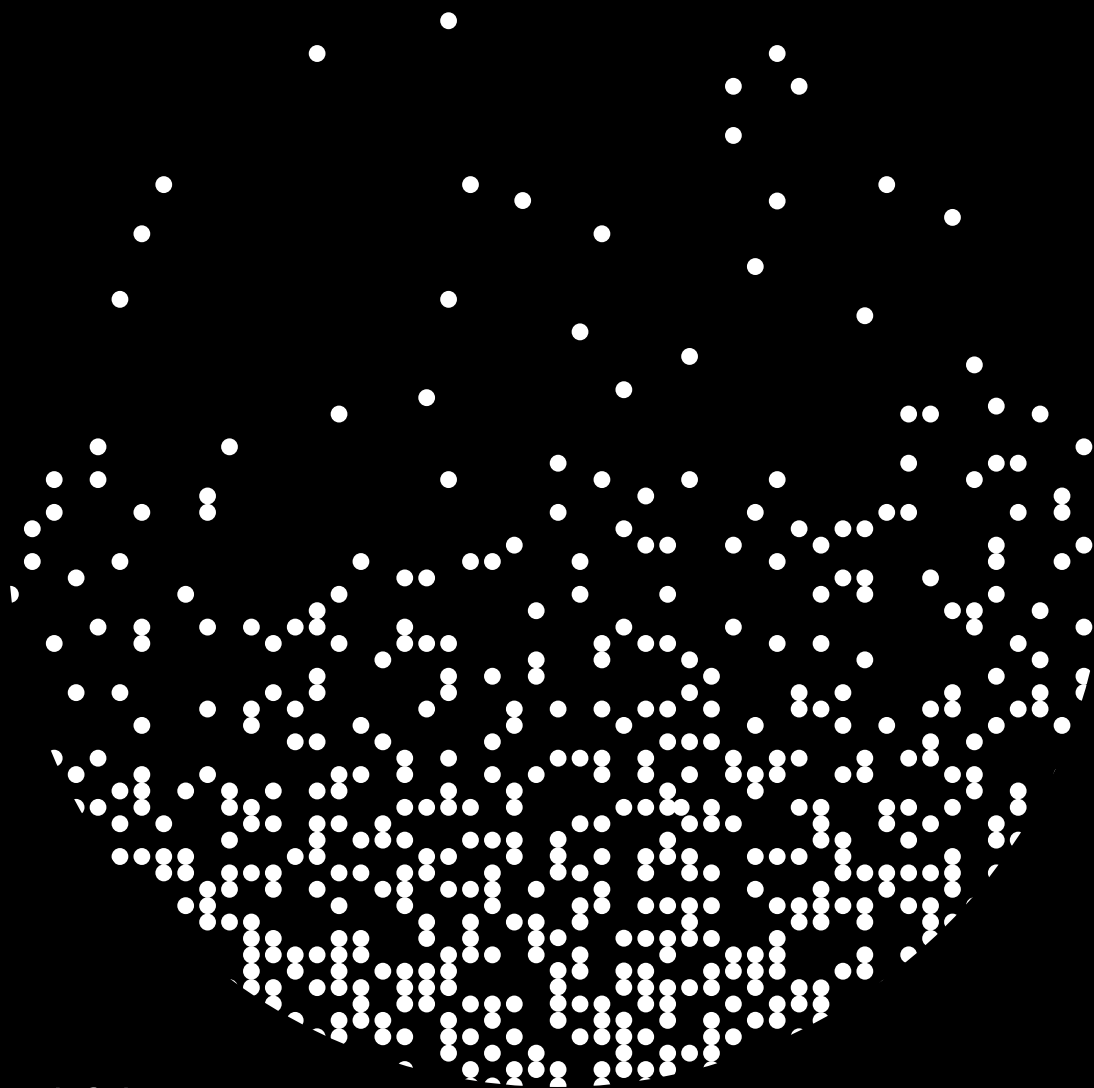


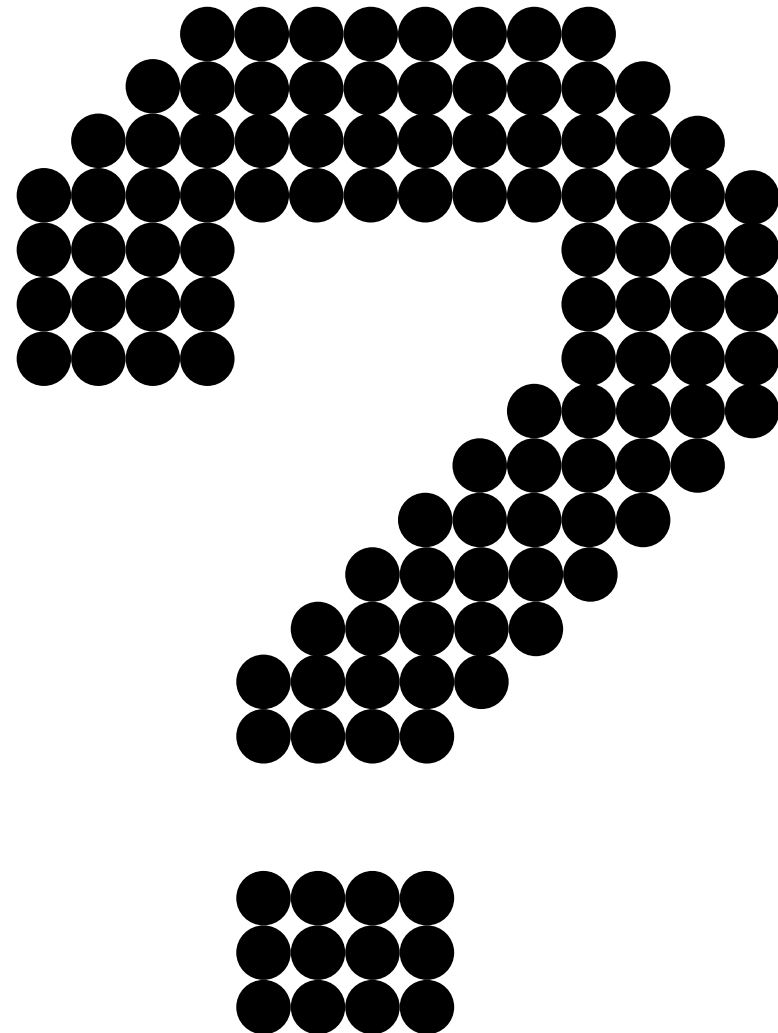
The World's Simplest Brands



For more insights on how simplicity
drives business results, visit:

simplicityindex.com

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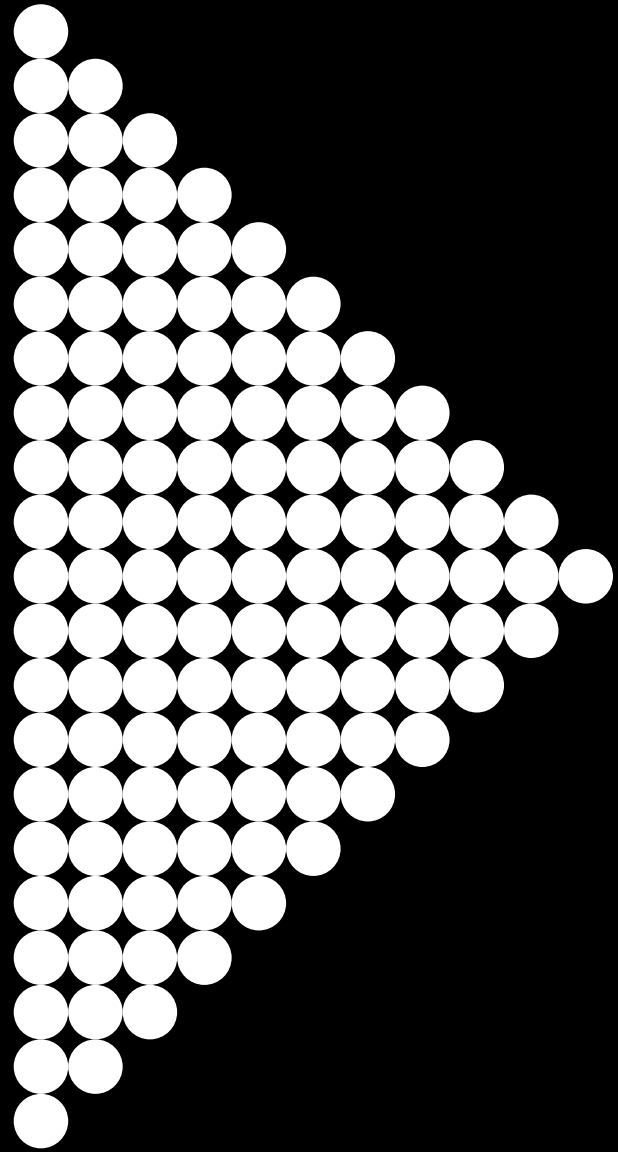
What's the value of simplicity?

We set out to answer exactly that.

We surveyed more than 15,000 people across nine countries to understand which brands and industries provide the simplest experiences. In today's shifting political, economic and cultural landscapes, people around the world are prioritizing simplicity.

Now in its eighth year, our study reveals the world's simplest brands are ones that put clarity and ease at the heart of the customer experience.

Our findings reaffirm that simplicity inspires deeper trust and strengthens loyalty. People are also more likely to recommend a brand that delivers simple experiences. In the end, simplicity drives financial gain for brands willing to embrace it.



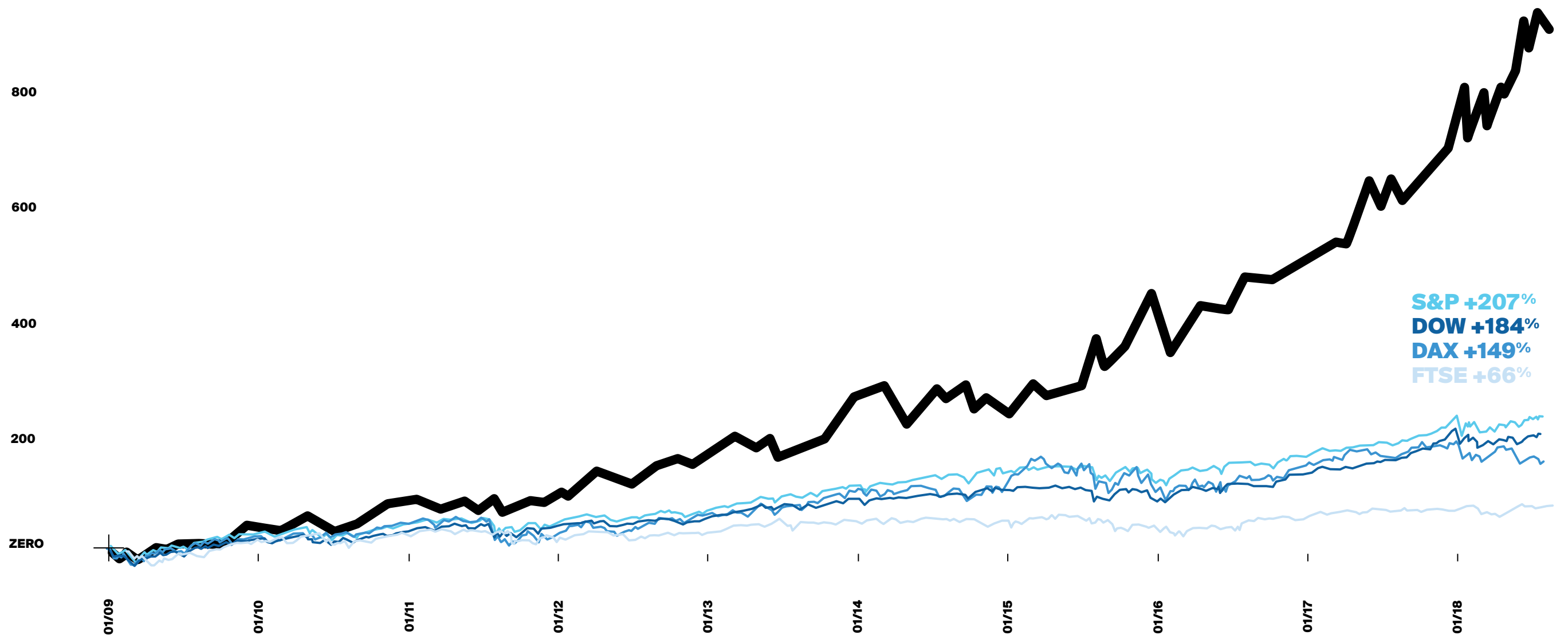
Drum roll, please.

How does simplicity pay for brands that embrace it?

+830%

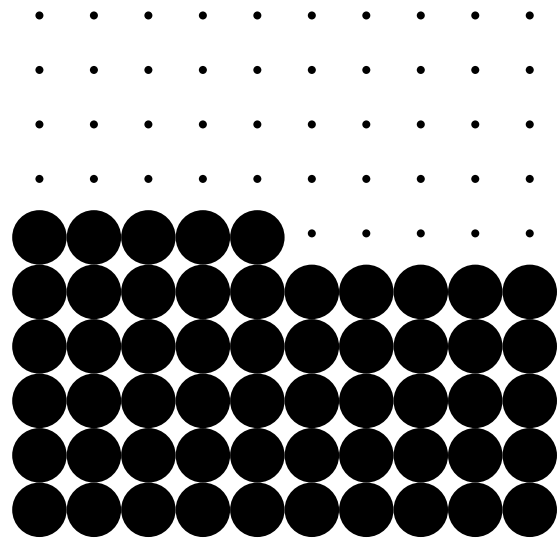
Simplicity portfolio growth

Since 2009, a stock portfolio comprised of the publicly traded simplest brands in our global Top 10 has outperformed the major indexes by **679%**.



