

Global Brand Simplicity Index 2017

Showing the
impact of
simplicity on
the world's
leading
brands

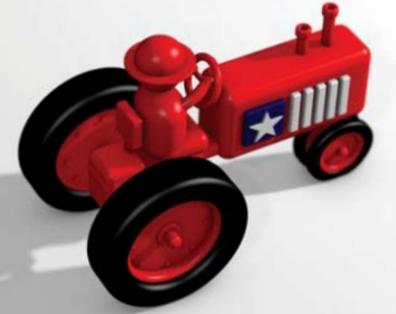
Siegel+Gale
Simple is smart.



Global Brand Simplicity Index 2017

02 Forward
04 Highlights
12 Global
14 Top 10 global brands
16 Bottom 10 global brands
18 Industry comparison
26 United States
34 United Kingdom
42 Germany
50 Sweden
58 China
66 Middle East
74 India
82 Japan
90 Global disrupters
94 Research Methodology
96 About Siegel+Gale
97 Contact

Table of contents



What's the value of simplicity for the world's leading brands?

Each year we set out to answer exactly that.

What do we mean by simple? As a global brand strategy firm, Siegel+Gale has long held the belief that simplicity lies at the intersection of remarkably clear and unexpectedly fresh. Brands that deliver clear, human and useful experiences—win. The results are in.

From the tens-of-thousands of consumers we surveyed across the globe, we've learned that simplicity is the ultimate driver of brand loyalty. It inspires people to spend more, motivates employees to deliver on the brand promise—and ultimately drives financial gain for companies that embrace it.

While every year we learn new lessons about the value of simplicity, there is one enduring truth: simplicity pays.

Highlights

Simplicity pays

How does simplicity pay for brands that embrace it?

Highlights

Highlights

growth of index/portfolio

450%

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

+433%
Simplicity portfolio growth

400%

350%

300%

250%

200%

150%

100%

50%

ZERO

2009

2010

2011

2012

2013

2014

2015

2016

S&P: +135%
DAX: +116%
DOW: +106%
FTSE: +52%

Simplicity pays

64%

of consumers are willing to pay more for simpler experiences

Highlights

61%

of people are more **likely to recommend** a brand because it provides simpler experiences and communications

62%

of employees are considered brand champions in companies perceived to be **simple**

← vs. →

20%

of employees are considered brand champions in companies perceived to be **complex**

Highlights

\$86 Billion

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

Global movers & shakers

Highlights

Supermarket sweep

ALDI remains the simplest brand in our global index for the fourth year running, while competitor Lidl once again lands in the top three.



Results not found

Yahoo! drops 37 places, showing us that search isn't always simple.



Simplicity sells

Disruptive brands Dollar Shave Club and Jet.com land in the top US disrupters—their recent multi-billion-dollar price tags are further proof that simplicity pays.



Further complications

Insurance providers AXA just can't seem to break out of the bottom spot; they are the most complex brand for the second year running.



Fresh faced

Health and beauty product purveyor Sephora shows signs of rejuvenation this year, rising 44 spots in our global index.



Rise and shine

Global hotel chain Hilton moves up 50 spots this year—knowing they're perceived as simple should help them sleep well.



Taking off

After being grounded at 53 last year, easyJet has ascended 16 spots, a smooth takeoff for a customer-focused airline.



Super simplify me

Five out of six brands representing the restaurant industry in the global index rank in the top 15, indicating that quick service often equates to simple satisfaction.



Outrunning the competition

Puma is making strides in the UK index, leaping 44 spots and leading the fitness category for the region.



Highlights

Global

Top 10

1



Topping our index for the fourth year in a row, ALDI is clearly doing something right. With its simple, consistent store layouts, ALDI offers affordable, high-quality goods combined with a stress-free customer experience. Because the discount supermarket chain mostly carries exclusive products, customers don't have to choose between the typical and sometimes overwhelming array of brands and prices.

2



The secret to this global discount supermarket's success is the simplicity of its offering: inexpensive food without sacrificing quality or taste. In the words of one survey responder, Lidl is "around the corner, with always low prices, what more could you want?" Recently, the chain proved it is a reputable source for all things delicious and quality with simple and surprising idea. The high-profile Swedish pop-up restaurant "Dill" was revealed to be serving up a menu created entirely of Lidl products and produce.

3



Google—with its pristine and no-nonsense homepage—is synonymous with simplicity. With a user experience that is "intuitive and easy to understand" the search engine's perfect functionality keeps users coming back again and again. But not everything is pared down: the whimsical "Google Doodles" (Google's ever-changing logo illustrations) showcase the brand's personality. Simplicity can come with a sense of humor after all.

4



The video-streaming service has redefined the way we watch television and movies. With original high-quality shows and content that is always on-demand, Netflix "has figured out what customers want," according to one subscriber. Channel surfing is no longer necessary.

5



Known for its sleek and minimalist designs, the success of Ikea's business model is rooted in simplicity. "Ikea gives you everything you need for your home in just one visit," said one customer. By cutting out the middleman, Ikea makes taking furniture from the showroom shelf to the living room floor affordable and easy to assemble.

6



The e-commerce giant has simplified shopping to only two clicks. For customers who feel two-clicks are one too many, Amazon Dash Buttons demonstrate the brand's commitment to innovation with a single push. Because of Amazon's intuitive user interface and its speedy and reliable delivery system, all customers have to do is sit back, relax and wait for their orders to come to them.

7



Its chicken recipe is a well-kept secret, but there's no mystery why this global quick service restaurant is in our Top 10. Customers keep coming back because of its convenience and consistency. The simple menu makes filling up as easy as 1, 2 or 3. KFC's "tried and tested" reputation ensures that any choice will bring satisfaction.

8



This online video-sharing platform snags a spot in our global Top 10 due to the simplicity of its interface. Viewers applaud YouTube's easy navigation, intuitive user experience and powerful search function. Streaming cat videos to our desktops definitely has its benefits.

9



With familiar menus and convenient locations, McDonald's has always made dining simple. While the brand launched a new all-day breakfast menu, they are refocusing on simplicity. The proof? They recently cut down menu options and, in January, gave their packaging a sleek and simple redesign.

10



The secret to this restaurant's simplicity is obvious: customers can see exactly what they're going to get. With fast and friendly service, clear pricing and convenient in-store layouts, "all you need to do is choose what you want on your sandwich" says one diner, "and that's not very hard."

86 

Though the name suggests affordability, this car rental company lands in our Bottom 10 with prices that don't live up to its name. Drivers complain that pricing is complex, opaque and full of undeclared fees. When a brand doesn't provide what its moniker suggests, complexity is inevitable.

87 

It's no secret that Ryanair once again lands in the Bottom 10—customers have long warned of hidden fees. The budget airline charges for everything from name changes on your ticket to checking in at the airport. While the choice to save as you fly should be a simple one, Ryanair's complex pricing has customers second-guessing.

88 

According to customers, there are many components of this global bank's services that just don't seem simple. Credit card charges and product interest rates are "confusing" and "nontransparent" while others warn of unfriendly in-store experiences. Further, the brand's fraud allegations over the past few years do little to inspire consumer confidence.

89 

For car rental company Hertz, customer confusion begins with its identity. While some consumers were aware of the brand, many could not explain the services Hertz provides. "Their ads are too complex," said one. Those familiar with the brand reported complicated fine print and "misleading" prices.

90 

Insurance is often considered complex. According to customers, MetLife is making insurance seem even more complicated than expected. With contracts that are "difficult to understand," supposedly misleading product categories and unclear pricing, this insurer needs a new prescription to break the Bottom 10.

91 

Drivers complain of Avis's confusing prices, hidden fees and unfriendly in-store experiences. However, this year Avis appears to be making progress on the road to simplicity. Its new app, Avis Now, puts the entire car rental process—from booking to return—at customers' fingertips.

92 

According to users, this social network's cumbersome interface is what brings it near the bottom of our index. Complicated navigation and an excessive suite of features makes members feel "It's too complex to even use." Hopefully Microsoft, its new owner, will see simplicity as this brand's missing link.

93 

When it comes to health, people want the truth. But according to patients, global healthcare company Bupa does not deliver. Many complain about complex conditions and insurance terms with hard-to-understand prices.

94 

Aviva again proves that making insurance simple is no easy task. Customers often complain of "hidden" conditions in contracts, and unaffordable pricing—not the ideal experience for a customer base that is seeking peace of mind.

