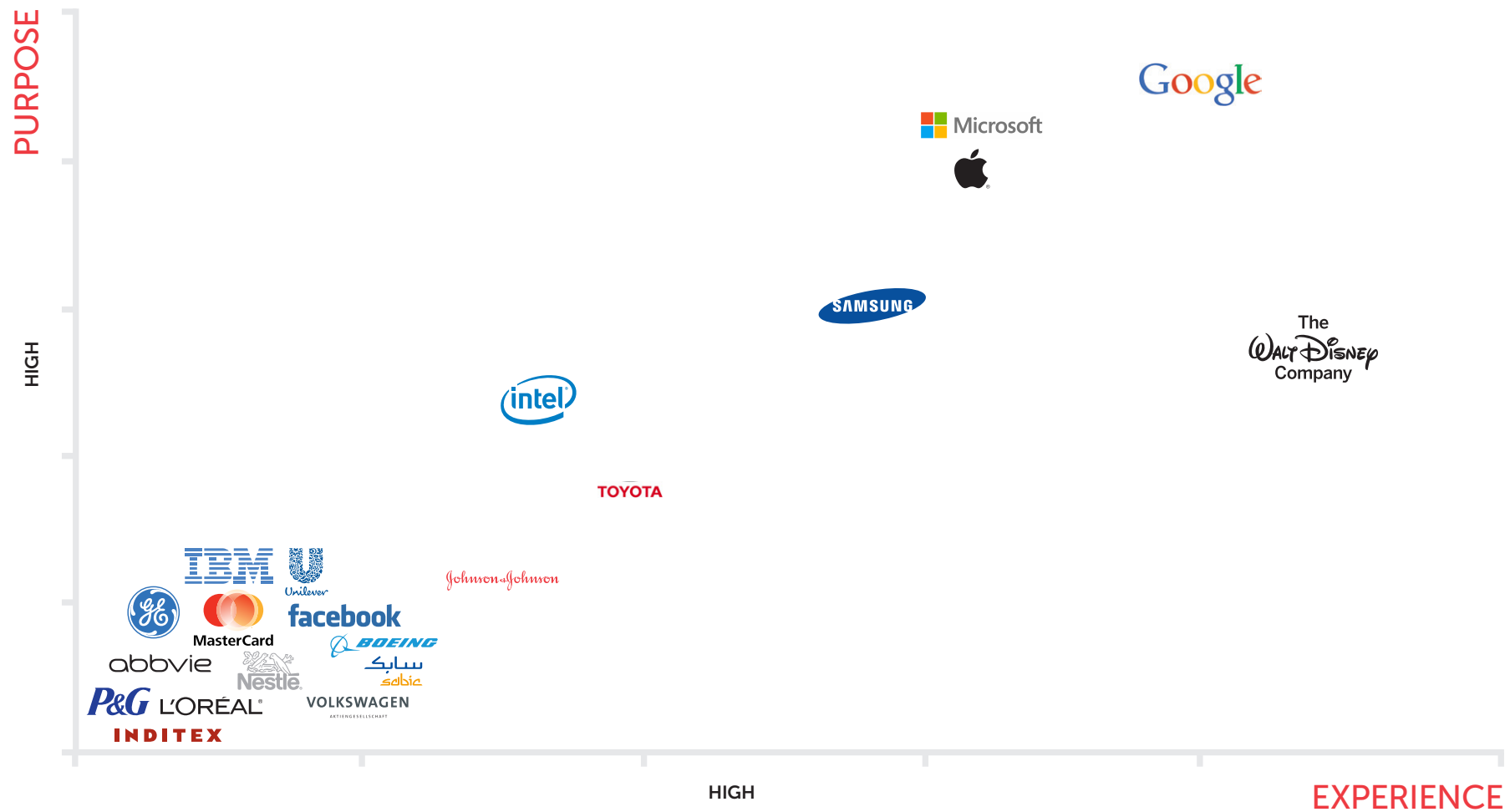
What is a future brand and why does it matter ?

4.5 Which of the top 100 companies are future brands?



What is a future brand and why does it matter ?

4.5 Which of the top 100 companies are future brands?



What is a future brand and why does it matter ?

4.6 The purpose dimension: rankings by attribute

	Authenticity	Inspiration	Innovation	Thought Leadership	Individuality	Indispensability	Resource management	Price premium	Purpose
1		Google				Google	Google	Google	Google
2			Google						
3	Google				Google				
4				Google					
5							abbvie		

	Authenticity	Inspiration	Innovation	Thought Leadership	Individuality	Indispensability	Resource management	Price premium	Purpose
96		ConocoPhillips							
97		COMCAST		COMCAST	COMCAST		ConocoPhillips		
98					ConocoPhillips				ConocoPhillips
99	ConocoPhillips								
100				ConocoPhillips				ConocoPhillips	

What is a future brand and why does it matter ?

4.7 The experience dimension: rankings by attribute

	Wellbeing	Respect	Seamlessness	Personality	Pleasure	People	Consistency	Attachment	Story
1	WALT DISNEY	Google	Google	WALT DISNEY	WALT DISNEY	WALT DISNEY	Google	Google	WALT DISNEY
2	Google	WALT DISNEY	Microsoft	Google	Google	Google	WALT DISNEY	Microsoft	Apple
3	Microsoft	Apple	Apple	Apple	Apple	Microsoft	Microsoft	WALT DISNEY	Microsoft
4	CVS CAREMARK	SAMSUNG	WALT DISNEY	SAMSUNG	SAMSUNG	Apple	Apple	SAMSUNG	Coca-Cola
5	SAMSUNG	Microsoft	SAMSUNG	Coca-Cola	Microsoft	SAMSUNG	SAMSUNG	Apple	Google

	Wellbeing	Respect	Seamlessness	Personality	Pleasure	People	Consistency	Attachment	Story
96	COMCAST	eni	GAZPROM	QUALCOMM	UNION PACIFIC	中國銀行 BANK OF CHINA	中國銀行 BANK OF CHINA	GAZPROM	SANOFI
97	LLOYDS BANK	ConocoPhillips	COMCAST	SANOFI	GAZPROM	UNION PACIFIC	UNION PACIFIC	中國銀行 BANK OF CHINA	中國銀行 BANK OF CHINA
98	ConocoPhillips	BRITISH AMERICAN TOBACCO	ConocoPhillips	中國銀行 BANK OF CHINA	中國銀行 BANK OF CHINA	BNP PARIBAS	ConocoPhillips	PetroChina	BNP PARIBAS
99	ROYAL MAIL	ROYAL MAIL	中國銀行 BANK OF CHINA	UNION PACIFIC	BNP PARIBAS	GAZPROM	BNP PARIBAS	COMCAST	COMCAST
100	BNP PARIBAS	BNP PARIBAS	BNP PARIBAS	ConocoPhillips	ConocoPhillips	ConocoPhillips	PetroChina	ConocoPhillips	ConocoPhillips

Rankings by sector

5.0 Rankings by sector



1

5.1 What drives success by industry sector?

1. Sector leaders, averages and drivers.

In addition to showing the difference between perception and market capitalization across the entire Top 100 Global Companies, our data provides industry-specific insights, including organizational rankings and drivers by sector as determined by our informed global public.

Rankings by sector:

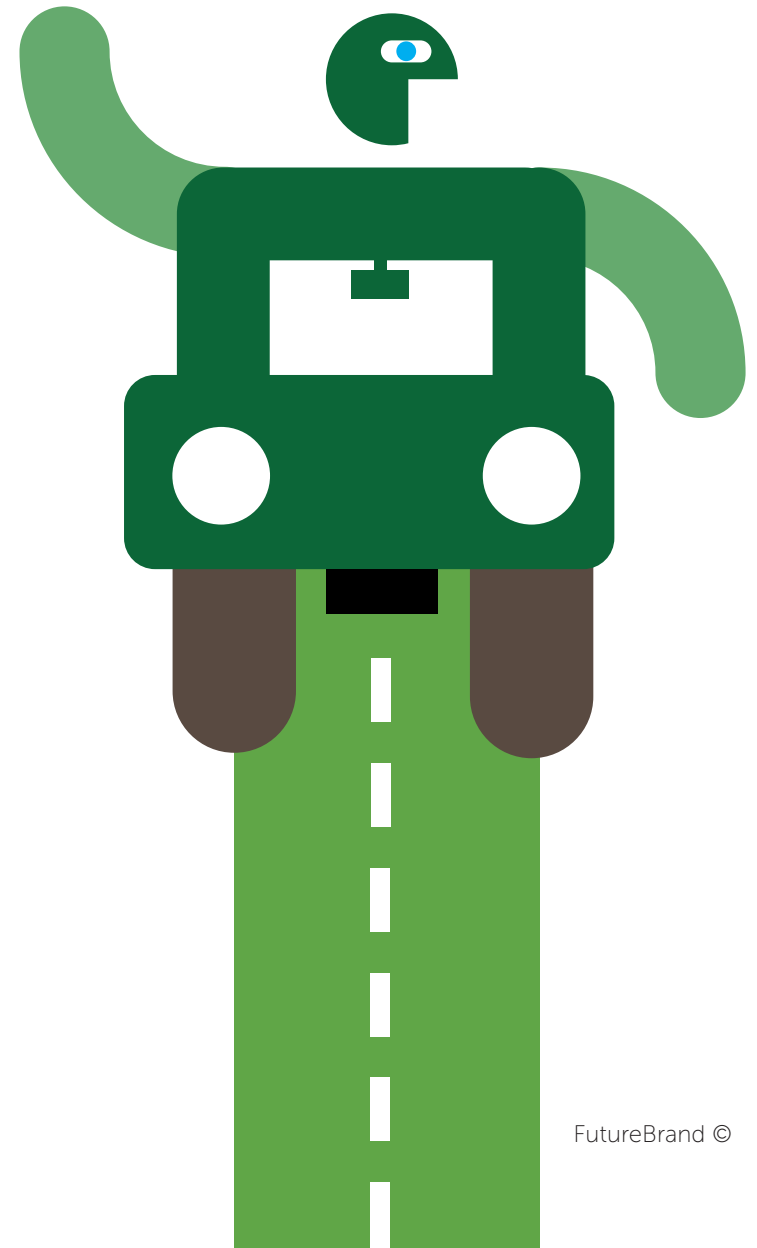
The sector rankings show the relative performance of organizations grouped by super-sector only.