Simplicity pays

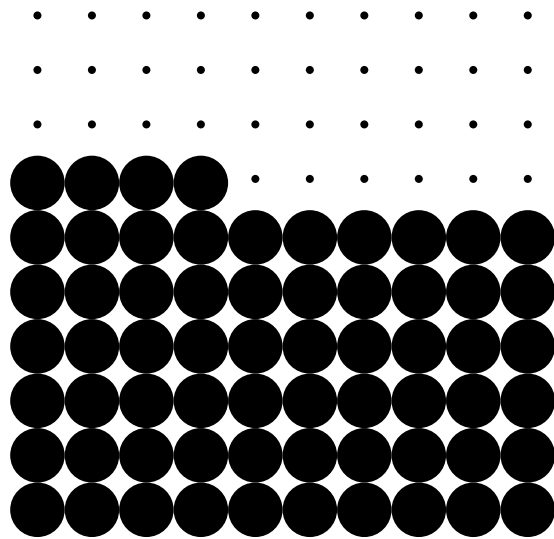
55%



Premium

The percentage of consumers willing to pay more for simpler experiences.

64%



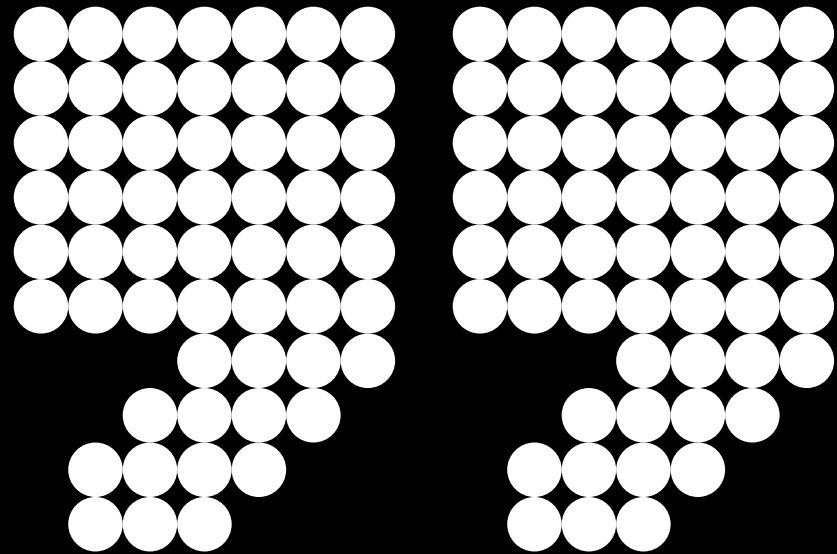
Loyalty

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

\$98 Billion

Money on the table

The amount of money brands are leaving on the table when they don't simplify.



Netflix has a few simple plans for every kind of user with more content every year.

Female, 36, United States

“ALDI is a simply structured business. The stores are similar and products are almost always found in the same place.”

Female, 47, Germany

“Google is my first choice as it makes my day simpler.”

Male, 55, India

“Lidl has a variety of useful goods at simple prices with weekly offerings.”

Male, 45, United Kingdom

“Carrefour makes the life of the consumer easier and simpler with the goods and products they sell.”

Female, 25, United Arab Emirates

Global



1

NETFLIX

Netflix, the entertainment subscription service that streams around 250 million hours of video per day, ascends from fourth place to become the World's Simplest Brand. Whether you're vegging out at home or aboard a cross-country red-eye, hosting your own personal Bill Murray retrospective or rewatching all ten seasons of Friends is as easy as reaching for a device, opening an app and pressing Play. The platform takes ease of experience one step further, with algorithms that track your viewing patterns, eliminating the difficult decision-making process of what to watch next.

In 2018, after receiving more Emmy nominations than any other network, cable provider or streaming service, Netflix took home 23 awards, tying with HBO for the most Emmys. In a rapidly changing television industry, the historic victory proves the streaming giant is poised to steal the throne from premium cable outlets.

With 130 million users across 190 countries, "Netflix and chill" is more than just Millennial.

2



Simple, consistent floor plans, high-quality products, low prices, and excellent customer service prove that ALDI is determined to give value back to its loyal customers. As one content shopper succinctly put it, the brand "saves me time, and I have never been disappointed."

3

Google

While it's a radically different world since Google launched 20 years ago, the brand hasn't strayed from its original mission: to organize the world's information and make it universally accessible and useful. Even though the tech industry has faced scandals over the past year, Google soldiers on.

4



Far from a cookie-cutter supermarket, the German global discount chain revolutionized the in-store experience by mastering efficiency—offering hassle-free shopping that gets busy shoppers in and out, and on with their lives. Clearly, customer satisfaction remains Lidl's top priority.

5



French multinational retailer Carrefour pioneered the concept of buying everything from fresh fruit to dry goods all under one roof. In 2018, Carrefour announced plans to join forces with Tesco, enabling both brands to improve the quality and choice of products available to customers, at even lower prices.

6



Whether you're jonesing for a box of McNuggets or an icy McFlurry, McDonald's has made it even simpler to satisfy your cravings. In addition to refining its "easy to recognize" menu, Mickey D's is upgrading locations with self-serve kiosks and table service. Its mobile ordering continues to expand too, so even couch potatoes can get their french fry fix.

7

trivago®

Founded in 2005, trivago allows travelers to effortlessly search over 1.3 million hotels in over 190 countries to find the ideal hotel at the best price. Currently operating on 55 live international platforms in 33 languages, finding a place to rest your weary head has never been simpler with trivago.

8



With a library boasting more than 20 million songs, Spotify is a fan favorite for its consistency and dedication to innovation. Recently, the service added Spotify Premium for Students, which provides access to Premium music as well as streaming services from Showtime and Hulu, offering a complete world of sound and vision at an unprecedented value.

9



Named after a compound of "unique" and "clothing," Uniqlo has established itself as a fashion empire. With a philosophy rooted in simplicity, quality, and longevity, Uniqlo creates apparel to make your life better. But don't confuse simple with basic—Uniqlo has a long history of successful collaborations, including collections with Jil Sander and The Andy Warhol Foundation.