95



This global insurance company takes the bottom spot for the second year in a row. Consumers complained that pricing across products was "inconsistent" and "opaque." Though it appears AXA is reducing complexity by divesting select business units, it might be a while before this brand can sell customers on the prospect of simple insurance.

Bottom 10

Global

Global

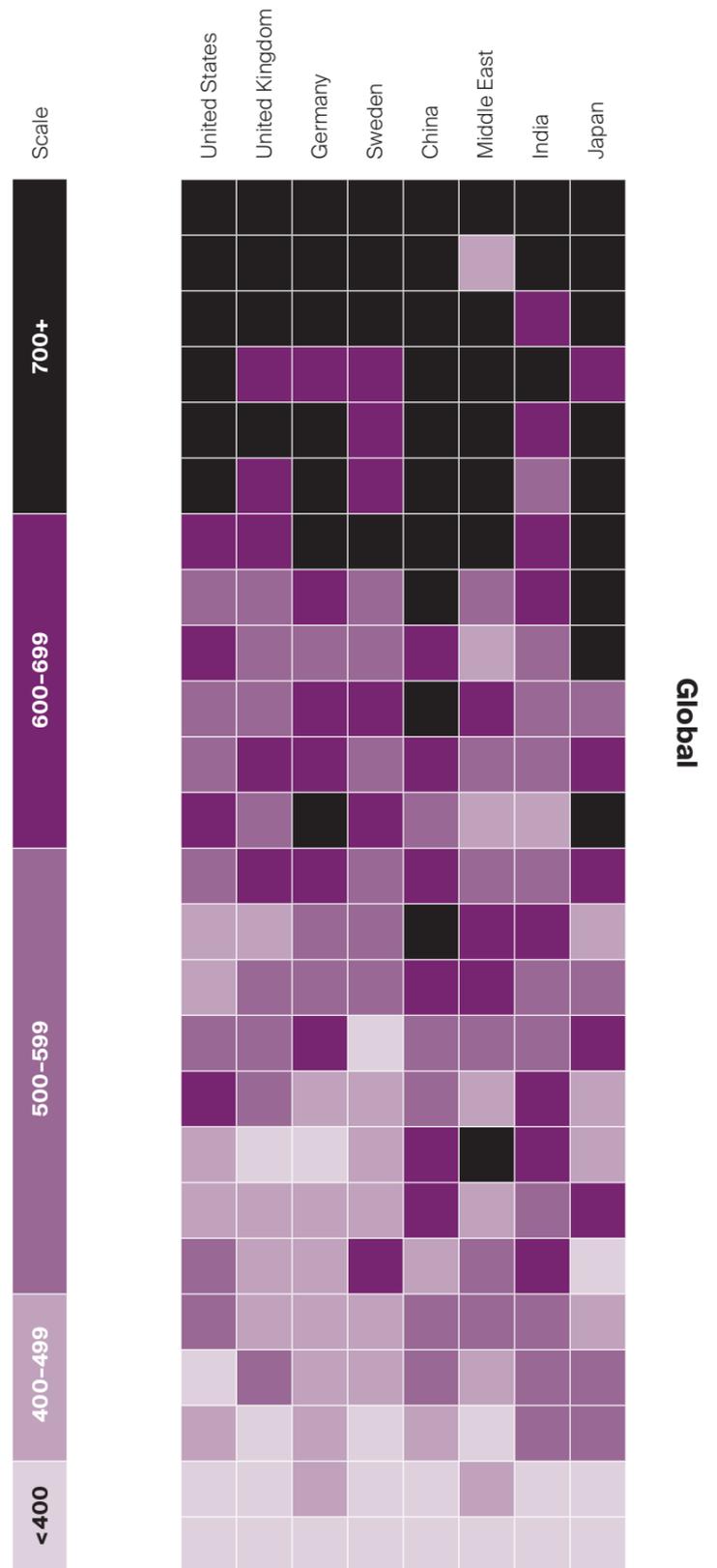
Industry comparison

How do industry scores compare across regions?

Global

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

Rank		Score
1	Internet search	950
2	Internet retail	780
3	Retail/Grocery	773
4	Electronics	740
5	Appliances	733
6	Restaurants	719
7	Retail/General	698
8	Retail/Fashion	640
9	Shipping/Mail	619
10	Media	615
11	Travel/Booking	605
12	Retail/Health & beauty	605
13	Travel/Hotels	597
14	Telecom/Cell phone	567
15	Travel/Air	560
16	Automotive	546
17	Banks/Retail	534
18	Social Media	527
19	Travel/Train	510
20	Utilities	506
21	Fitness	487
22	Telecom/Cable	486
23	Travel/Car rental	429
24	Health insurance	336
25	General insurance	269



Brand Rankings

Global

Brand	Industry	Rank
1 Aldi	Retail/Grocery	N/C
2 Lidl	Retail/Grocery	↑1
3 Google	Internet search	↓1
4 Netflix	Media	N/C
5 IKEA	Retail/General	↑2
6 Amazon	Internet retail	↑9
7 KFC	Restaurants	↑3
8 YouTube	Social media	N/C
9 McDonald's	Restaurants	↓4
10 SUBWAY	Restaurants	N/A
11 Burger King	Restaurants	↓5
12 Hilton	Travel/Hotels	↑50
13 Pizza Hut	Restaurants	↑11
14 Carrefour	Retail/Grocery	↑7
15 Hyundai	Automotive	N/A
16 Sephora	Retail/Health & beauty	↑44
17 Miele	Appliances	↑11
18 H&M	Retail/Fashion	↑11
19 Lenovo	Electronics	↑14
20 Samsung	Electronics	↓9
21 UNIQLO	Retail/Fashion	N/A
22 Expedia	Travel/Booking	↑8
23 Sony	Electronics	↓7
24 Ford	Automotive	↓7

Brand	Industry	Rank
25 LG	Electronics	↓11
26 Honda	Automotive	N/A
27 Philips	Electronics	↓7
28 eBay	Internet retail	↓19
29 Toyota	Automotive	↑20
30 Bosch	Appliances	↑11
31 ZARA	Retail/Fashion	↑1
32 HP	Electronics	↓7
33 Bing	Internet search	↑1
34 Nike	Fitness	↑3
35 Adidas	Fitness	↑1
36 Enterprise	Travel/Car rental	N/A
37 easyJet	Travel/Air	↑16
38 Panasonic	Electronics	↓11
39 Gap	Retail/Fashion	↑13
40 Boots	Retail/Health & beauty	↑17
41 Nokia	Electronics	↓19
42 Starbucks	Restaurants	↓2
43 Best Western	Travel/Hotels	N/C
44 Apple	Electronics	↓13
45 HTC	Electronics	↑11
46 Volkswagen	Automotive	↓4
47 Walmart	Retail/General	↓34
48 Nationwide	General insurance	N/A

Brand	Industry	Rank
49 Yahoo!	Internet search	↓37
50 Ramada	Travel/Hotels	N/A
51 Groupon	Internet retail	↓32
52 Canon	Electronics	↓29
53 O2	Telecom/Cell phone	↑15
54 Dell	Electronics	↓28
55 Instagram	Social media	↓1
56 Holiday Inn	Travel/Hotels	↓18
57 Marriott	Travel/Hotels	↓12
58 Marks & Spencer	Retail/General	↓19
59 Mercedes-Benz	Automotive	↓15
60 Audi	Automotive	↑6
61 Puma	Fitness	↑10
62 Skype	Telecom/Cell phone	↓14
63 Microsoft	Electronics	↓28
64 Lufthansa	Travel/Air	↓5
65 Norwegian Air	Travel/Air	N/A
66 iTunes	Internet retail	↑1
67 Twitter	Social media	↑9
68 FedEx	Shipping/Mail	↓7
69 Toshiba	Electronics	N/A
70 Reebok	Fitness	↓20
71 Haier	Appliances	↓13
72 Sky	Telecom/Cable	↓17