Radar maps:

The radar maps highlight the perceived strengths and weaknesses of each sector by each of our 18 attributes and an indication of the purpose-experience balance in each case. The maps also offer a comparison of these strengths and weaknesses of perception between the sector leader and the sector average.

Sector drivers & organization sentiment:

In each case, we summarise the most important drivers of each sector according to the informed general public, expressed as what companies in the sector will need to do to meet their future expectations. We also capture specific quotations from respondents in relation to the top ranked organization.



Technology

Sector strengths by attribute:

- + ● • Purpose
- • Price premium
- • Indispensability
- • Innovation
- • Pleasure
- • Consistency

Sector weaknesses by attribute:

- ● • Resource Management
- • Seamlessness
- • Wellbeing
- • Respect

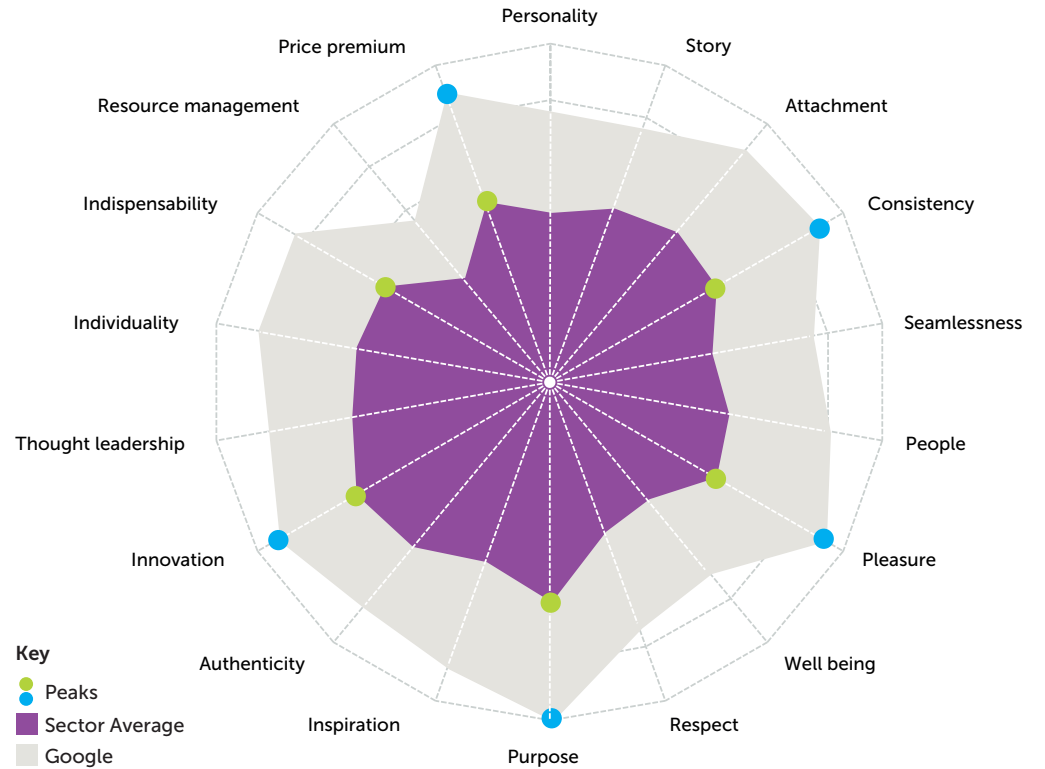
Consumer-defined sector drivers for the future

➔

- Simplicity
- Pleasure
- Innovation
- Indispensability

Brand		FBI Ranking	Difference	Market Cap Ranking*
Google	Google	1	↑ 2	3
Microsoft	Microsoft	2	↑ 2	4
Apple Inc.	Apple Inc.	4	↓ 3	1
Intel	Intel	6	↑ 43	49
IBM	IBM	10	↑ 14	24
Facebook	Facebook	11	↑ 18	29
Mastercard	Mastercard	16	↑ 67	83
Tencent 腾讯	Tencent Holdings	28	↑ 10	38
SAP	SAP	44	↑ 29	73
Cisco Systems	Cisco Systems	61	↓ 2	59
Qualcomm	Qualcomm	87	↓ 40	47

* Source: PwC Global Top 100 Companies by Market Capitalisation 2014



Rankings by sector

Technology

RELIABLE MOTIVATED CONTINUOUS BEST WORLD VISION EMPLOYEES USERS
 THINK KNOW MEANS LEADS IDEAS
INNOVATIVE
 PEOPLE SERVICES
 GLOBAL IDEAS NEEDS **FUTURE** TIME
 DEVELOPING LEADERS COMPANY SERVICE POTENTIAL WAY
 SEARCH MARKET EXCELLENT WORLDWIDE GROWING CONNECTIVITY INCEPTION USERS
BRAND TECHNOLOGY BIGGER
 IMPROVING **NEW RECORD** **FAST**
 ENGINE PRODUCTS POTENTIAL

"Everyone uses it."
 Germany, consumer



"It is a company that cares about employees and makes them feel motivated to give 100%."
 Turkey, consumer

"From its inception it has not stopped improving its overall day-to-day services, it gives solutions to people."
 Argentina, consumer

"It is a company with foresight, it is reliable and very useful in everyday lives."
 USA, consumer

Rankings by sector

Consumer services

Sector strengths by attribute:

- + • Purpose
- Authenticity
- Innovation
- Consistency
- Pleasure

Sector weaknesses by attribute:

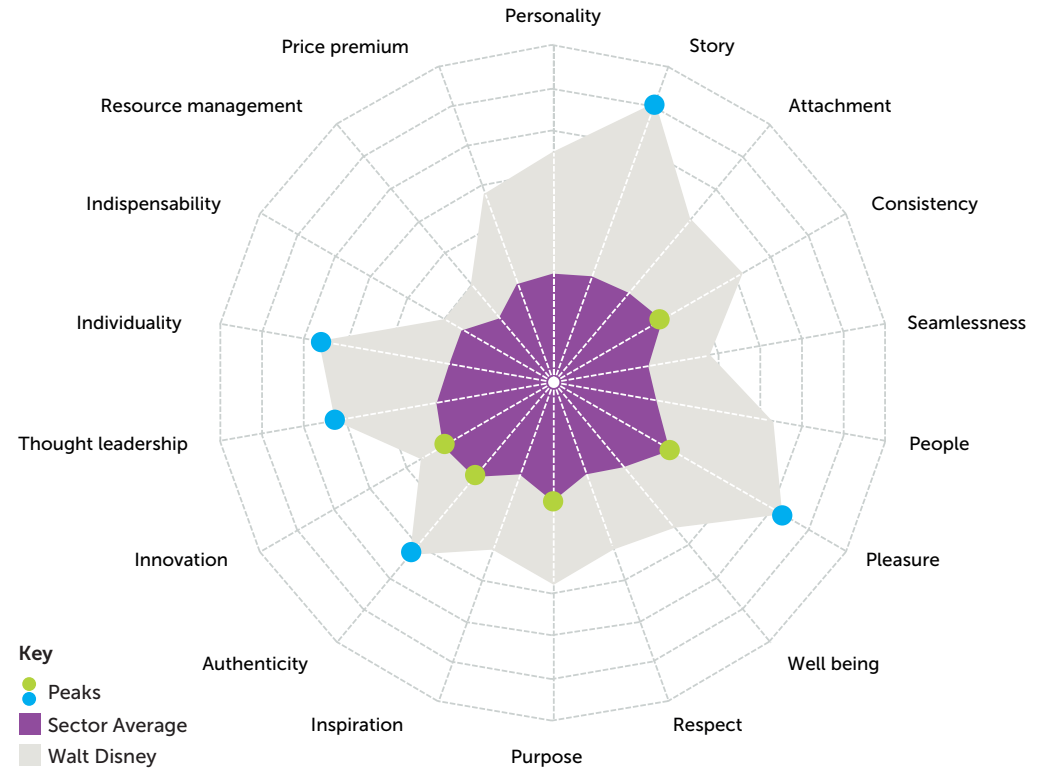
- • Resource Management
- Indispensability
- Innovation
- Seamlessness

Consumer-defined sector drivers for the future

- ➔ • Convenience
- Pleasure
- Entertainment
- Understand audiences • lifestyles

Brand	FBI Ranking	Difference	Market Cap Ranking*
Walt Disney	3	↑ 37	40
Amazon	30	↑ 4	34
Walmart	39	↓ 28	11
Home Depot	46	↑ 10	56
CVS Caremark	49	↑ 44	93
McDonalds	51	↑ 27	78
Comcast	96	↓ 52	44

* Source: PwC Global Top 100 Companies by Market Capitalisation 2014



Rankings by sector

Consumer Services

FAMILY CHILDREN FUN STRONG EMPIRE
ENTERTAINMENT BEST INNOVATIVE SOCIO
 POPULARITY MULTINATIONAL FILMS CUSTOMER GOOD
 WALT DREAMS DIFFERENT EXPERIENCE CHANGES
 PERMANENT INTRODUCING SELLING GOOD DISNEY
 CREATES EMPLOYEES WORK ENTRY
 HUGE BROAD LEVELS VISIONARY CULTURES AWARENESS ADOLESCENTS
 PRODUCTS THINKING PROVIDES MAKE ADAPTS DAY

"People will always need entertainment."
 Canada, consumer

The
WALT DISNEY
 Company

Relative perception strengths + weaknesses



Story
 Individuality
 Pleasure
 Authenticity
 Thought Leadership



Resource Management
 Innovation
 Indispensability
 Seamlessness

Comparison to sector average

Walt Disney enjoys stronger perceptions across all attributes, with the biggest difference in the story attribute.

"It is constantly innovating, dreaming, and giving happiness to people."

USA, consumer

"It's a company that dedicates itself to family entertainment, particularly children and adolescents. It covers interests of all ages, cultures and socio-economic levels."