10

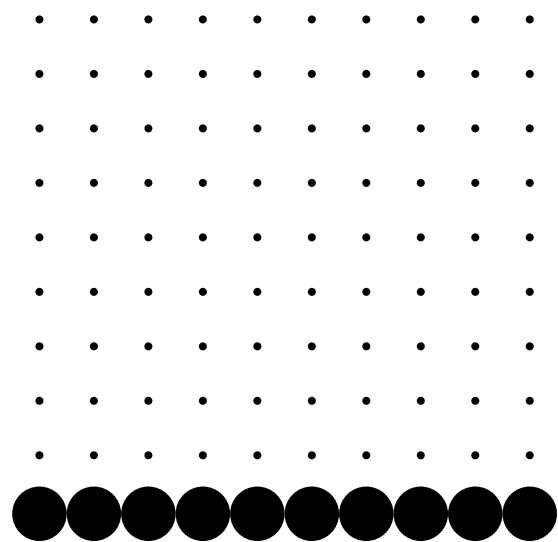
SUBWAY®

Known for fresh, affordable, made-to-order sandwiches, Subway continues to make strides in simplicity. As part of an ongoing brand refresh, the restaurant chain unveiled "Fresh Now," a new program emphasizing a more personalized guest experience. Investing \$80 million in the program, Subway aims to update all of its 26,000 U.S. locations by next summer.

The simplicity premium

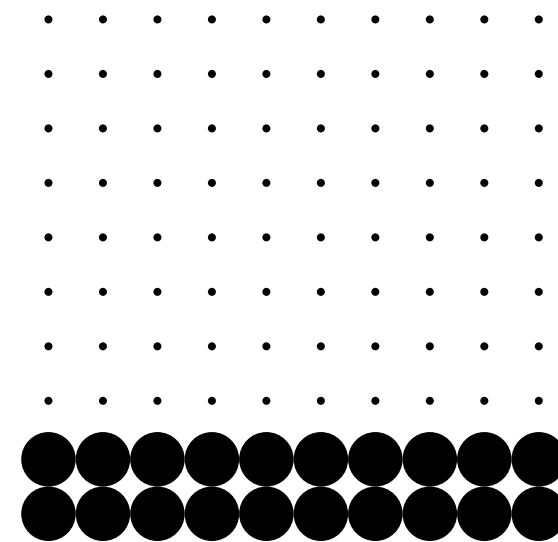
People are willing to pay more depending on the industry.

0-10%



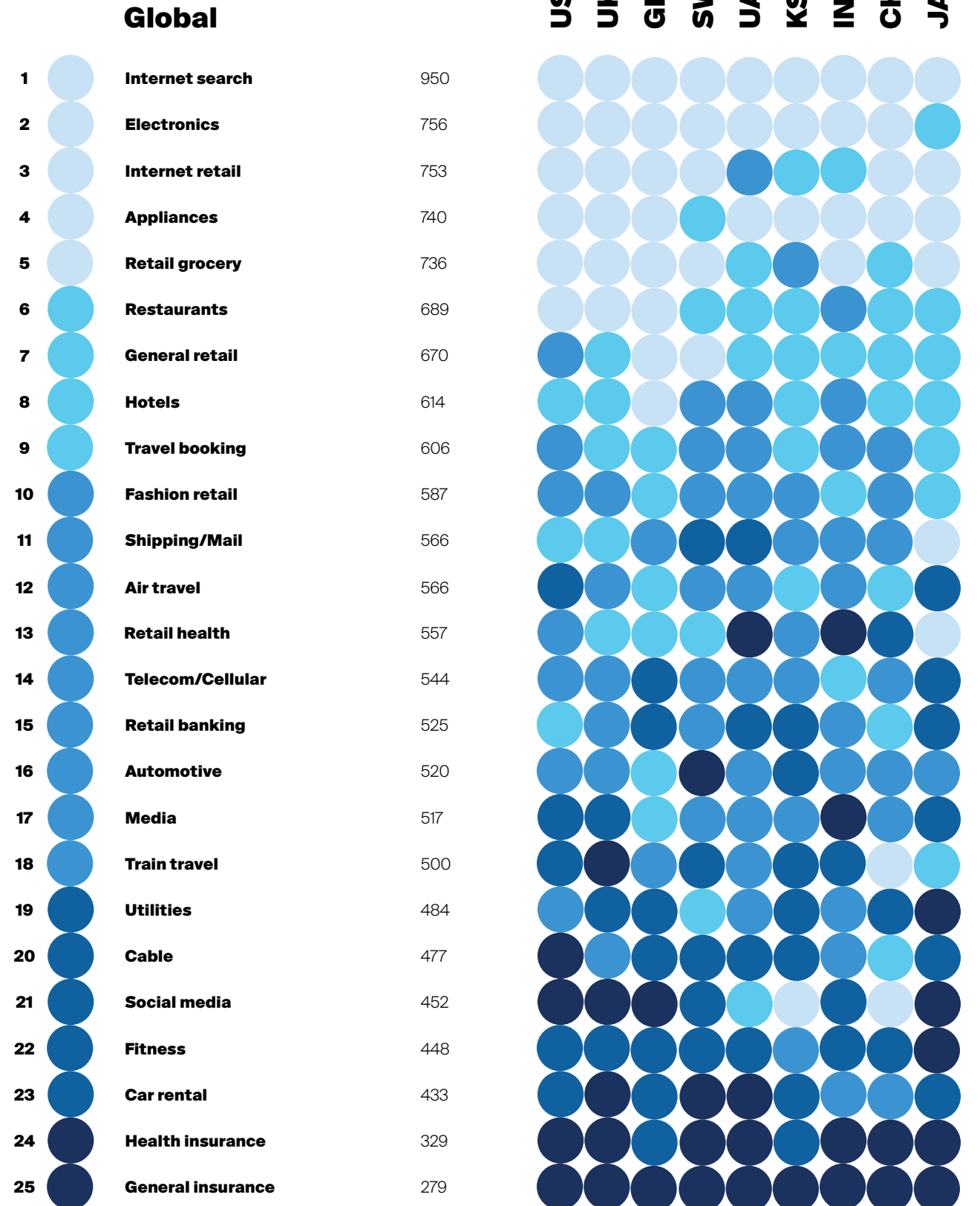
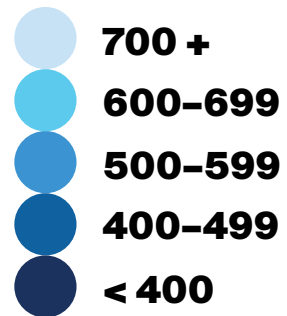
- Appliances**
- Retail banking**
- Internet retail**
- General retail**
- Retail health**
- Retail grocery**
- Restaurants**
- Train travel**
- Utilities**
- Media**