Brand	Industry	Rank
73 Uber	Travel/Car rental	N/A
74 Topshop	Retail/Fashion	↑5
75 Nissan	Automotive	N/A
76 Siemens	Appliances	↓7
77 Vodafone	Telecom/Cell phone	↓4
78 UPS	Shipping/Mail	↓4
79 BMW	Automotive	↓14
80 Under Armour	Fitness	N/A
81 British Airways	Travel/Air	↓35
82 Facebook	Social media	↓19
83 Citibank	Banks/Retail	↓1
84 DHL	Shipping/Mail	↓14
85 Vattenfall	Utilities	N/A
86 Budget	Travel/Car rental	↓9
87 Ryanair	Travel/Air	↓2
88 HSBC	Banks/Retail	↓8
89 Hertz	Travel/Car rental	↓8
90 Metlife	General insurance	N/A
91 Avis	Travel/Car rental	↓8
92 LinkedIn	Social media	↓14
93 Bupa	Health insurance	↓7
94 Aviva	General insurance	N/A
95 AXA	General insurance	↓8

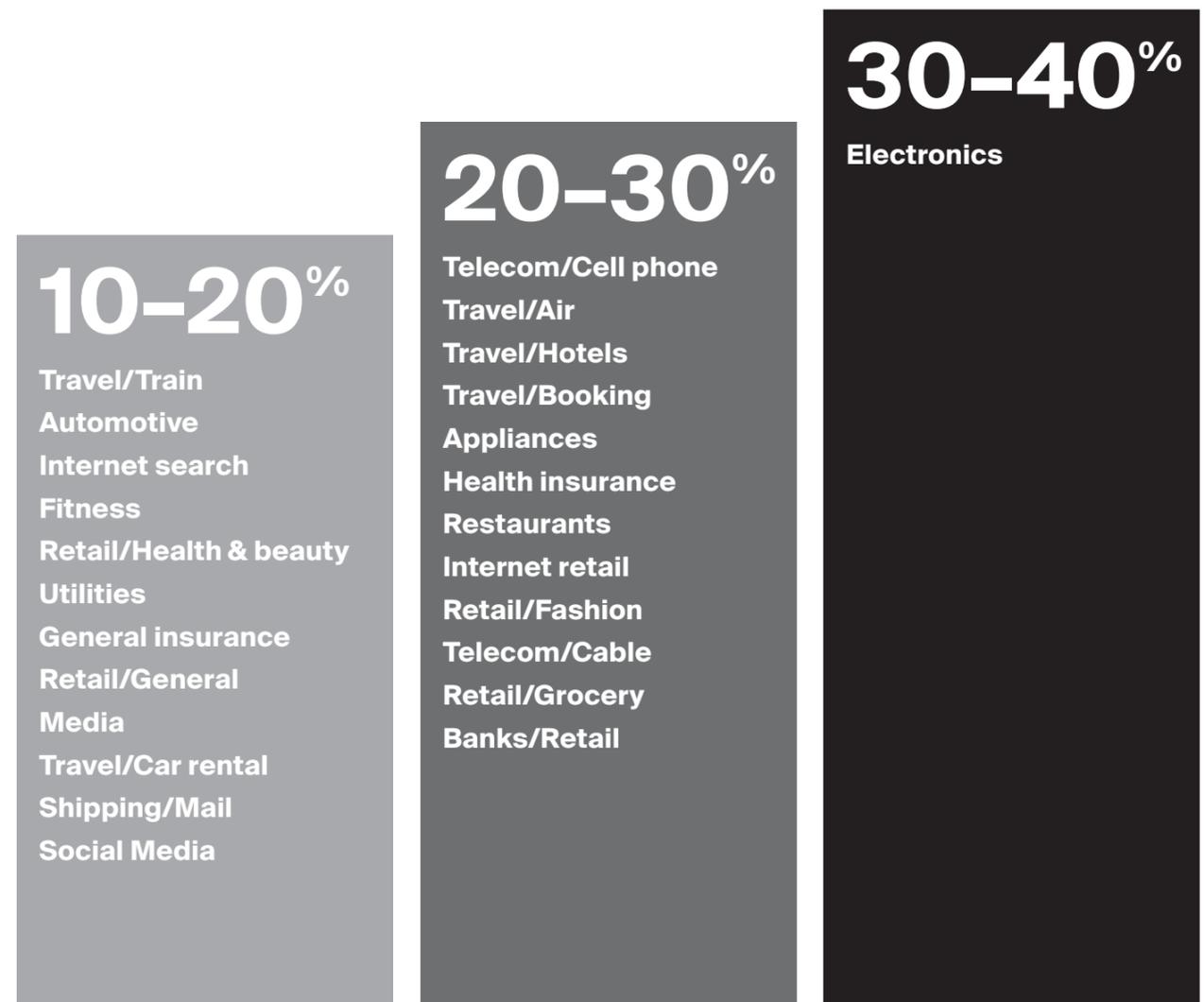
Global

Simplicity premium

64%

of consumers are willing to pay more for simpler experiences

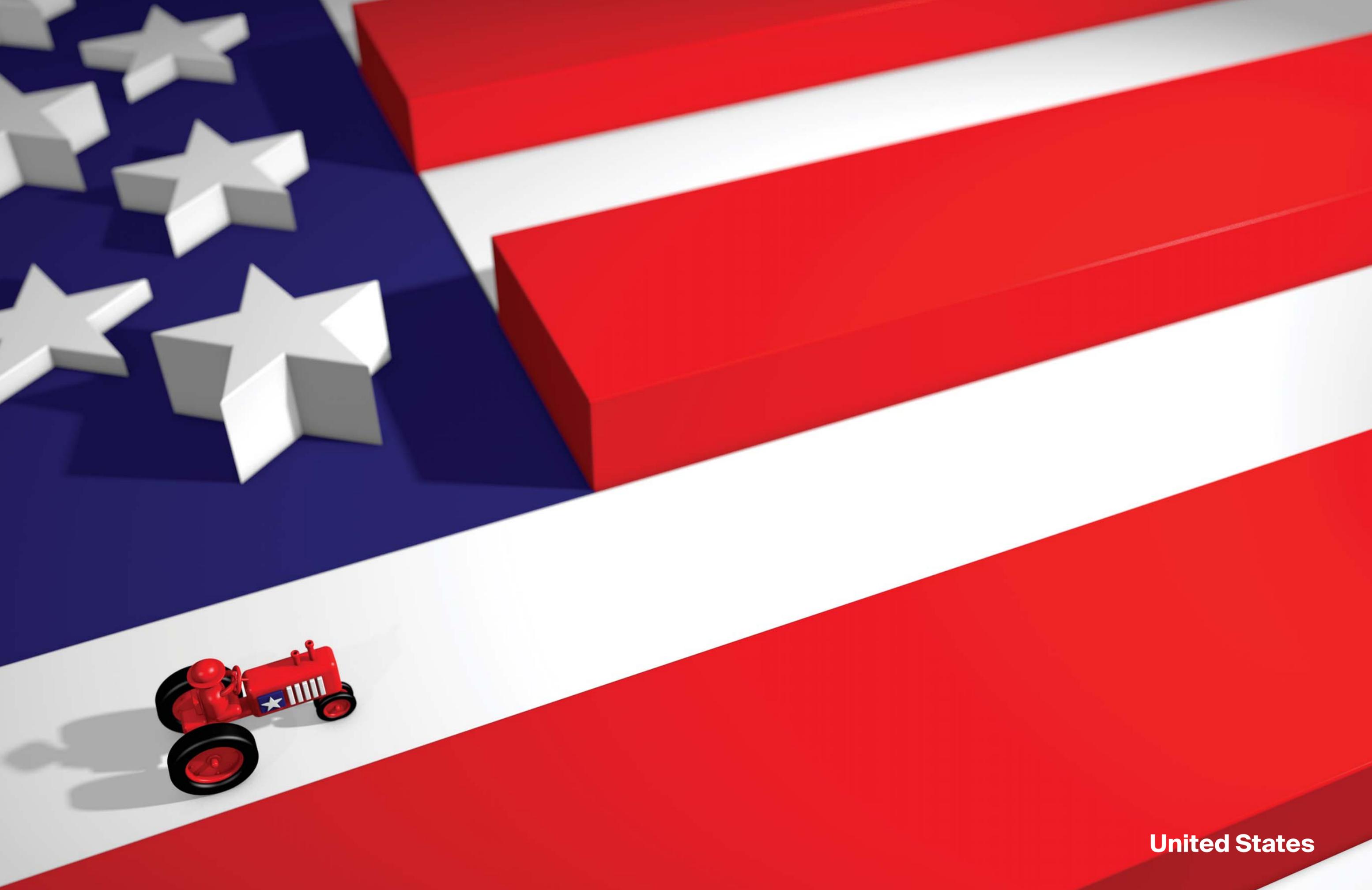
The percentage of consumers willing to pay more for simpler experiences varies by industry:



Results by region

Page

26	United States
34	United Kingdom
42	Germany
50	Sweden
58	China
66	Middle East
74	India
82	Japan



United States

United States

Industry Rankings

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

Brand Rankings

United States

BRAND	INDUSTRY	RANK CHG
1 Google	Internet search	N/C
2 Netflix	Media	N/C
3 Zappos.com	Internet retail	↑3
4 Amazon	Internet retail	N/C
5 Amazon Prime	Media	N/A
6 Dunkin' Donuts	Restaurants	↑1
7 McDonald's	Restaurants	↑7
8 Trader Joe's	Retail/Grocery	↑11
9 Pandora	Internet retail	N/A
10 SUBWAY	Restaurants	N/A
11 KFC	Restaurants	↓2
12 USPS	Shipping/Mail	↑49
13 Costco	Retail/General	N/A
14 Pizza Hut	Restaurants	↓4
15 Burger King	Restaurants	↓7
16 Southwest Airlines	Travel/Air	↑18
17 Subaru	Automotive	N/A
18 IKEA	Retail/General	↑48
19 Kroger	Retail/Grocery	↑1
20 Publix	Retail/Grocery	↓17
21 FedEx	Shipping/Mail	↑19
22 Chipotle	Restaurants	↓17
23 Whole Foods Market	Retail/Grocery	↑5
24 Starbucks	Restaurants	↓11
25 Sephora	Retail/Health & beauty	↑19
26 KAYAK	Travel/Booking	↓9
27 UPS	Shipping/Mail	↓6
28 Target	Retail/General	↓1
29 Walgreens	Retail/Health & beauty	↑14
30 Apple	Electronics	↓12
31 H&M	Retail/Fashion	↑7
32 Levi's	Retail/Fashion	↓2
33 Walmart	Retail/General	↓4

BRAND	INDUSTRY	RANK CHG
34 Craigslist	Internet retail	↑8
35 Groupon	Internet retail	↓23
36 Albertsons	Retail/Grocery	↑18
37 iTunes	Internet retail	↑33
38 Comfort Inn	Travel/Hotels	↑22
39 Old Navy	Retail/Fashion	↓28
40 Maytag	Appliances	↓25
41 Sony	Electronics	↓16
42 Toyota	Automotive	↑15
43 Rite Aid Pharmacy	Retail/Health & beauty	↑16
44 Victoria's Secret	Retail/Fashion	↓3
45 Ford	Automotive	↓21
46 YouTube	Social media	↓24
47 Samsung	Electronics	↓31
48 Honda	Automotive	↓25
49 Yahoo!	Internet search	↓18
50 PayPal	Banks/Retail	N/A
51 eBay	Internet retail	↓3
52 Bing	Internet search	↓6
53 Kohl's	Retail/General	N/A
54 Pinterest	Social media	↓4
55 Adidas	Fitness	↑14
56 Marriott	Travel/Hotels	↑21
57 Dell	Electronics	↑6
58 Safeway	Retail/Grocery	↓21
59 Holiday Inn	Travel/Hotels	↓26
60 Dodge	Automotive	↓24
61 CVS/pharmacy	Retail/Health & beauty	↓26
62 GE	Appliances	↑2
63 JetBlue Airways	Travel/Air	↑13
64 Canon	Electronics	↑19
65 GEICO	General insurance	↓10
66 Whirlpool	Appliances	↓15

BRAND	INDUSTRY	RANK CHG
67 Days Inn	Travel/Hotels	↑21
68 Nike	Fitness	↓42
69 The Wall Street Journal	Media	↑21
70 USA Today	Media	↑8
71 Under Armour	Fitness	N/A
72 HP	Electronics	↓40
73 Gap	Retail/Fashion	↓6
74 Yelp	Social media	↓2
75 Expedia	Travel/Booking	↓19
76 T-Mobile	Telecom/Cell phone	↑28
77 Hilton	Travel/Hotels	↑8
78 Macy's	Retail/General	↓26
79 Hyundai	Automotive	N/A
80 Panasonic	Electronics	↓33
81 Fox News	Media	↑22
82 Amtrak	Travel/Train	↑7
83 Instagram	Social media	↓34
84 Best Western	Travel/Hotels	↓2
85 Kmart	Retail/General	↓27
86 Enterprise	Travel/Car rental	↑6
87 DISH Network	Telecom/Cable	↑31
88 Chevrolet	Automotive	↓35
89 Ramada	Travel/Hotels	↓24
90 Microsoft	Electronics	↓19
91 Chase	Banks/Retail	↓10
92 Reebok	Fitness	↓53
93 Citibank	Banks/Retail	↑2
94 Twitter	Social media	↓3
95 Priceline.com	Travel/Booking	↓22
96 Sprint	Telecom/Cell phone	↑15
97 AllState	General insurance	↑9
98 Progressive	General insurance	↓53
99 MSNBC	Media	↑3

BRAND	INDUSTRY	RANK CHG
100 CNN	Media	↓4
101 Kaiser Permanente	Health insurance	N/A
102 The New York Times	Media	↓18
103 Skype	Telecom/Cell phone	↓41
104 State Farm	General insurance	↓25
105 Orbitz	Travel/Booking	↓31
106 Hertz	Travel/Car rental	↓12
107 Budget	Travel/Car rental	↓7
108 Farmers	General insurance	↑9
109 Bank of America	Banks/Retail	↓23
110 Nationwide	General insurance	↓23
111 Avis	Travel/Car rental	↓14
112 US Airways	Travel/Air	↑1
113 American Airlines	Travel/Air	↑2
114 Verizon	Telecom/Cell phone	N/C
115 Wells Fargo	Banks/Retail	↓17
116 Alamo	Travel/Car rental	↓9
117 AT&T	Telecom/Cell phone	↓5
118 Delta Air Lines	Travel/Air	↓9
119 United/Continental	Travel/Air	↓14
120 HUMANA	Health insurance	↑3
121 Facebook	Social media	↓20
122 LinkedIn	Social media	↓14
123 MetLife	General insurance	↓13
124 DIRECTV	Telecom/Cable	↓8
125 Aetna	Health insurance	↓6
126 CIGNA	Health insurance	↓5
127 Comcast	Telecom/Cable	↓3
128 Time Warner Cable	Telecom/Cable	↓6
129 UnitedHealthcare	Health insurance	↓9