Germany, consumer

"It is always adapting to offer better services and products."
 India, consumer

Rankings by sector

Healthcare

Sector strengths by attribute:

- + • Indispensability
- Innovation
- Attachment
- Consistency
- Wellbeing

Sector weaknesses by attribute:

- • Resource management
- Personality
- Story
- Seamlessness
- Pleasure

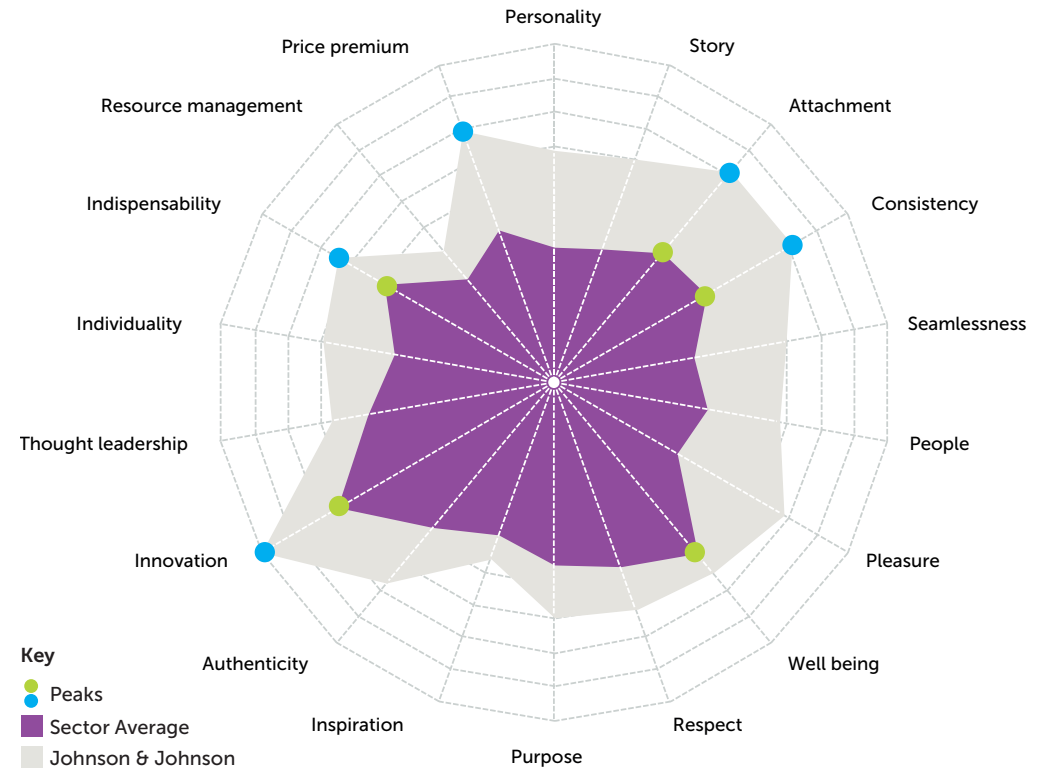
Consumer-defined sector drivers for the future

➔

- Adapting to an increasing target audience
- Scientific innovation
- Wellbeing

Brand	FBI Ranking	Difference	Market Cap Ranking*
Johnson & Johnson	8	↓ 1	7
Gilead Sciences	19	↑ 27	46
Abbvie Inc.	20	↑ 80	100
GlaxoSmithKline	26	↑ 17	43
Pfizer	31	↓ 12	19
Amgen	43	↑ 37	80
Roche	50	↓ 44	6
Merck	70	↓ 37	33
Sanofi	73	↓ 32	41
Bristol-Myers Squibb	64	↑ 25	89

*Source: PwC Global Top 100 Companies by Market Capitalisation 2014

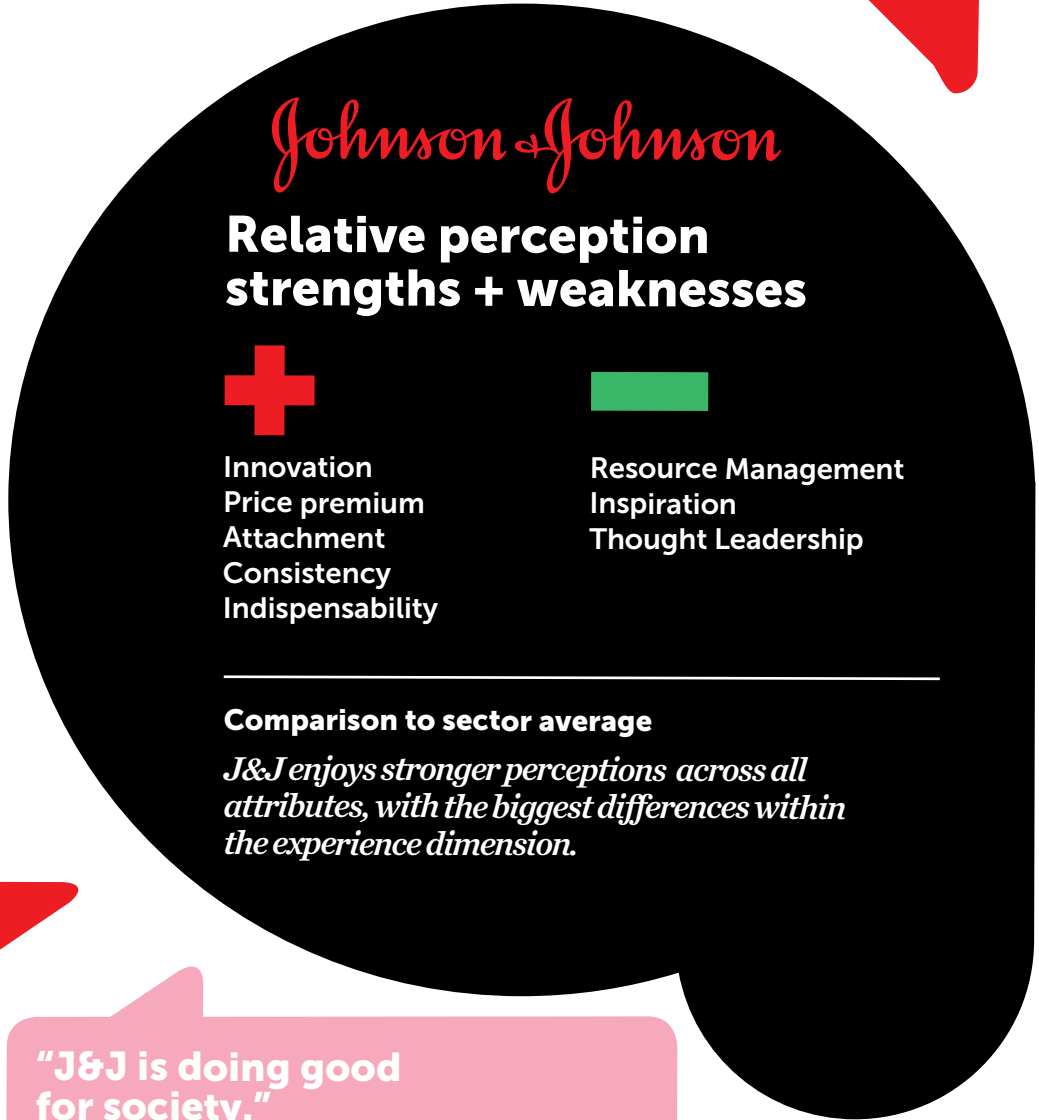


Rankings by sector

Healthcare



"They offer a variety of quality products and continuously innovate."
Japan, consumer



"It's a reliable company, with high quality and respect for the consumer."
Brazil, consumer

"They are innovative, always have brilliant ideas and feedback from consumers, have high ethics and believe that looking after the people is priority number one."
S.Africa, consumer

"J&J is doing good for society."
Australia, consumer

Rankings by sector

Consumer Goods

Sector strengths by attribute:

- + ● Purpose
- Authenticity
- Innovation
- Thought leadership
- Pleasure
- Story
- Consistency

Sector weaknesses by attribute:

- ● Resource Management
- Inspiration
- Wellbeing
- Respect
- Seamlessness
- People

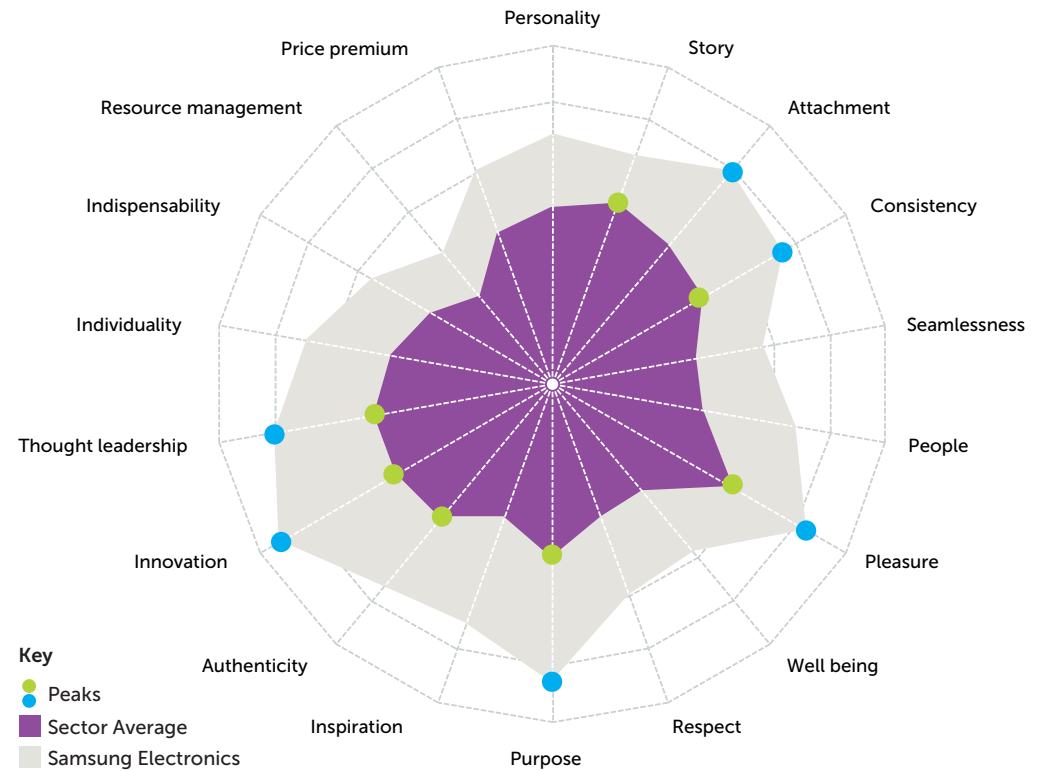
Consumer-defined sector drivers for the future