10-20%

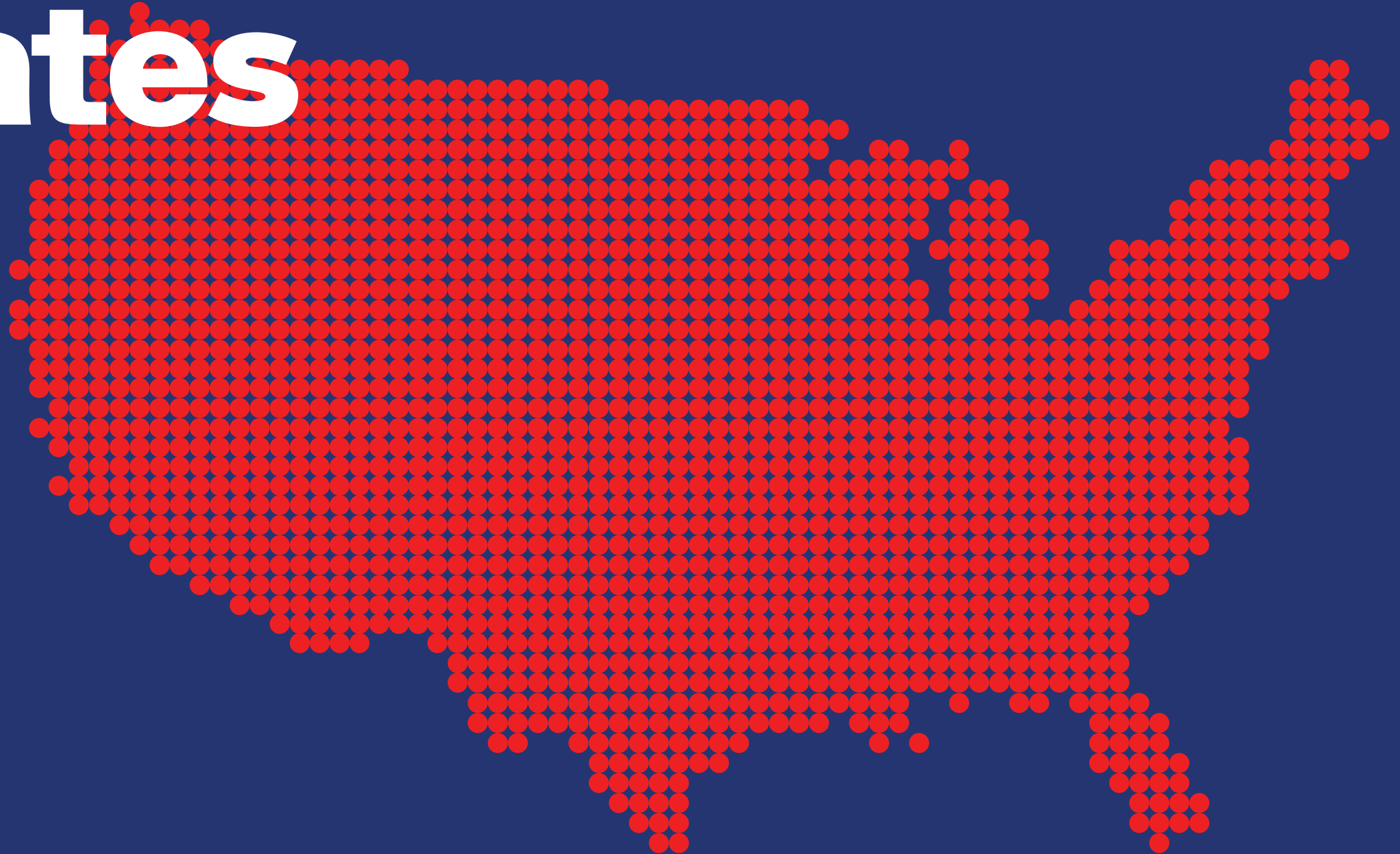


- Automotive**
- Car rental**
- Travel booking**
- Health insurance**
- Hotels**
- Fitness**
- Air travel**
- Electronics**
- Cable**
- General insurance**
- Retail fashion**
- Telecom/Cellular**
- Shipping/Mail**

How do simplicity scores compare by industry across the globe?



United States



1

lyft

2



3



4



5



6



7



8



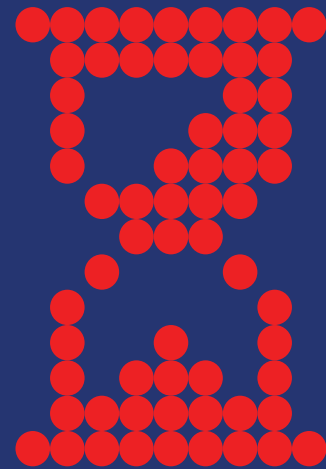
9



10



1



Internet search

2



Restaurants

3



Internet retail

4



Retail grocery

5



Appliances

6



Electronics

7



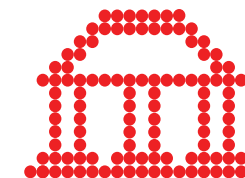
Hotels

8



**Shipping/
Mail**

9



Retail banking

10



General retail

United Kingdom



1

NETFLIX

2



3



4



5



6



7



8



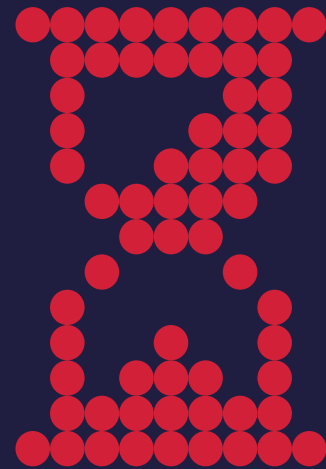
9



10



1



Internet search

2



Internet retail

3



Retail grocery

4



Restaurants

5



Appliances

6



Electronics

7



General retail

8



Travel booking

9



Hotels

10



Retail health

Germany



1



2



3



4



5



6



7



8



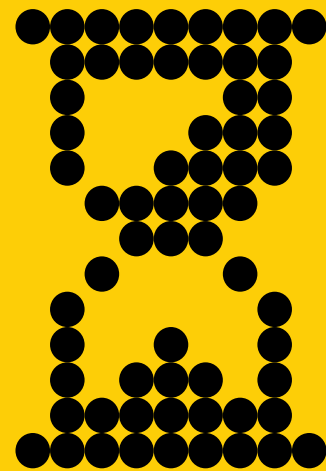
9



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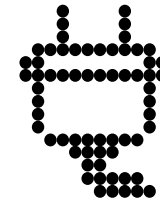