United States

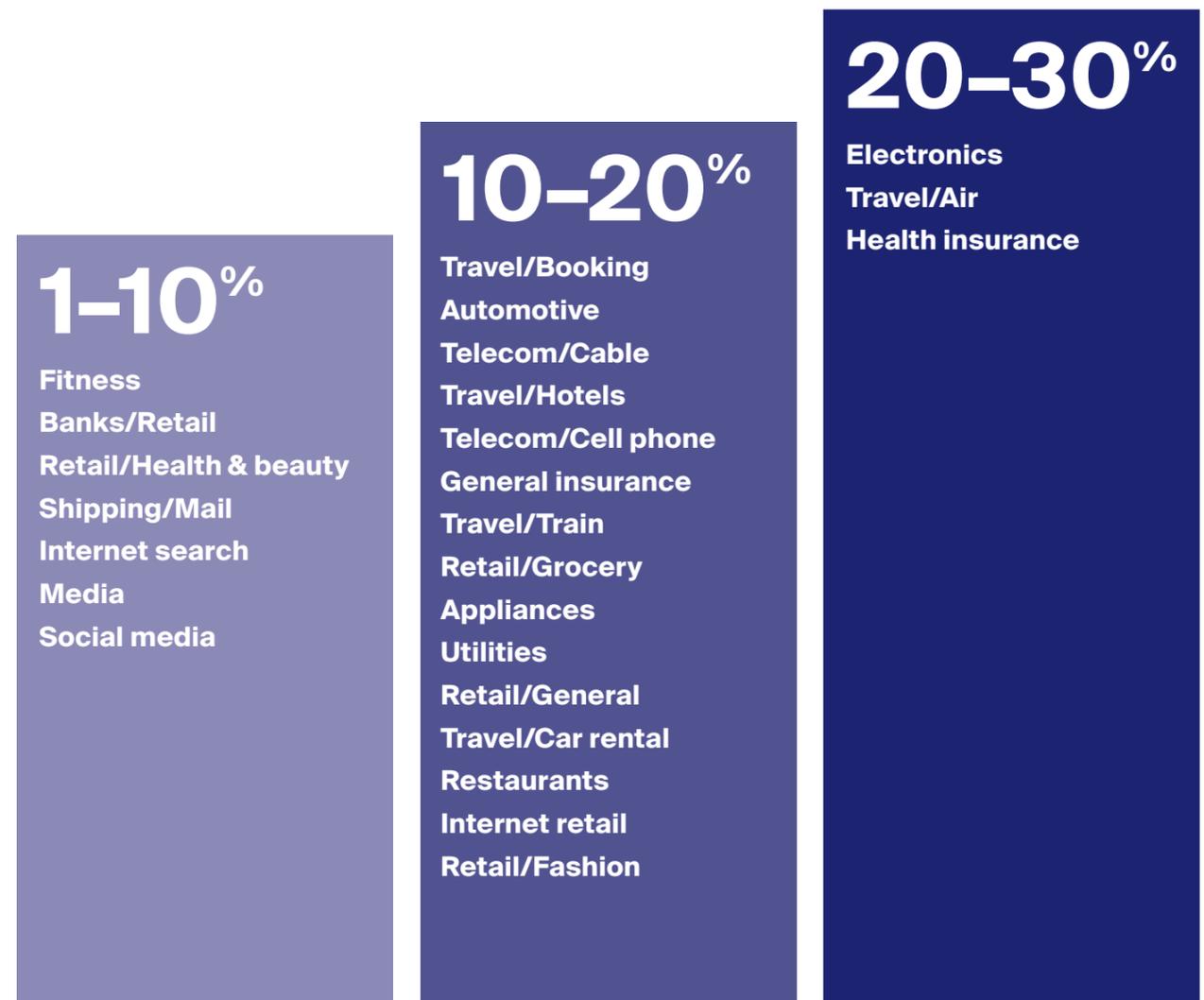
Simplicity premium

46%

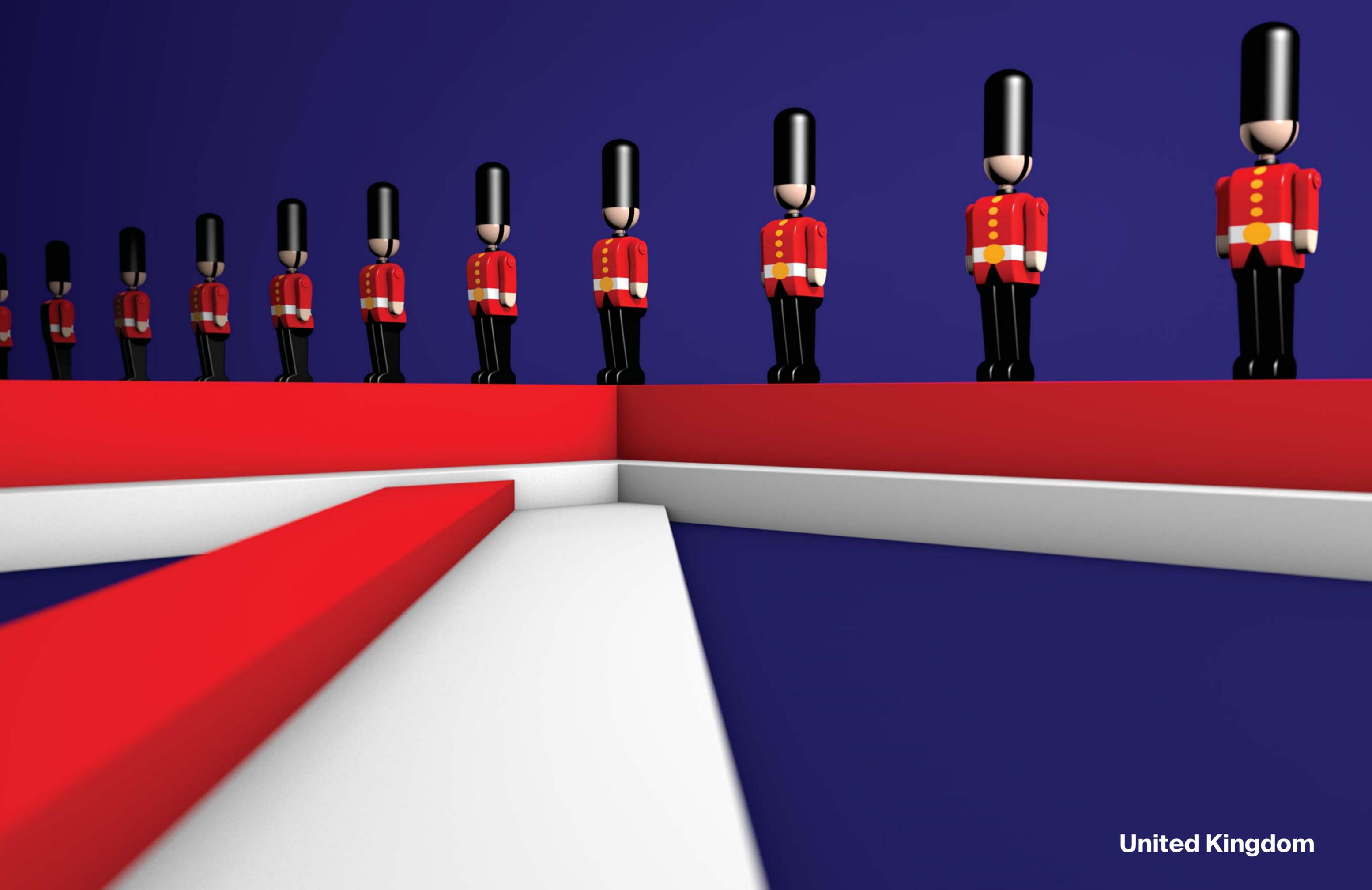
of consumers are willing to pay more for simpler experiences

United States

The percentage of consumers willing to pay more for simpler experiences varies by industry:



United States



United Kingdom

United Kingdom

Industry Rankings

1 Internet search

2 Internet retail

3 Retail/Grocery

4 Appliances

5 Electronics

6 Restaurants

7 Retail/General

8 Travel/Hotels

9 Travel/Booking

10 Retail/Fashion

11 Shipping/Mail

12 Banks/Retail

13 Automotive

14 Retail/Health & beauty

15 Media

16 Travel/Air

17 Telecom/Cable

18 Telecom/Cell phone

19 Utilities

20 Fitness

21 Travel/Train

22 Social media

23 Travel/Car rental

24 General insurance

25 Health insurance

Brand Rankings

United Kingdom

BRAND	INDUSTRY	RANK CHG
1 Amazon	Internet retail	↑9
2 Google	Internet search	N/C
3 Lidl	Retail/Grocery	↓2
4 First Direct	Banks/Retail	↑29
5 John Lewis	Retail/General	↑13
6 Aldi	Retail/Grocery	↓3
7 McDonald's	Restaurants	N/A
8 Nandos	Restaurants	N/A
9 Booking.com	Travel/Booking	N/A
10 Premier Inn	Travel/Hotels	↓6
11 Moneysupermarket	Internet search	N/A
12 Travelodge	Travel/Hotels	↓1
13 IKEA	Retail/General	N/C
14 Pizza Express	Restaurants	N/A
15 Comparethemarket	Internet search	N/A
16 Asda	Retail/Grocery	↓11
17 Superdrug	Retail/Health & beauty	↑7
18 Audi	Automotive	↑71
19 Tesco	Retail/Grocery	↓10
20 Netflix	Media	↓12
21 Waitrose	Retail/Grocery	↑2
22 Lastminute.com	Travel/Booking	↑26
23 Morrisons	Retail/Grocery	N/A
24 Travelzoo	Travel/Booking	N/A
25 Primark	Retail/Fashion	↑2
26 Pret a Manger	Restaurants	N/A
27 Trivago	Travel/Booking	N/A
28 Toyota	Automotive	↓2
29 Marks & Spencer	Retail/Grocery	↓15
30 Intercontinental	Travel/Hotels	↑20
31 The Co-operative Food	Retail/Grocery	↓9
32 Boots	Retail/Health & beauty	↓17
33 Mercedes-Benz	Automotive	↑26