➔

- Increasing variety of goods
- Product quality improvement
- Pleasure

Brand		FBI Ranking	Difference	Market Cap Ranking*
Samsung Electronics		5	↑ 13	18
Toyota		7	↑ 14	21
Unilever		9	↑ 43	52
Nestle		15	↓ 5	10
Volkswagen		17	↑ 36	53
L'Oreal		21	↑ 50	71
Coca Cola		22	↑ 10	32
Procter & Gamble		23	↓ 6	17
AmBev SA		27	↑ 31	58
Daimler		36	↑ 36	72
PepsiCo		47	↑ 3	50
Anheuser- Busch InBev		66	↓ 35	31
British American Tobacco		91	↓ 23	68
Philip Morris		94	↓ 49	45

*Source: PwC Global Top 100 Companies by Market Capitalisation 2014



Rankings by sector

Consumer Goods

DEVELOPMENT MARKET TIME TRENDS
 COMPANY FUTURE
 PRODUCE CONTINUING LEADING CUSTOMER FAST
 TECHNOLOGY CONTINUING
 BRAND POPULAR
 ELETRONICS FOREFRONT QUALITY GENERAL SATISFYING
 GOOD MARKET
 FUTURE FUNCTIONS ASSOCIATED
 PRODUCTS POPULAR FAST SEEKING FUNCTIONS
 LARGE

"Because it is expanding and diversifying its product lines. I see that it has an enormous future."
 Argentina, consumer

SAMSUNG

Relative perception strengths + weaknesses



Innovation
 Attachment
 Thought Leadership
 Individuality



Resource management
 Inspiration
 Thought Leadership

Comparison to sector average

Samsung enjoys stronger perceptions across all attributes, with the biggest differences in the innovation and purpose attributes.

"It is a company that is setting trends more than anyone else in the area of mobile phones."

France, Consumer

"It is one of the best companies that searches for all ways to provide satisfaction, as well as to provide for the well-being of the customer."

UAE, consumer

"Always moving forward."

UK, consumer

Rankings by sector

Industrials

Sector strengths by attribute:

- + • Innovation
- Thought leadership
- Authenticity
- People
- Attachment

Sector weaknesses by attribute:

- • Resource Management
- Inspiration
- Seamlessness
- Personality

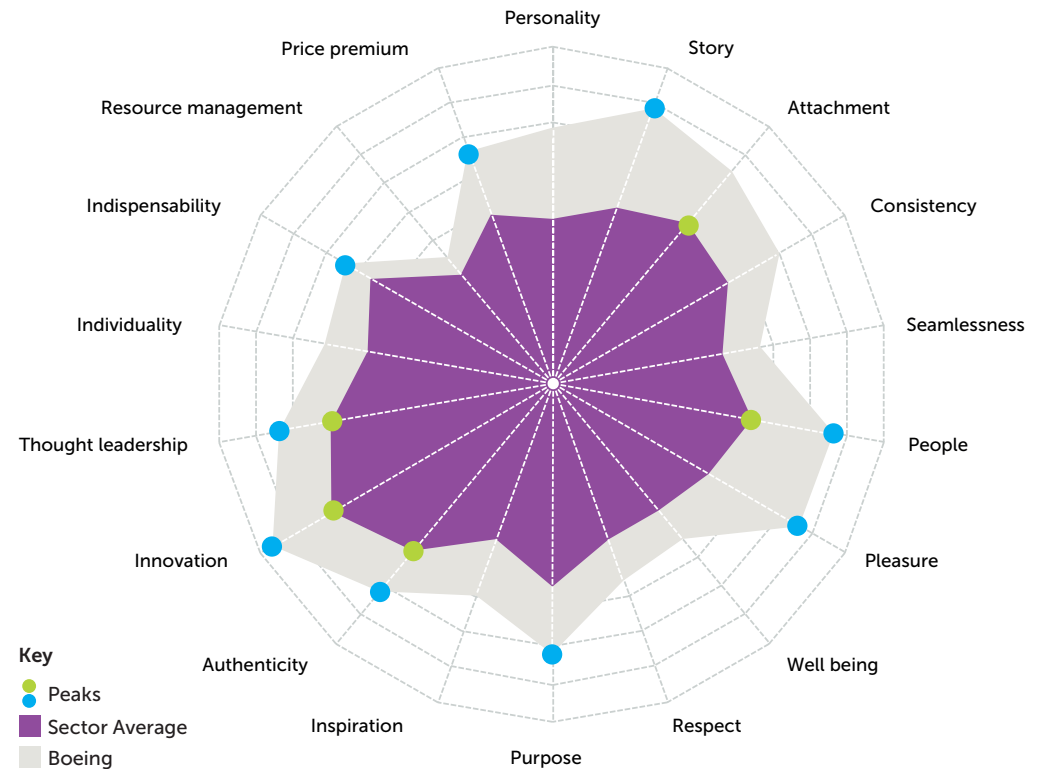
Consumer-defined sector drivers for the future

➔

- Advanced technology
- Expertise
- Pleasure
- Innovation

Brand	FBI Ranking	Difference	Market Cap Ranking*
Boeing	12	↑ 64	76
General Electric	18	↓ 10	8
Siemens	29	↑ 25	54
3M	40	↑ 48	88
UPS	52	↑ 38	90
United Technologies	53	↑ 10	63
Union Pacific	95	↑ 3	98

* Source: PwC Global Top 100 Companies by Market Capitalisation 2014

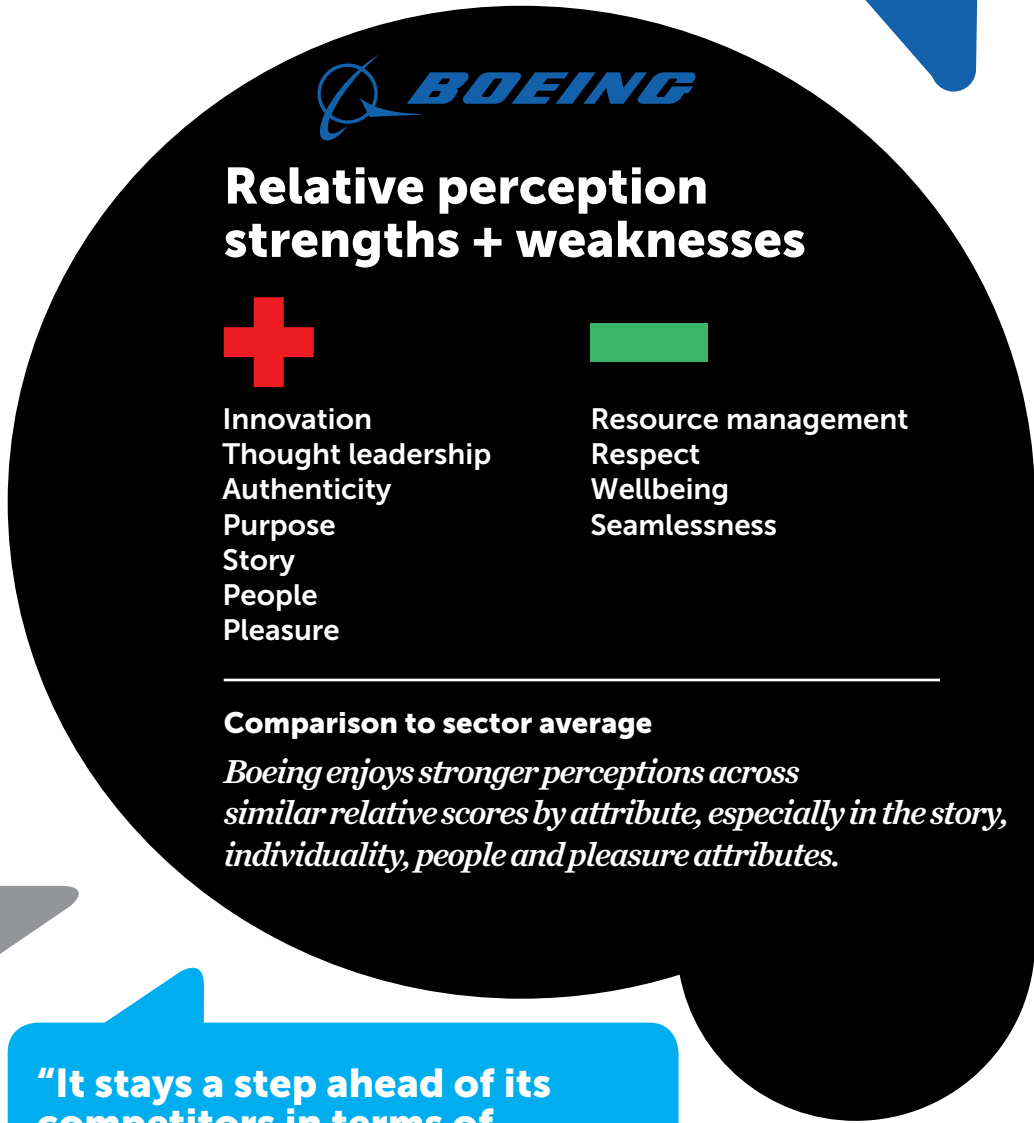


Rankings by sector

Industrials



"It is a great, robust company."
Thailand, consumer



"They are on the cutting edge of technology."
Canada, consumer

"It will dominate the aeronautics market of this century, given their capacity for development and production."
Russia, consumer