1



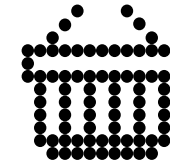
Internet search

2



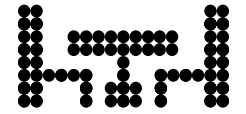
Appliances

3



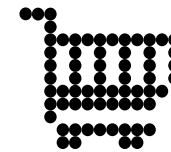
Retail grocery

4



Restaurants

5



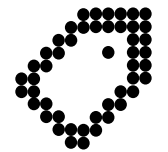
Internet retail

6



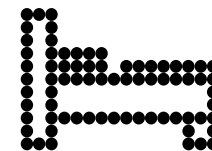
Electronics

7



General retail

8



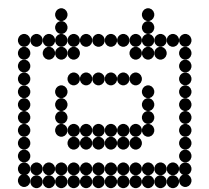
Hotels

9



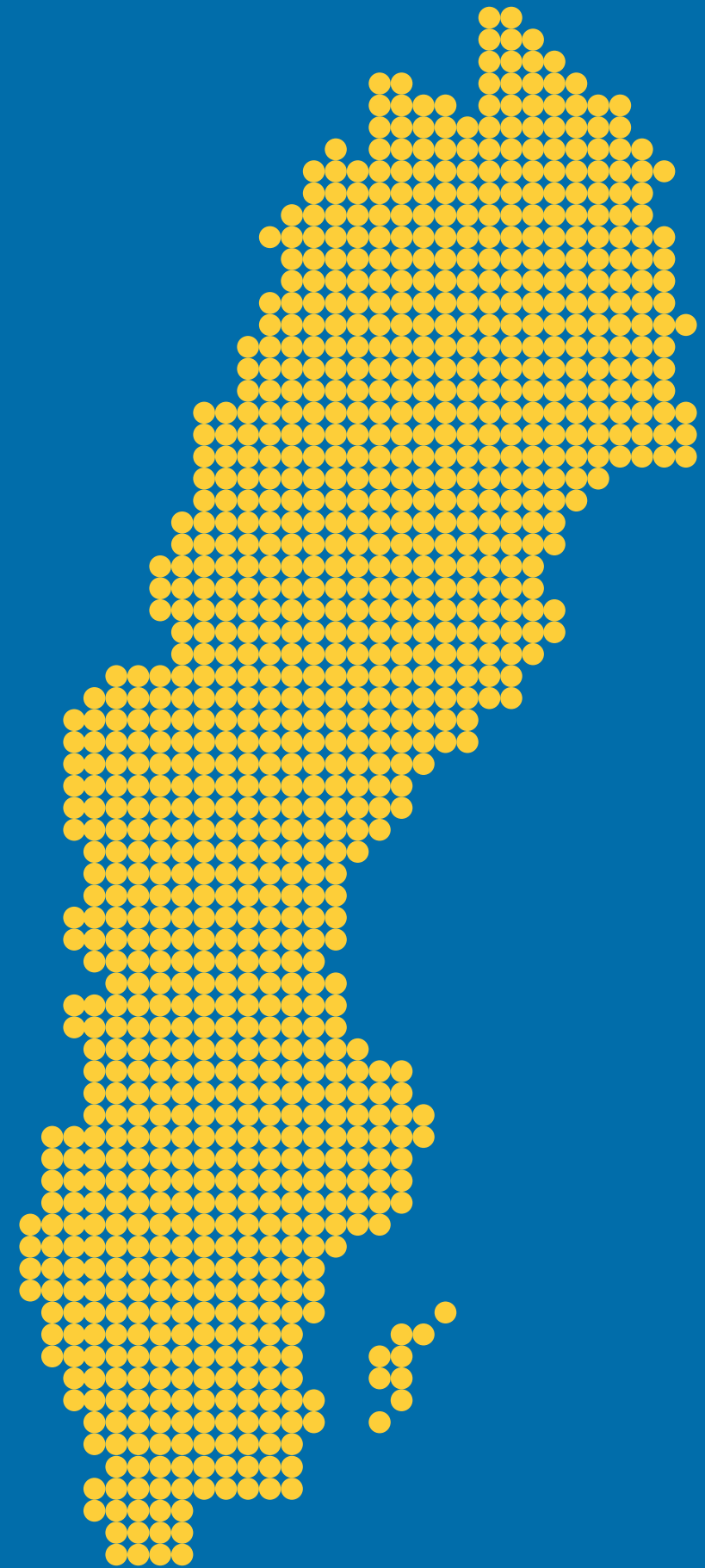
Fashion retail

10



Travel booking

Sweden



1



2



3



4



5



6



7



8



9



10

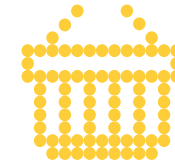


1



Internet search

2



Retail grocery

3



General retail

4



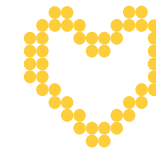
Internet retail

5



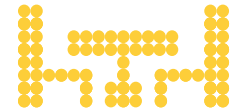
Electronics

6



Retail health

7



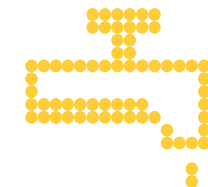
Restaurants

8



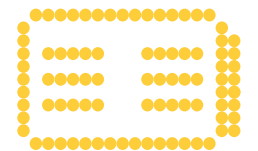
Appliances

9



Utilities

10



Media

United Arab Emirates



1

Google

2



3



4



5



6



7

Splash

8



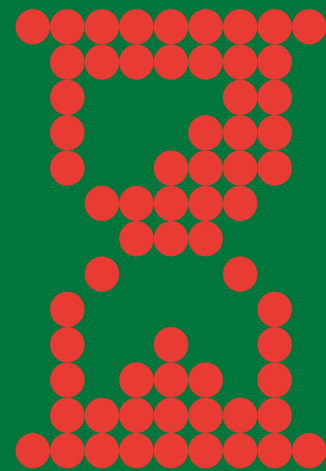
9



10



1



Internet search

2



Electronics

3



Appliances

4



Retail grocery

5



Restaurants

6



General retail

7



Social media

8



Air travel

9



Telecom/
Cellular

10



Travel booking

Saudi Arabia



1



2



3



4



5



6



7



8



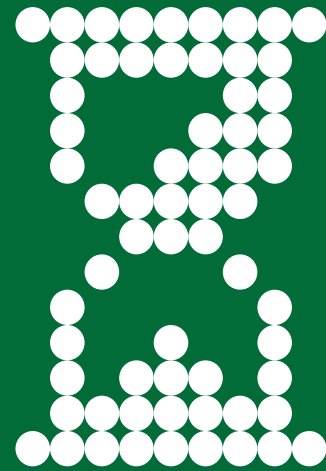
9



10



1



Internet search

2



Electronics

3



Appliances

4



Social media

5



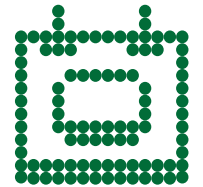
Restaurants

6



Air travel

7



Travel booking

8