BRAND	INDUSTRY	RANK CHG
34 Ford	Automotive	↓15
35 Burger King	Restaurants	↓23
36 eBay	Internet retail	↓20
37 Sainsbury's	Retail/Grocery	↓31
38 Expedia	Travel/Booking	↑9
39 H&M	Retail/Fashion	↑7
40 KFC	Restaurants	↓23
41 Royal Mail	Shipping/Mail	↑4
42 The Sun	Media	↓8
43 Volkswagen	Automotive	↑20
44 Starbucks	Restaurants	↓1
45 ITV	Media	N/A
46 Hilton	Travel/Hotels	↑26
47 Puma	Fitness	↑44
48 Samsung	Electronics	↓28
49 Nationwide	Banks/Retail	↑16
50 NatWest	Banks/Retail	↑3
51 Daily Mail	Media	N/A
52 Sony	Electronics	↓27
53 O2	Telecom/Cell phone	↑4
54 Holiday Inn	Travel/Hotels	↓14
55 Direct Line	General insurance	↑37
56 Virgin Atlantic	Travel/Air	↓27
57 Apple	Electronics	↑14
58 DHL	Shipping/Mail	↑19
59 GoCompare	Internet search	N/A
60 Channel 4	Media	↓32
61 Nike	Fitness	↑26
62 Virgin Money	Banks/Retail	↓10
63 TSB	Banks/Retail	↓12
64 LV	General insurance	↑11
65 Guardian	Media	↓23
66 LG	Electronics	↓28

BRAND	INDUSTRY	RANK CHG
67 Enterprise	Travel/Car rental	N/A
68 Instagram	Social media	↓1
69 UNIQLO	Retail/Fashion	N/A
70 British Airways	Travel/Air	↓38
71 Philips	Electronics	↓3
72 Nokia	Electronics	↑4
73 YouTube	Social media	↓52
74 Panasonic	Electronics	↓37
75 easyJet	Travel/Air	↓40
76 More Than	General insurance	↑22
77 Topshop	Retail/Fashion	↑7
78 Santander	Banks/Retail	↓16
79 ZARA	Retail/Fashion	↓24
80 Lufthansa	Travel/Air	↑14
81 Reebok	Fitness	↓15
82 Turkish Airlines	Travel/Air	N/A
83 The Financial Times	Media	↑24
84 Adidas	Fitness	↓14
85 BBC	Media	↓41
86 HP	Electronics	↓25
87 The Co-operative Bank	Banks/Retail	↑17
88 Gap	Retail/Fashion	↓9
89 UPS	Shipping/Mail	↑16
90 BMW	Automotive	↓9
91 FedEx	Shipping/Mail	↓8
92 iTunes	Internet retail	↓6
93 Lloyds Bank	Banks/Retail	↓8
94 HSBC	Banks/Retail	↓6
95 Skype	Telecom/Cell phone	↑2
96 Twitter	Social media	↑15
97 Norwegian Air	Travel/Air	N/A
98 Dell	Electronics	↓38
99 Churchill	General insurance	↓26

BRAND	INDUSTRY	RANK CHG
100 Ryanair	Travel/Air	↓7
101 Sky	Telecom/Cable	↓32
102 Virgin Media	Telecom/Cable	↓20
103 IBM	Electronics	N/A
104 Vodafone	Telecom/Cell phone	↑5
105 E.ON	Utilities	↑17
106 EE (Everything Everywhere)	Telecom/Cell phone	↑2
107 Microsoft	Electronics	↓4
108 Three	Telecom/Cell phone	↓54
109 The Times	Media	↓51
110 British Gas	Utilities	↑7
111 Barclays	Banks/Retail	↓15
112 Avis	Travel/Car rental	↑6
113 Hertz	Travel/Car rental	↑2
114 RBS	Banks/Retail	↓1
115 SSE (Scottish and Southern Energy)	Utilities	↑6
116 Bupa	Health insurance	↓2
117 Facebook	Social media	↓22
118 LinkedIn	Social media	↑1
119 Legal & General	General insurance	N/A
120 Aviva	Health insurance	↓8
121 ScottishPower	Utilities	↑3
122 EDF Energy	Utilities	↑1
123 TalkTalk	Telecom/Cell phone	↓7
124 BT	Telecom/Cable	↓22
125 npower	Utilities	↓5
126 AXA PPP Healthcare	Health insurance	↓1

United Kingdom

Simplicity premium

45%

of consumers are willing to pay more for simpler experiences

United Kingdom

The percentage of consumers willing to pay more for simpler experiences varies by industry:



United Kingdom



Germany

Germany

Industry Rankings

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

Brand Rankings

Germany

BRAND	INDUSTRY	RANK CHG
1 Amazon	Internet retail	↑8
2 Google	Internet search	↓1
3 McDonald's	Restaurants	↑15
4 Aldi	Retail/Grocery	↓2
5 Tchibo	Retail/Grocery	↓2
6 Lidl	Retail/Grocery	↓1
7 DM	Retail/Health & beauty	↑1
8 Edeka	Retail/Grocery	↓2
9 IKEA	Retail/General	↓5
10 BILD	Media	↑2
11 Rossmann	Retail/Health & beauty	↑4
12 Burger King	Restaurants	↑28
13 H&M	Retail/Fashion	↑3
14 Miele	Appliances	↑8
15 REWE	Retail/Grocery	↑10
16 KIK	Retail/Fashion	↑15
17 KFC	Restaurants	↑37
18 C&A	Retail/Fashion	↑10
19 Budnikowsky	Retail/Health & beauty	↓12
20 Nordsee	Restaurants	↑17
21 Real	Retail/Grocery	↓2
22 BonPrix	Retail/Fashion	↓8
23 Douglas	Retail/Health & beauty	↓2
24 Audi	Automotive	↓1
25 Zalando	Internet retail	↓14
26 OTTO	Internet retail	↓6
27 YouTube	Social media	↑17
28 Media Markt	Retail/General	↓4
29 Mercedes-Benz	Automotive	↑10
30 Thomas Cook	Travel/Booking	↑61
31 Müller	Retail/Health & beauty	↑3
32 Vapiano	Restaurants	↑31
33 Kaufhof	Retail/General	↑15

BRAND	INDUSTRY	RANK CHG
34 Bosch	Appliances	↓5
35 SUBWAY	Restaurants	N/A
36 Saturn	Retail/General	↓4
37 ZARA	Retail/Fashion	↑1
38 Opel	Automotive	↑7
39 Sony	Electronics	↑3
40 eBay	Internet retail	↓23
41 Adidas	Fitness	↑32
42 Toyota	Automotive	N/A
43 EP/Elektronik Partner	Retail/General	↑3
44 Philips	Electronics	↑8
45 Holiday Inn	Travel/Hotels	↑6
46 Ford	Automotive	↓20
47 AEG	Appliances	↓6
48 Panasonic	Electronics	↑14
49 Europcar	Travel/Car rental	↑49
50 Samsung	Electronics	↓23
51 SAT 1	Media	↑13
52 Hilton	Travel/Hotels	↑6
53 ING-DiBa	Banks/Retail	↑13
54 Best Western	Travel/Hotels	↑7
55 Canon	Electronics	↓2
56 Vox	Media	↑3
57 TUI	Travel/Booking	↑12
58 Nike	Fitness	↓2
59 BMW	Automotive	↓23
60 ProSieben	Media	↓3
61 Volkswagen	Automotive	↓48
62 RTL	Media	↓7
63 LG	Electronics	↓14
64 Siemens	Electronics	↓29
65 easyJet	Travel/Air	↑28
66 Alltours	Travel/Booking	N/A

BRAND	INDUSTRY	RANK CHG
67 Hermes	Shipping/Mail	↑5
68 Skype	Telecom/Cell phone	↑7
69 Puma	Fitness	↑1
70 MEDIMAX	Retail/General	↓23
71 Volksbanken Raiffeisenbanken	Banks/Retail	↑13
72 Lufthansa	Travel/Air	↑4
73 Bayer	Retail/Health & beauty	↑13
74 Nokia	Electronics	↓24
75 Yahoo!	Internet search	↓42
76 Deutsche Post	Shipping/Mail	↑7
77 Techniker Krankenkasse	Health insurance	N/C
78 Apple	Electronics	↓35
79 Spiegel	Media	↓5
80 Reebok	Fitness	↑2
81 airberlin	Travel/Air	N/C
82 Ramada	Travel/Hotels	N/A
83 HP	Electronics	↓15
84 Marriott	Travel/Hotels	↓19
85 DER	Travel/Booking	N/A
86 Sky	Media	↓7
87 Sparkasse	Banks/Retail	↑2
88 Eurowings	Travel/Air	N/A
89 AOK	Health insurance	↓1
90 Microsoft	Electronics	↓12
91 Sixt	Travel/Car rental	↓11
92 Germanwings	Travel/Air	N/C
93 iTunes	Internet retail	↓22
94 Google+	Social media	↑10
95 eplus	Telecom/Cell phone	↓10
96 BARMER GEK	Health insurance	↓9
97 Commerzbank	Banks/Retail	↑4
98 Dell	Electronics	↓31
99 Deutsche Postbank	Banks/Retail	↓9