"It stays a step ahead of its competitors in terms of technology."
Turkey, consumer

Rankings by sector

Oil & Gas

Sector strengths by attribute:

- + Innovation
- Purpose
- Authenticity
- Indispensability
- Story

Sector weaknesses by attribute:

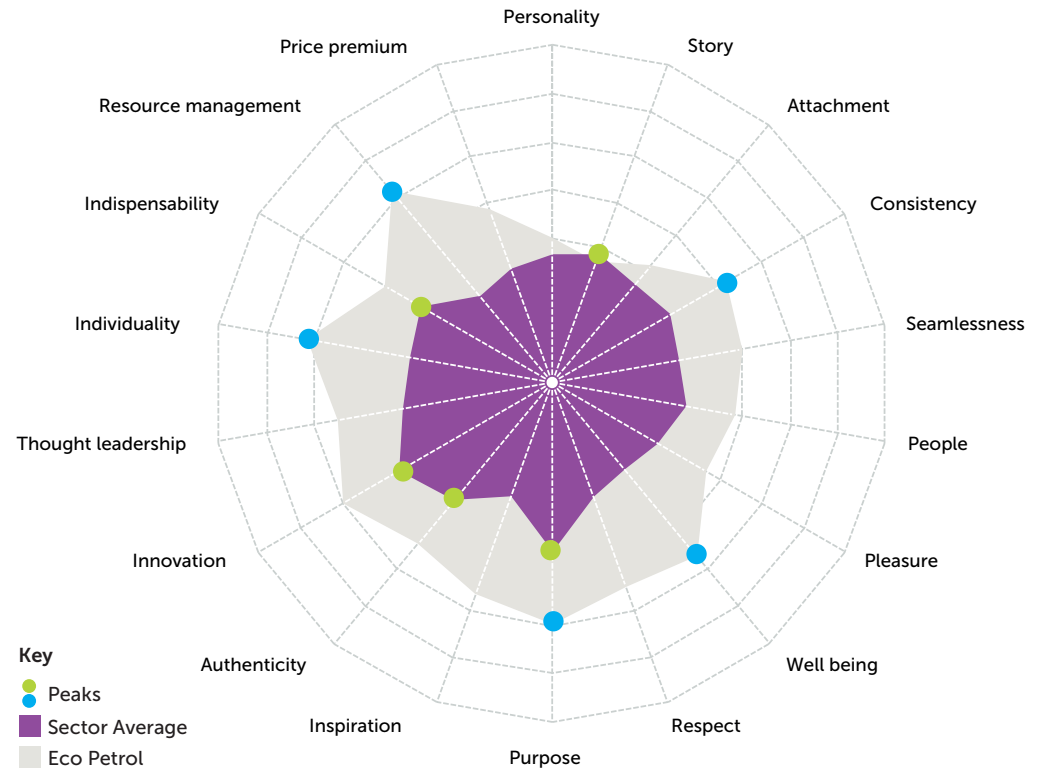
- Resource Management
- Inspiration
- Price premium
- Wellbeing

Consumer-defined sector drivers for the future

- ➔ Sustainability
- ➔ New resources research
- ➔ Community care

Brand	FBI Ranking	Difference	Market Cap Ranking*
Eco Petrol	38	↑ 57	95
Royal Dutch Shell	55	↓ 43	12
Petro Brasillerio Petrobas	60	↑ 30	90
Total	62	↓ 25	37
Chevron	76	↓ 61	15
China Petroleum	77	↓ 7	70
Statoil	82	↑ 12	94
Petro China	92	↓ 79	13
ENI	93	↓ 1	92
Gazprom	97	↓ 13	84
ConocoPhillips	99	--	99

*Source: PwC Global Top 100 Companies by Market Capitalisation 2014



Rankings by sector

Oil & Gas



"An outstanding and efficient company."
China, consumer



"Because it is geared toward better control of the ecosystem."
Brazil, consumer

"It is a company with an ecological conscience that aims for the necessities for the future global population."
Mexico, consumer

"Green energy is increasingly important. We live in a 'green' age."
USA, consumer

Rankings by sector

Basic Materials

Sector strengths by attribute:

- + • Thought leadership
- Innovation
- Purpose
- • Story
- Attachment
- Wellbeing

Sector weaknesses by attribute:

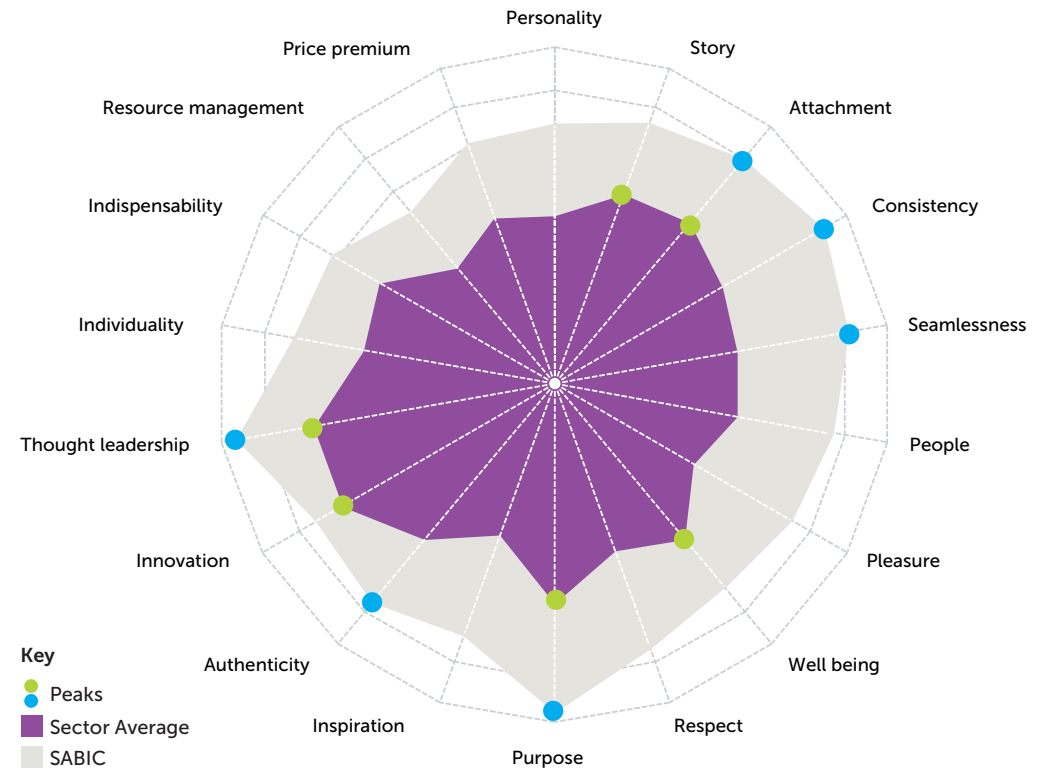
- • Resource Management

Consumer-defined sector drivers for the future

- ➔ • Trust
- Environmental protection
- Diverse range of quality products

Brand	FBI Ranking	Difference	Market Cap Ranking*
SABIC	13	↑ 72	85
Bayer	35	↑ 20	55
BHP Billiton	42	↓ 16	26
Rio Tinto	86	↓ 24	62
BASF	90	↓ 26	64

* Source: PwC Global Top 100 Companies by Market Capitalisation 2014



Rankings by sector

Basic Materials



"Its creativity, through its excellence in service."
Argentina, consumer



"They provide excellent services and they rapidly grow."
India, consumer

"It is a deeply-rooted company, and it relies on credibility, its strong capital and quality of service."
UAE, consumer

"They have many resources and a good vision for the future."
Mexico, consumer

Rankings by sector

Financials

Sector strengths by attribute:

- + ● • Indispensability
- • Thought Leadership
- • Authenticity
- • Purpose
- • Attachment
- • People

Sector weaknesses by attribute:

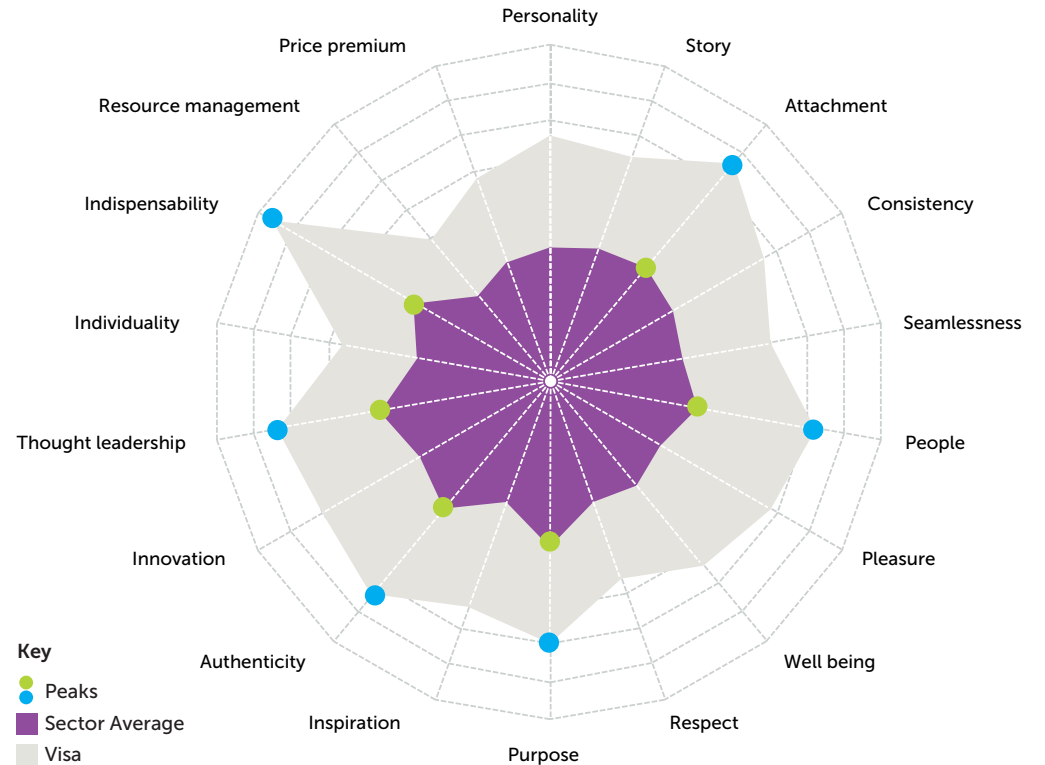
- ● • Resource Management
- • Pleasure
- • Respect