Internet retail

9



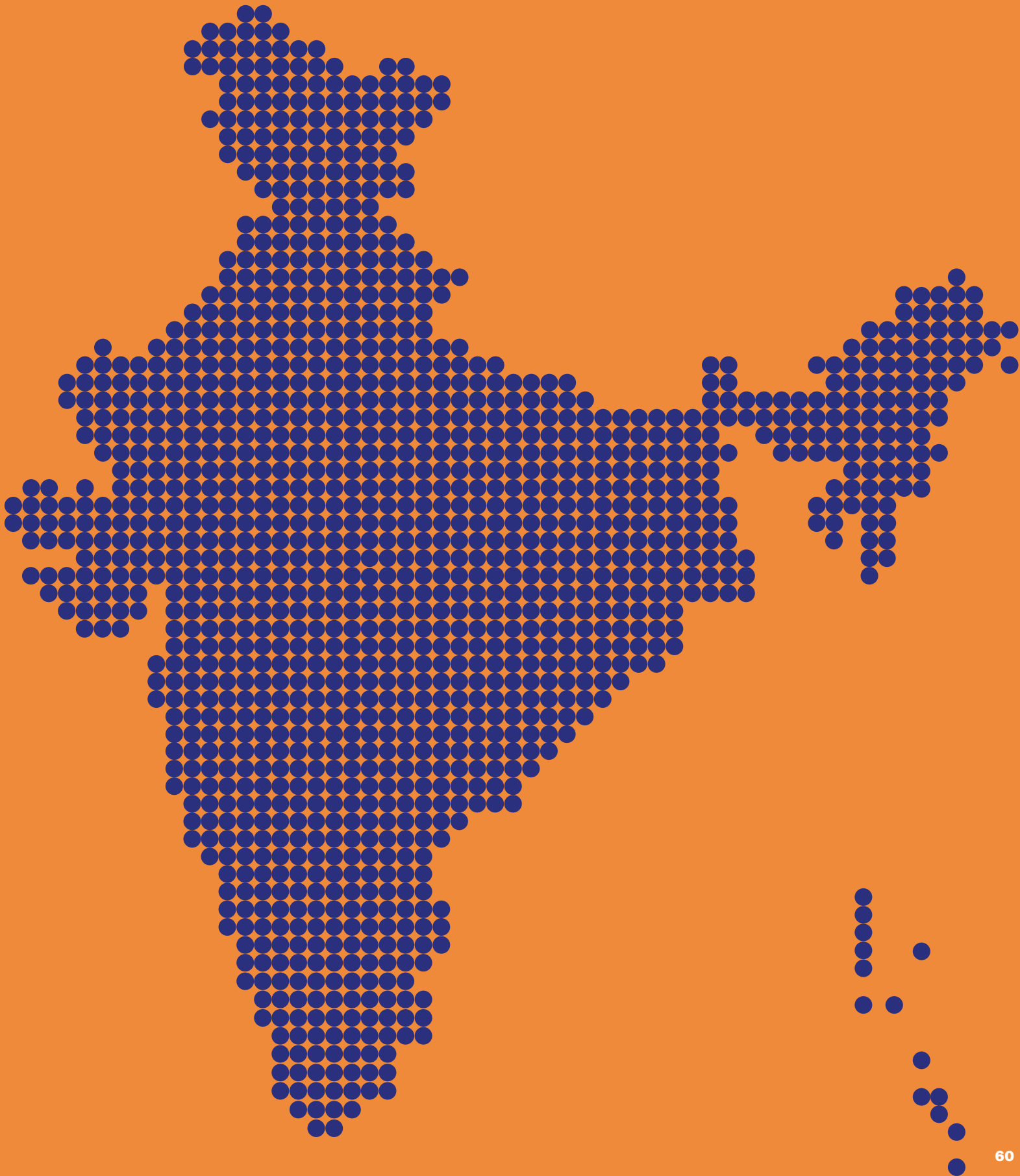
General retail

10



Hotels

India



1

Google

2

amazon

3

MARUTI SUZUKI

4

NOKIA

5

SONY

6

hp

7

make my trip

8

PHILIPS

9

DELL

10

TVS

1



Internet search

2



Electronics

3



Appliances

4



Retail grocery

5



General retail

6



Internet retail

7



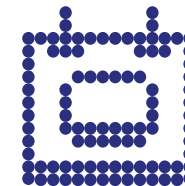
Telecom/
Cellular

8



Retail fashion

9



Travel booking

10



Car rental

China



1



2



3



4



5



6



7



8



9



10



1



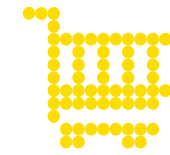
**Internet
search**

2



Electronics

3



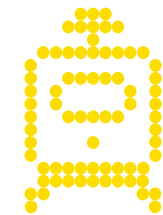
**Internet
retail**

4



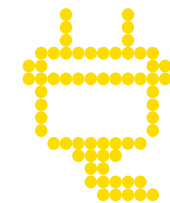
**Social
media**

5



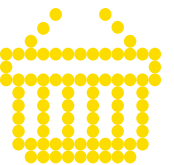
**Train
travel**

6



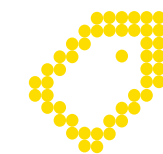
Appliances

7



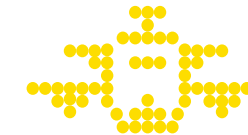
**Retail
grocery**

8



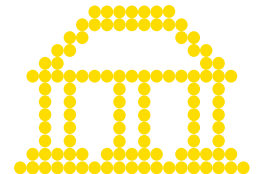
**General
retail**

9



**Air
travel**

10



**Retail
banking**

Japan



1



2



3



4



5



6



7



8



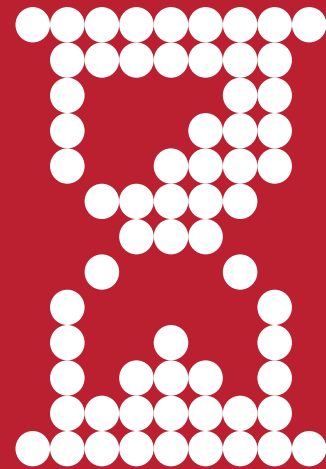
9



10



1



**Internet
search**

2



**Internet
retail**

3



Appliances

4



**Retail
health**

5



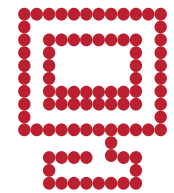
**Retail
grocery**

6



**Shipping/
Mail**

7



Electronics

8



**Retail
fashion**

9

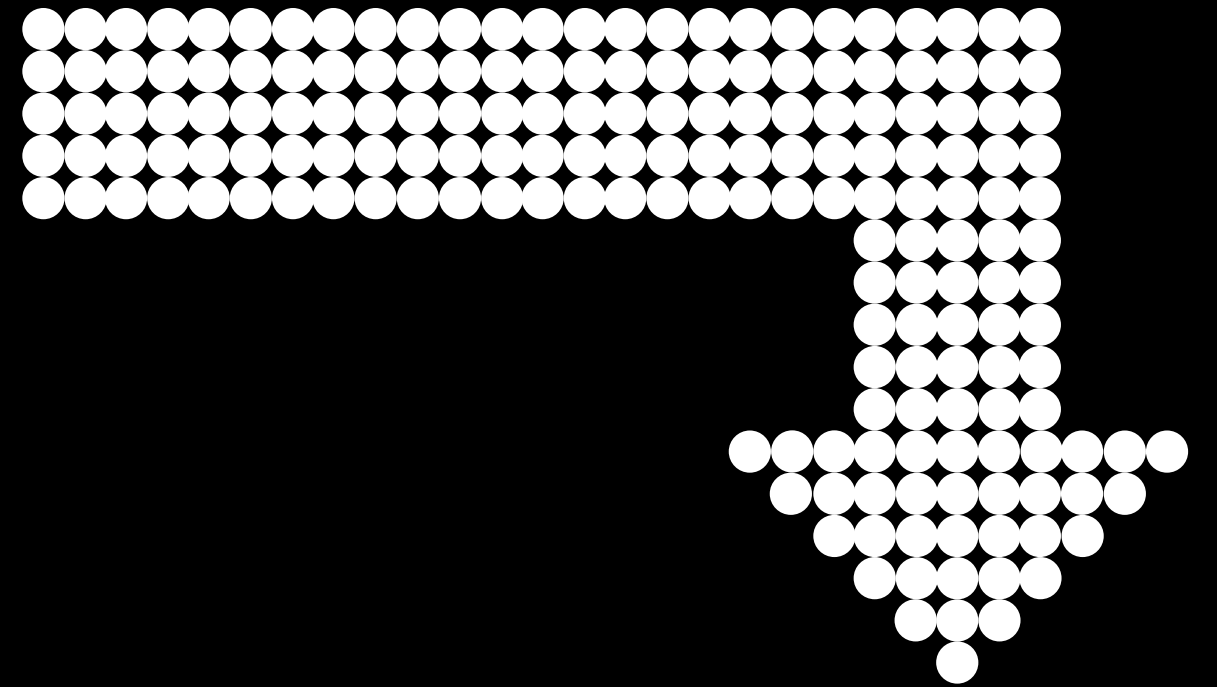


**General
retail**

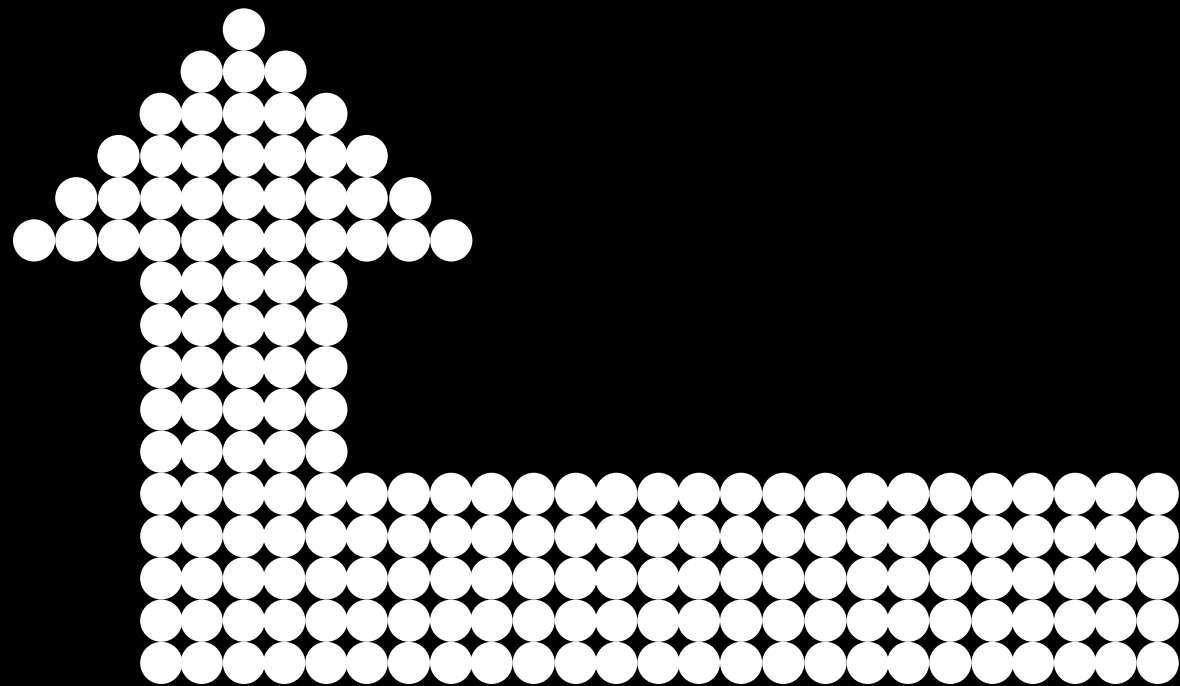
10



Hotels



Methodology



15,750

Consumers

9

Countries

800

Brands

Survey topics

This year's respondents answered questions about brand touchpoints within specific industries and brands, including:

- Their perceptions of experiences within 25 industry categories they experience in daily life
- How familiar they are with certain brands
- Whether they recently used these brands
- Their willingness to pay more for brands they currently use if they provided simpler experiences
- The simplicity/complexity of a brand's communications and interactions in relation to their industry peers

Brand Simplicity score

Respondents in each country rated more than 100 brands. 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 Simplicity 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 Simplicity Score for the brand's industry or category(ies)

Industry Simplicity score

Each country rated the following industries: Appliances, Automotive, Retail banking, Electronics, Fitness, General insurance, Health insurance, Internet search, Internet retail, Media, Restaurants, Fashion retail, General retail, Retail grocery, Retail health, Shipping/Mail, Social media, Cable, Telecom/Cellular, Air travel, Travel booking, Car rental, Hotels, Train travel, 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
 - 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 unexpectedly fresh and remarkably clear.
We offer a full suite of services:**

**Employee engagement
Strategy
Naming
Design
Brand communication
Global implementation
Research
Business analytics**

#SimplicityPays

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