BRAND	INDUSTRY	RANK CHG
100 O2	Telecom/Cell phone	↓5
101 Twitter	Social media	↑1
102 UPS	Shipping/Mail	↑1
103 Vattenfall	Utilities	↓7
104 HypoVereinsbank	Banks/Retail	N/A
105 TARGOBANK	Banks/Retail	↑2
106 FedEx	Shipping/Mail	N/A
107 Bing	Internet search	↓77
108 Vodafone	Telecom/Cell phone	↓11
109 AXA	General insurance	↑2
110 Deutsche Bank	Banks/Retail	↑4
111 R+V Versicherung	General insurance	↑1
112 Facebook	Social media	↓7
113 Hertz	Travel/Car rental	↓14
114 Avis	Travel/Car rental	↓20
115 Xing	Social media	↓9
116 RWE	Utilities	↓16
117 Ryanair	Travel/Air	↓8
118 Deutsche Telekom	Telecom/Cell phone	↓10
119 ERGO	General insurance	↓1
120 Allianz	General insurance	↓5
121 Wüstenrot	General insurance	↓8
123 Deutsche Bahn	Travel/Train	↓7
124 Generali	General insurance	↓7

Germany

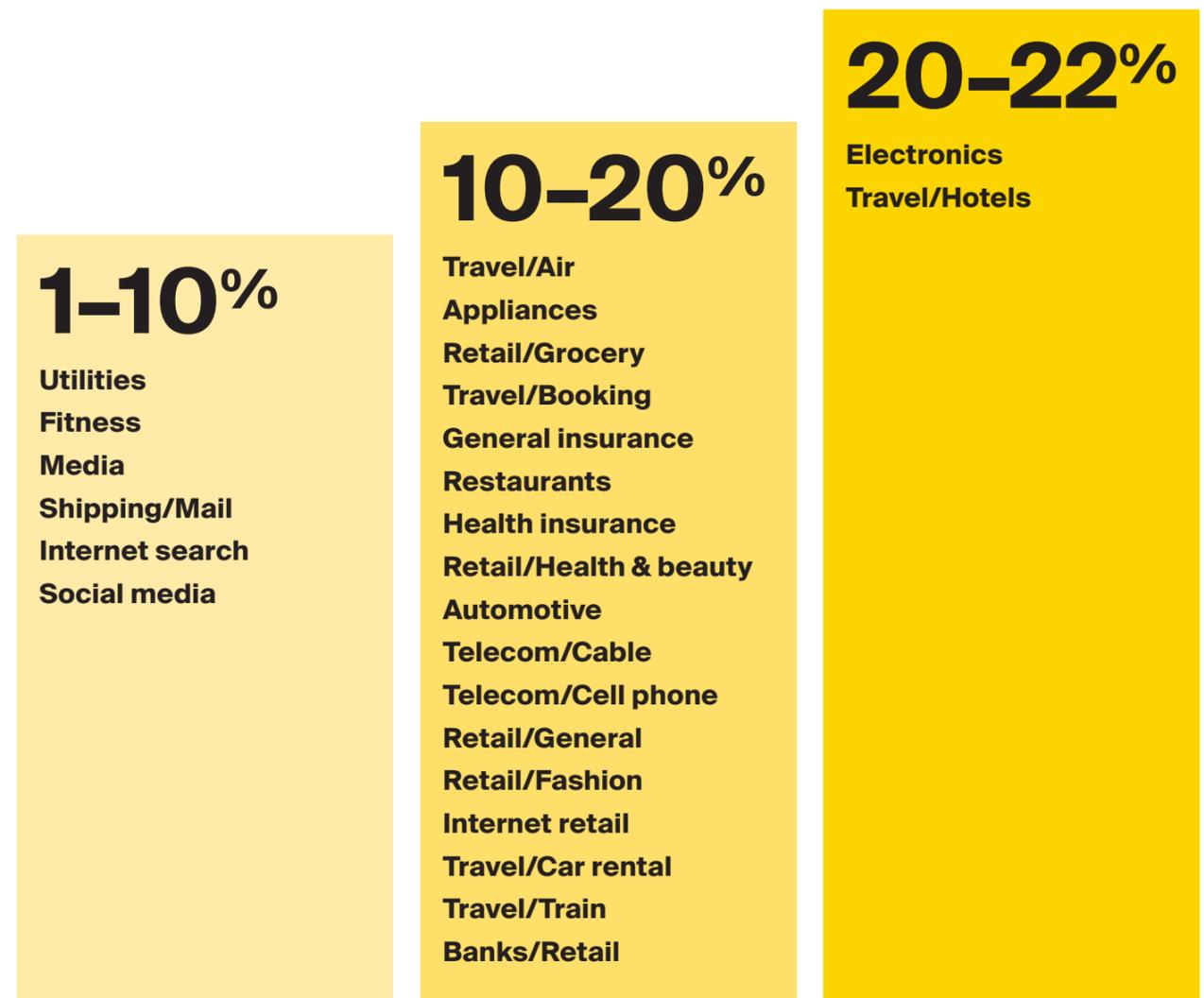
Simplicity premium

48%

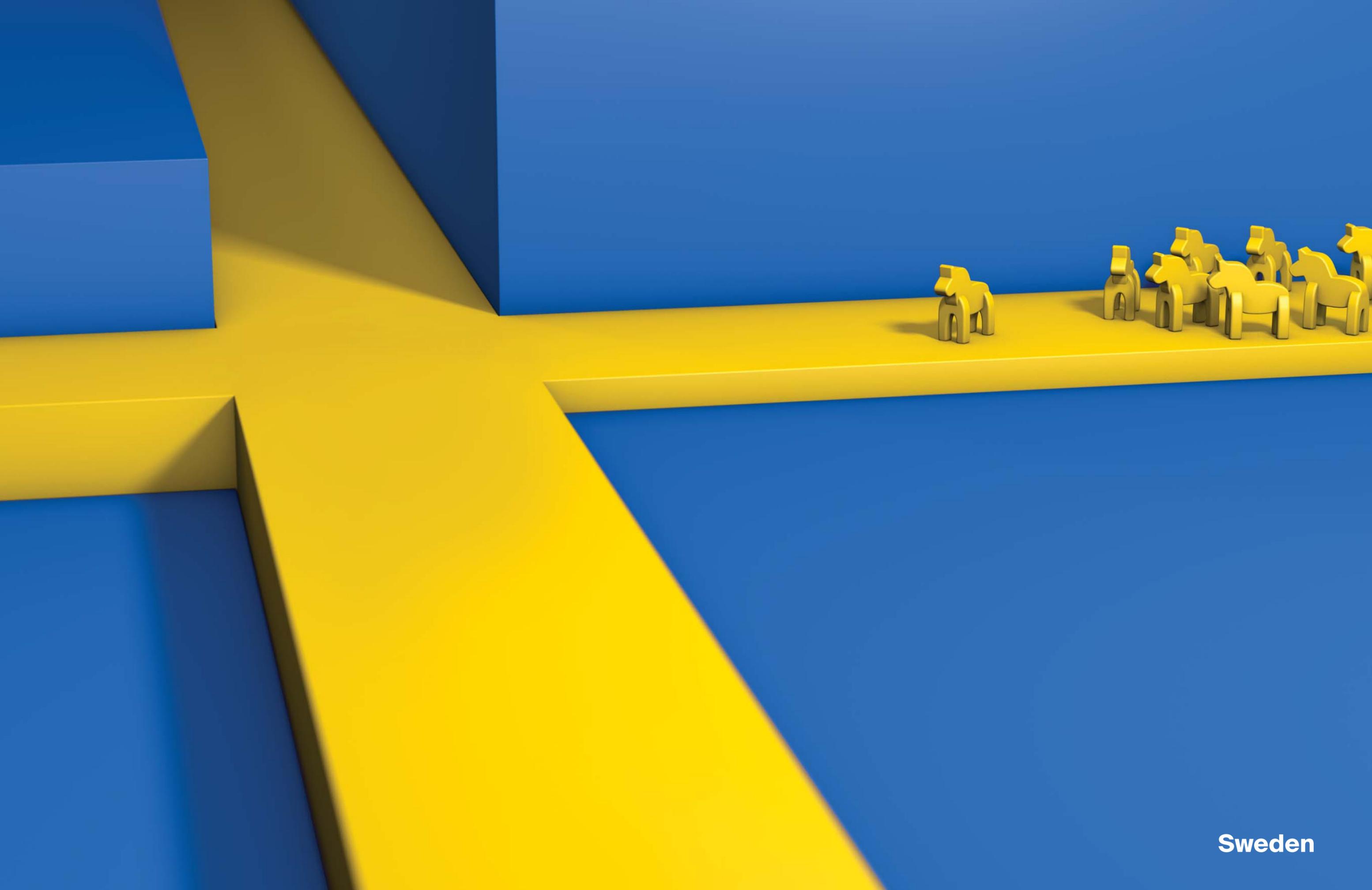
of consumers are willing to pay more for simpler experiences