Consumer-defined sector drivers for the future

➔

- Iconic leadership
- Ethics
- Innovation
- Creating confidence

Brand		FBI Ranking	Difference	Market Cap Ranking*
	Visa	14	↑ 28	42
	Berkshire & Hathaway	32	↓ 27	5
	Westpac Banking	33	↑ 48	81
	ANZ Bank	41	↑ 55	96
	China Construction Bank	56	↓ 26	30
	Allied Irish Banks	58	↑ 9	67
	American Express	63	↑ 12	75
	Citi Group	65	↓ 26	39
	HSBC	68	↓ 48	20
	Bank of America	71	↓ 43	28
	Toronto Dominion Bank	75	↑ 22	97
	Industrial Commercial Bank of China	78	↓ 55	23
	Banco Santander	79	↓ 13	66
	Agricultural Bank of China	80	↓ 32	48
	Wells Fargo	81	↓ 72	9
	JP Morgan Chase & Co	83	↓ 67	16
	Commonwealth Bank	84	↓ 23	61
	Royal Bank of Canada	85	↓ 6	79
	Lloyds Banking Group	88	↓ 14	74
	Bank of China	98	↓ 41	57
	BNP Paribas SA	100	↓ 31	69



* Source: PwC Global Top 100 Companies by Market Capitalisation 2014

Rankings by sector

Financials

PEOPLE GLOBALY GRANTS BANK SOCIETY
 COMANY FINANCES USE
 SERVICES ECONOMIC RECEIVING NEEDED CONSIDER
 GOOD NEGOTIATIONS SATISFIED REPUTATION
 NEGOTIATIONS PERSONALITY GRANTS OPENS
 CONSIDER RECEIVING CASHLESS LOT BANK COMPARED
 CUSTOMERS

"People use them constantly."
 Australia, consumer

VISA

Relative perception strengths + weaknesses



Indispensability
 Thought Leadership
 Authenticity
 Purpose
 Attachment
 People



Resource management
 Respect

Comparison to sector average

*Visa enjoys stronger perceptions in all attributes.
 The biggest difference is in the indispensability attribute.*

"It has increased the amount of customers."

Brazil, consumer

"We move further towards a cashless society and Visa provides security for transactions."

USA, consumer

"Experience, performance, potential, projection capability."

Argentina, consumer

Rankings by sector

Telecommunications

Sector strengths by attribute:

- + • Thought leadership
- Innovation
- Purpose
- Consistency

Sector weaknesses by attribute:

- • Resource Management
- Seamlessness
- Story

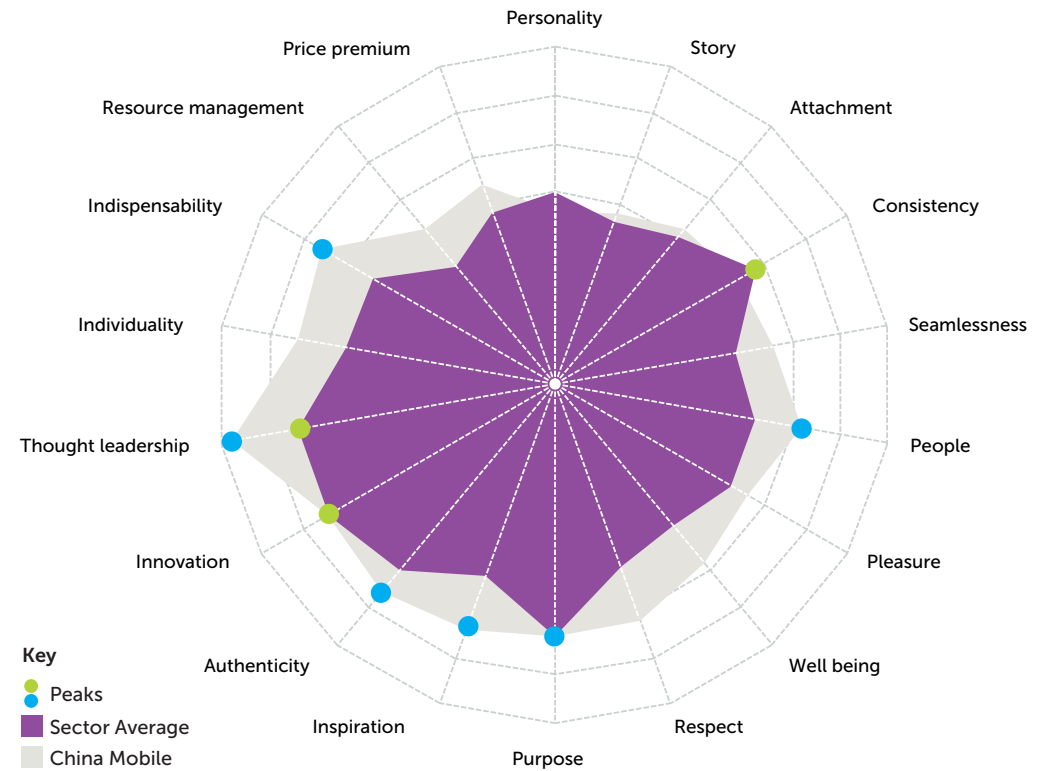
Consumer-defined sector drivers for the future

➔

- Technological innovation
- Broaden consumer appeal
- Indispensability

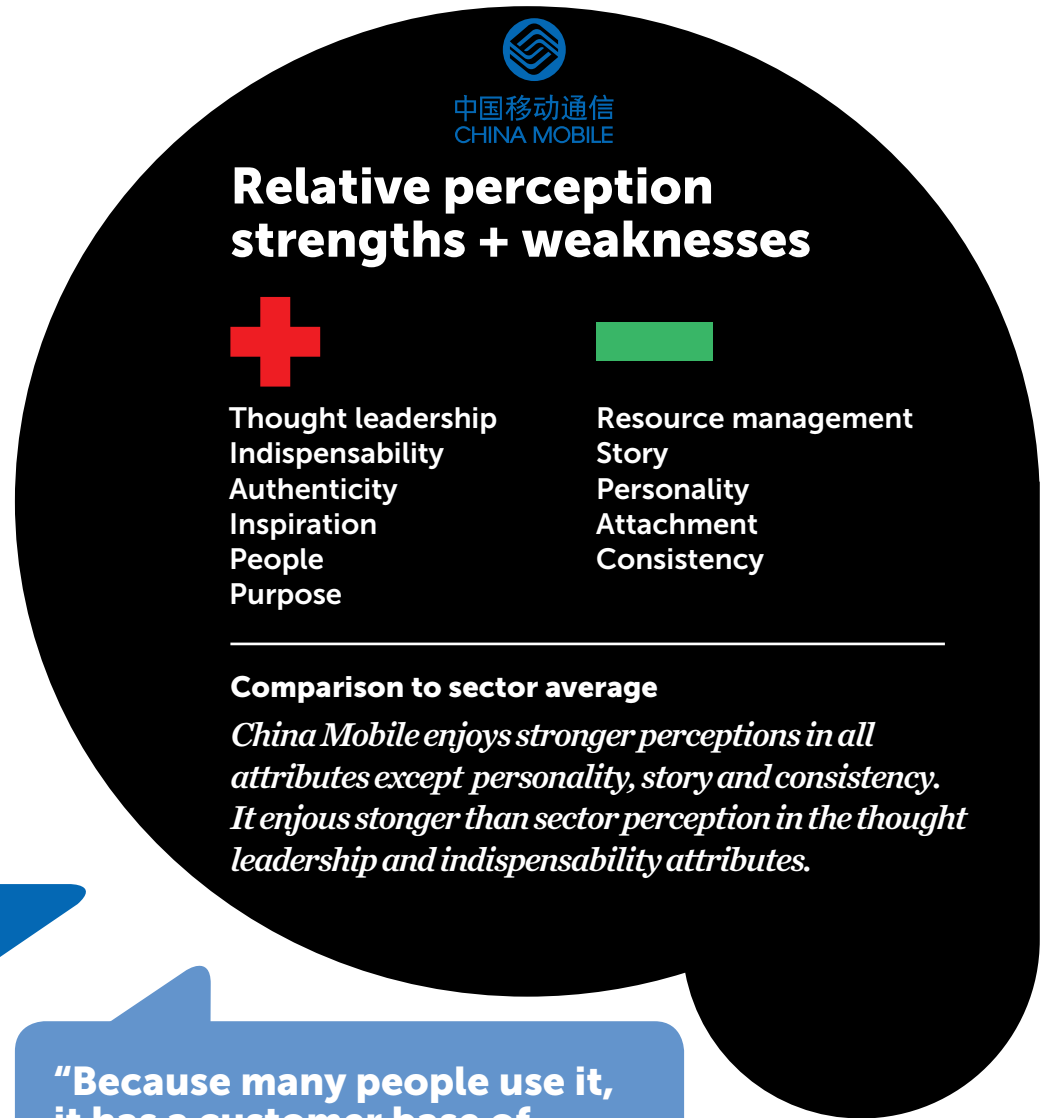
Brand	FBI Ranking	Difference	Market Cap Ranking*
China Mobile	45	↓ 20	25
Vodafone	48	↑ 12	60
Verizon	57	↓ 35	22
AT&T	69	↓ 34	35
SoftBank Corp	72	↑ 14	86

* Source: PwC Global Top 100 Companies by Market Capitalisation 2014



Telecommunications

SECTOR ADVANCED THINK
LEADING LEADING DELIVERING
INDISPENSIBLE GROWTH
COMMUNICATION ORDER
CHINA TECHNOLOGY
GROWTH PEOPLE
THINK PROGRESS FUTURE
COMPETITIVENESS WIDE DELIVERING
TECHNOLOGY INNOVATION EMPLOYMENT
EDGE



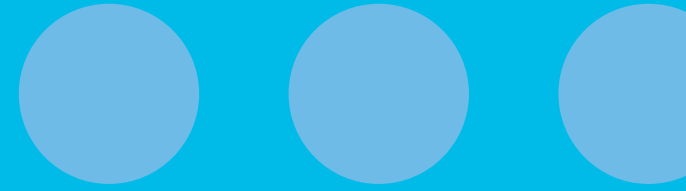
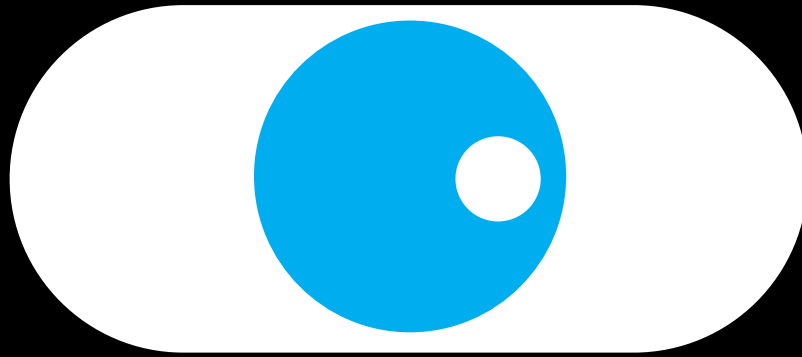
"Because they have the most advanced cutting edge technology."
Mexico, consumer

"It is new-leading company in communication industry.They are taking the lead in technology and prices"
Australia, consumer









"Because many people use it, it has a customer base of 700 million."
Japan, consumer

The ones to watch

6.0 The ones to watch



6.1 The ones to watch

Brand	Future Ranking	FB/ CB/ PB	Global 100 Position	Sector
 Pfizer	1	CB	31	Healthcare
 ICBC	2	CB	78	Financials
 Tencent 腾讯	3	PB	28	Technology
 United Technologies	4	CB	53	Industrials
 amazon	5	CB	30	Consumer Services
 ORACLE	6	PB	34	Technology
 gsk	7	CB	26	Healthcare
 IBM	8	CB	37	Technology

One of the key data points in our analysis was respondent perception of how far organizations are 'moving forwards' today and in the future. When we analyzed those organizations most likely to be moving forwards in three years' time, excluding those already classified as 'future brands', eight companies performed most strongly.

If we consider perception of latent potential and momentum as indicators of future success, we think these eight organizations are 'ones to watch' over the next three to five years and have the opportunity to improve both their FutureBrand Index and market capitalization ranking. Strong perception of the potential of these specific organizations also reinforces broader global indicators that the technology sector will continue to thrive and generate value, in keeping with the on-going technology-driven transformation of our commercial and personal lives – from ubiquitous online retail driven by companies like Amazon.com to the invisible yet vital semiconductor products that power modern life provided by TSMC, and software companies like

Oracle who are at the forefront of making sense of our relationship with data for the 21st century. Couple this with a globally ageing population, a preoccupation with personal health and rising middle class discretionary income, and it is perhaps no surprise to see people emphasize the role pharmaceutical organizations will have in improving our future. This echoes the strong performance of life science organizations like Abbvie and Gilead Sciences in the top 20 of our rankings. Finally, whilst Chinese organizations might not yet be 'future proof' as a function of limited global reach or weaker understanding, two of the 'ones to watch' are Chinese market leaders, suggesting that the full impact of north Asian organizations across sectors has yet to reveal itself.

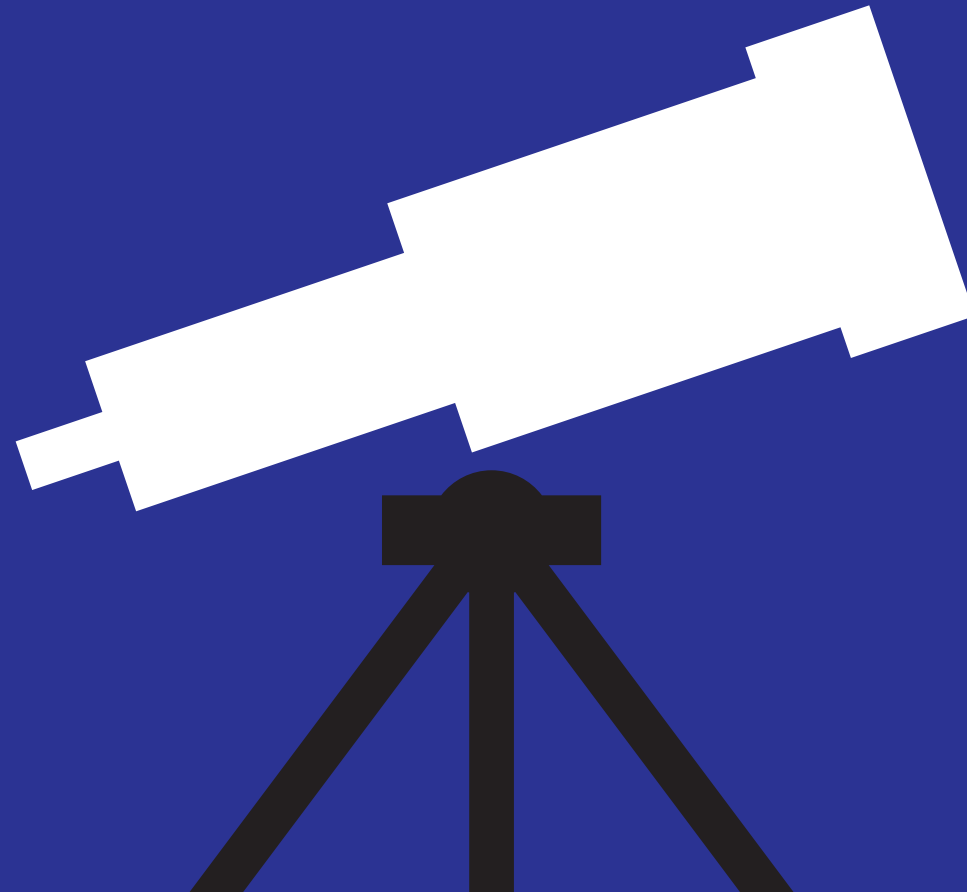
The ones to watch

6.2 Future Drivers

There are three dominant future drivers emerging from our research into public perception of the Top 100 Global Companies.

1. Technology, consumer facing and entertainment companies will continue to dominate.

The first and most obvious is that technology, consumer facing and entertainment companies will continue to dominate public perception and the capital markets. This is underscored by the parity of performance of these organizations at the top of the market capitalization and FutureBrand Index rankings. The smaller the gap between public perception across purpose and experience and financial value today indicates that these organizations are not just strong commercial performers now, and benefit from advantages like purchase preference, price premium and employer appeal, but that they are also more 'future proof' by our measures.

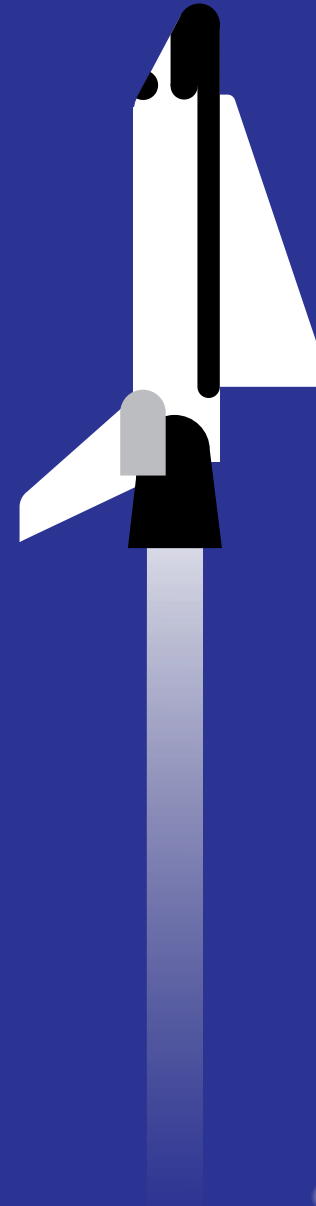


The ones to watch

6.2 Future Drivers

2. Ethics will be a vital differentiator for Financial, Oil & Gas and Energy organizations.

The second, and this reinforces challenges already known to the sectors, is that ethical business practices will be a vital differentiator for Financial, Oil & Gas and Energy organizations. Those companies that can demonstrate they are leading change in their industry in relation to obvious areas like the environment and corporate social responsibility, will not only better attend to stakeholder needs, but also will differentiate from their competition. This is not least because the sectors still seem to be hampered by broadly weak or negative perceptions in the wake of the global financial crisis and concerns about the viability of our dependency on fossil fuels: hence the larger negative disparity between market cap and FutureBrand Index ranking for most of the organizations in these sectors.

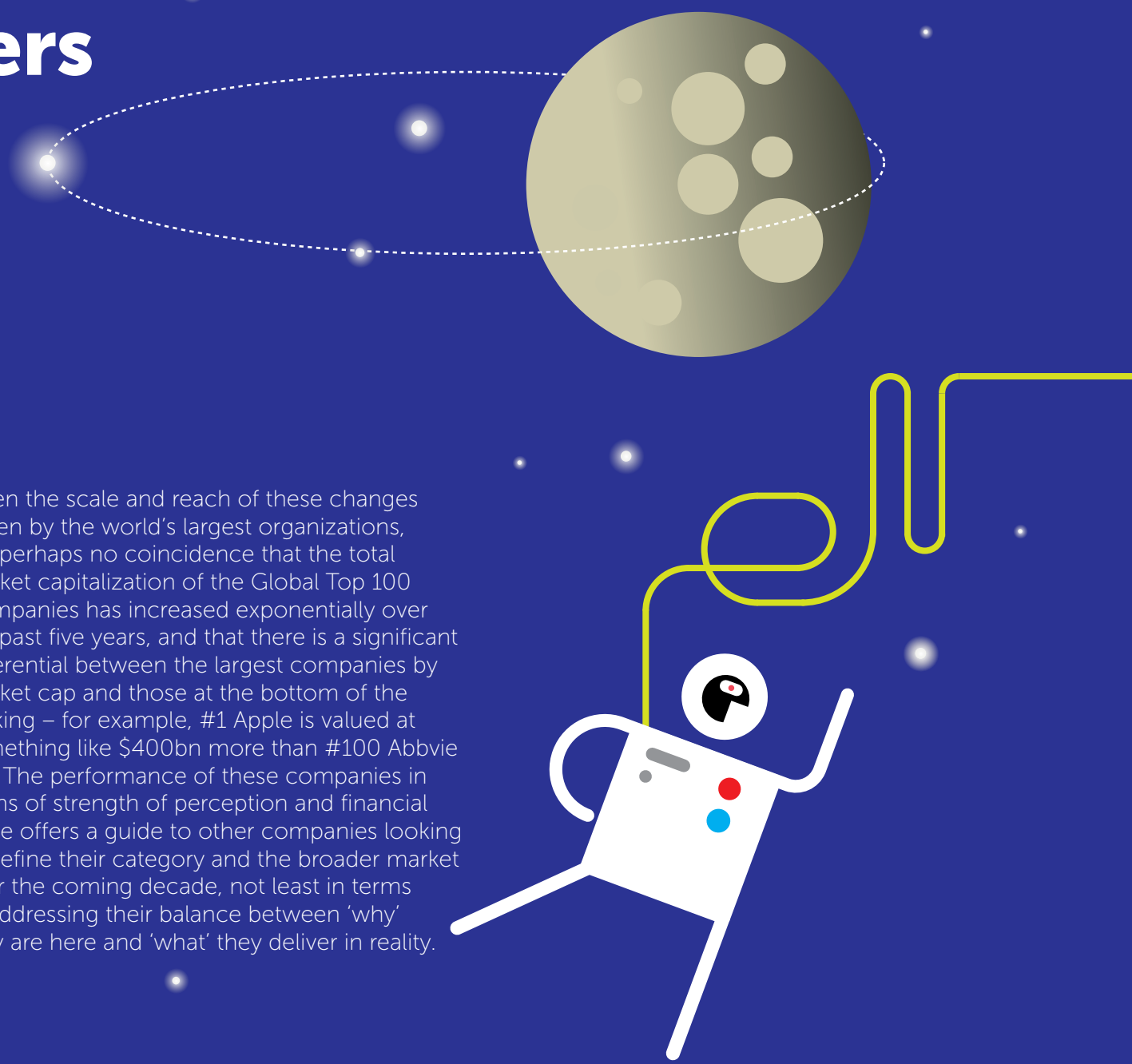


6.2 Future Drivers

3. An appetite for increased simplicity and convenience in consumer products and services.

The third driver relates to an appetite for increasing simplicity and convenience in the consumer products and services sectors. As technology continues to integrate different aspects of our lives, from the things we buy to the services we depend on, our social lives and our personal data and wellbeing, people will look to the largest organizations in the world to make life easier. This expectation has, no doubt, been partly created by the powerful positive improvements the top ten organizations in the FutureBrand Index have brought to our lives in the last decade – making everything from global mapping, instant global information, the mobile internet and communications, home computing, workplace productivity, on-demand entertainment, sustainable consumer goods and next generation hybrid fuel technologies available to the mass market for the first time in history.

Given the scale and reach of these changes driven by the world's largest organizations, it is perhaps no coincidence that the total market capitalization of the Global Top 100 Companies has increased exponentially over the past five years, and that there is a significant differential between the largest companies by market cap and those at the bottom of the ranking – for example, #1 Apple is valued at something like \$400bn more than #100 Abbvie Inc. The performance of these companies in terms of strength of perception and financial value offers a guide to other companies looking to define their category and the broader market over the coming decade, not least in terms of addressing their balance between 'why' they are here and 'what' they deliver in reality.



Experience dimensions and their attributes

1. Builds a strong emotional connection.

Personality

Consumers perceive the same kind of personality types in brands as in people – and seek out brands that exhibit their desired personality traits by category. Perceptions of a strong and clear personality are critical to emotional connection. There are 5 key personality dimensions: sincerity, excitement, competence, sophistication and ruggedness.

Story

People build their identities around narratives – where they are from, who they know, what they have achieved – and are drawn to brands with strong stories as a result. The strongest stories are those that are created around archetypes – universal ideas and characters that transcend cultures to touch all of human experience.

Attachment

Attachment Theory has shown that what we think of as love or emotional connection can actually be understood in terms of degrees of attachment and attachment styles developed through continuous social interaction. The ideal state for people, as for brands, is of a 'secure' attachment, in which unquestioned trust and positive dependency is developed through experience.

Experience dimensions and their attributes

2. Engaging experience at every touchpoint.

Consistency

Brands are a promise of consistent experience. We use them as heuristics – mental shortcuts – in a world of choice and limited time to avoid risk and recreate good experiences. It is vital, therefore, that our experience of a brand across different touch points is as consistent as possible to avoid reducing our belief in the brand being a safe option next time. This means it should look and sound the same, have the same taste and ingredients, communicate the same ideas or deliver the same performance quality every time you encounter it – from eating a meal to standing in a queue for the till.

Seamlessness

We live in a world where the physical and digital environments have merged. It is possible to interact with a brand in multiple channels in parallel and we want the brand to acknowledge and optimize our personal experience with that in mind. It is not enough for brands to be consistent. The 'connectedness' of a brand, and the intelligent use of data to personalize every interaction in real-time, is vital to a feeling that we are at the heart of a customer-centric experience.

People

How people behave, from leaders of corporations to customer care representatives in call-centres, is a critical part of our brand experience. The extent to which those people seem to believe in their work, care about us personally and follow through on their commitments determines how strong we feel the brand to be. In the end, technology can enable self-service and efficiency, but people are at the heart of engagement.

Experience dimensions and their attributes

3. Makes peoples' lives better

Pleasure

The best brands bring us pleasure. From sensorial experiences to pride of ownership and the delight of a high quality product, brands should trigger positive feelings. When they do, they improve our experience of life and we want to share them with others and recreate the same pleasures as often as possible. The extent to which an organization, product or service is associated with human pleasure is an important ingredient in brand strength.

Wellbeing

People are increasingly preoccupied with their general wellbeing – from mental and physical wellness to spiritual health. In addition to bringing us pleasure, brands have an opportunity to contribute to that wellbeing by focusing on human needs and interests and considering what is 'good' for people in consumer, organizational and community life. The more a brand is felt to improve wellbeing, the more it will be connected with making peoples' lives better.

Respect

Brands need to demonstrate that they respect people and the broader environment in which they operate. This can mean everything from respecting human difference and diversity to careful stewardship of natural resources and courtesy in a customer interaction. It is a function of empathy and critical to creating trust and loyalty by helping people to build and maintain self-esteem. The more a brand can show it does this through its experience, the more authentically it will be felt to improve life in the broadest sense.

Purpose dimensions and their attributes

4. *Compelling vision for the Future.*

Purpose

We are increasingly drawn to brands with a strong sense of 'why' they are here beyond the act of making money. This purpose is an articulation of core beliefs with which people can identify. It also guides the brand or organization towards the future it wants to see, and is the motivational force that gets people up in the morning. It's what the brand or organization is here to do, rather than a list of its attributes, features or benefits.

Inspiration

For a vision to be compelling, it has to inspire change and action. Inspiration is figuratively about the process of being 'mentally stimulated to do or feel something, and especially to do something creative'. Brands that inspire people to change for the better and help them to see what could be possible in the future are the most compelling choice for today.

Authenticity

A brand can have a lofty vision, but it needs to connect genuinely to the task of an organization or the qualities of a product or service. We need to see the relationship between the future a brand wants to create and what it can legitimately deliver today, not least so that we can realistically participate in creating that future for ourselves through consumption, investment or employment.

Purpose dimensions and their attributes

5. Redefines the category.

Innovation

A brand needs to go beyond change or novelty for its own sake, and instead focus on inventing products, services or experiences that are genuinely useful. Being known for this kind of innovation means that a brand focuses on adapting to the changing needs of its customers, consumers or market, rather than incrementally improving against its competition, and has more chance of shaping the future of its category as a result.

Thought leadership

Strong brands are always driven by strong ideas, and are unafraid of expressing clear views about their category, market or the broader world. They take a position and defend it with consistency and evidence. They want to inform what we think and how the world understands what they offer, rather than allowing other people to define it for them.

Individuality

Above all, strong brands are differentiated from their competition. They express a unique identity, values and personality that help them to stand out and be easily recognized. This is often at the cost of 'fitting in' and playing to category norms, which calls for a clear sense of who they are, why they are here and how it is of benefit to their customer or consumer.

Purpose dimensions and their attributes

6. *Delivers sustainable value.*

Indispensability

Would the world, or your life, be worse if the brand ceased to exist tomorrow? In what way and would there be a credible alternative? The key to delivering brand value over the long term is to be seen as vital to peoples' lives today: to be something we cannot live without. This applies to organizations as much as products and services and the stronger the perception of indispensability, the more likely it is that the brand can be seen to address the fundamental needs of its stakeholders or customers.

Resource management

Does the brand make the best use of available resources – from people to materials and energy? Increasingly, brands are scrutinized for their supply chain and ethical credentials as much as their price, availability and quality. Organisations are expected to consider their environmental, economic and social impact in the normal course of business. And the same considerations are increasingly important drivers of consumer choice in categories as diverse as food, fashion and automotive. It is no longer a matter of 'green washing' or environmentalism – the imposed sacrifice of comfort and progress to save the world – but a requirement to make the best use of what we have and consider our impact for the long term.

Price premium

Brands bring measurable asset value to an organization. The stronger they are, the more valuable the product, service or company becomes. Sustainable business cannot be achieved without consumers, customers or investors being prepared to value your brand more highly than an equivalent competitor. Which means a willingness to pay more to benefit from the brand when presented with a choice. Or feeling that there is no equivalent alternative.

Thank you!

For further information
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