Germany

The percentage of consumers willing to pay more for simpler experiences varies by industry:



Germany



Sweden

Sweden

Industry Rankings

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

Brand Rankings

Sweden

	BRAND	INDUSTRY	RANK CHG
1	IKEA	Retail/General	N/C
2	Google	Internet search	N/C
3	ICA	Retail/Grocery	↑1
4	Blocket	Internet retail	↓1
5	Clas Ohlson	Retail/General	N/C
6	Willys	Retail/Grocery	↑8
7	Max Burgers	Restaurants	↑13
8	Lindex	Retail/Fashion	↑18
9	Lidl	Retail/Grocery	↑2
10	Adlibris	Internet retail	N/A
11	Burger King	Restaurants	↑4
12	Apoteket	Retail/Health & beauty	N/C
13	Netto	Retail/Grocery	↑8
14	Åhléns	Retail/General	↑4
15	Coop	Retail/Grocery	↓7
16	Fritidsresor	Travel/Booking	↓7
17	H&M	Retail/Fashion	↑8
18	Aftonbladet	Media	↑21
19	McDonald's	Restaurants	↓12
20	Tradera	Internet retail	↑8
21	Hemköp	Retail/Grocery	↑9
22	YouTube	Social media	↓3
23	Netflix	Media	↓17
24	DesignTorget	Retail/General	N/A
25	ST1.se	Retail/General	N/A
26	Expressen	Media	↑7
27	Spotify	Media	↓4
28	KappAhl	Retail/Fashion	↑14
29	Life	Retail/Health & beauty	↓12
30	nelly.com	Internet retail	↑6
31	cdon	Internet retail	↓15
32	SUBWAY	Restaurants	N/A
33	Samsung	Electronics	↑2

	BRAND	INDUSTRY	RANK CHG
34	Pizza Hut	Restaurants	↑46
35	Kronans Apotek	Retail/Health & beauty	↓4
36	Volvo	Automotive	↓12
37	Nordic Choice Hotels	Travel/Hotels	↑13
38	Gina Tricot	Retail/Fashion	↑2
39	Goeteborgs-Posten	Media	↓7
40	Statoil	Utilities	↓3
41	Scandic Hotels	Travel/Hotels	↓14
42	Apollo	Travel/Booking	↓20
43	Synoptik	Retail/Health & beauty	N/A
44	Viaplay	Media	↓31
45	Nokia	Electronics	↓2
46	Fazer	Retail/Grocery	N/A
47	Comviq	Telecom/Cell phone	↑1
48	Apotek Hjärtat	Retail/Health & beauty	↓19
49	OKQ8	Travel/Air	N/A
50	Comfort Hotels	Travel/Hotels	↑12
51	Cylinda	Appliances	↑22
52	Ticnet	Travel/Booking	↑3
53	Ving	Travel/Booking	↓43
54	Sony	Electronics	↓20
55	Skype	Telecom/Cell phone	↑8
56	SEB	Banks/Retail	↑31
57	Audi	Automotive	↑8
58	Electrolux	Appliances	↓5
59	Husqvarna	Appliances	N/A
60	Tele2	Telecom/Cell phone	↑6
61	Norwegian Air	Travel/Air	↑7
62	Miele	Appliances	↑2
63	Apple	Electronics	↓18
64	Lloyds Apotek	Retail/Health & beauty	N/A
65	MQ	Retail/Fashion	↑14
66	Dagens Nyheter	Media	↓25

	BRAND	INDUSTRY	RANK CHG
67	Länsförsäkringar	General insurance	N/C
68	Budget	Travel/Car rental	N/A
69	Puma	Fitness	↑15
70	Bonnier	Media	N/C
71	ViaSat	Media	↓15
72	Volkswagen	Automotive	↓15
73	Stor och Liten	Retail/General	N/A
74	AvanzaBank	Banks/Retail	N/A
75	Nike	Fitness	↓17
76	Twitter	Social media	↑34
77	Instagram	Social media	↑6
78	SAS	Travel/Air	↓32
79	Best Western	Travel/Hotels	↓20
80	Bosch	Appliances	↓4
81	Posten (Postnord)	Shipping/Mail	↓10
82	Saab	Automotive	↑17
83	Stena Line	Travel/Air	N/A
84	Starbucks	Restaurants	↓2
85	Adidas	Fitness	↓34
86	Ikano Bank	Banks/Retail	N/A
87	Reebok	Fitness	↓18
88	Facebook	Social media	↑1
89	Handelsbanken	Banks/Retail	↓35
90	Siemens	Appliances	↓12
91	TeliaSonera	Telecom/Cell phone	↑2
92	Bredbandsbolaget	Telecom/Cable	↑9
93	BMW	Automotive	N/A
94	Dell	Electronics	↓42
95	AGRIA Insurance	General insurance	↓9
96	Lufthansa	Travel/Air	↓58
97	Toyota	Automotive	↓5
98	First Hotels	Travel/Hotels	↓51
99	Com Hem	Telecom/Cable	↑8

	BRAND	INDUSTRY	RANK CHG
100	Radisson	Travel/Hotels	↓51
101	Canal Digital	Telecom/Cable	↑8
102	DHL	Shipping/Mail	↓41
103	Bring	Shipping/Mail	↑1
104	Folksam	General insurance	↓13
105	Vattenfall	Utilities	↓8
106	Hertz	Travel/Car rental	↑2
107	Schenker	Shipping/Mail	↓30
108	Telenor Sverige	Telecom/Cell phone	↓18
109	Trygg-Hansa	General insurance	↓11
110	Nordea Bank	Banks/Retail	↓25
111	E.ON Sverige	Utilities	↓6
112	Fortum	Utilities	↓1
113	Ericsson	Telecom/Cell phone	↓41
114	British Airways	Travel/Air	↓39
115	Skandia	General insurance	↓9
116	Swedbank	Banks/Retail	↓21
117	SJ	Travel/Train	↓3
118	MTG.com	Media	N/A
119	Danske Bank	Banks/Retail	↓17
120	Ryanair	Travel/Air	↓5
121	LinkedIn	Social media	↓9
122	AFA Sjuk	General insurance	↓19

Sweden

Simplicity premium

41%

of consumers
are willing
to pay more
for simpler
experiences

Sweden

The percentage of consumers willing to pay more for simpler experiences varies by industry:

1-10%

- Fitness
- Retail/Grocery
- Internet retail
- Travel/Car rental
- Automotive
- Appliances
- Retail/Fashion
- Shipping/Mail
- Retail/Health & beauty
- Internet search
- Retail/General
- Media
- Social media

10-20%

- Travel/Air
- Travel/Hotels
- Electronics
- Travel/Train
- Travel/Booking
- Health insurance
- Telecom/Cell phone
- Restaurants
- Telecom/Cable
- Banks/Retail
- General insurance
- Utilities

Sweden



China

China

Industry Rankings

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

Brand Rankings

China

	BRAND	INDUSTRY	RANK CHG
1	Hilton	Travel/Hotels	↑78
2	7-11	Retail/Health & beauty	N/A
3	RT-mart	Retail/Grocery	↑21
4	Septwolves	Retail/Fashion	N/A
5	Huawei	Electronics	↑7
6	Sephora	Retail/Health & beauty	↑86
7	KFC	Restaurants	N/C
8	IKEA	Retail/General	↑21
9	Vivo	Electronics	↑72
10	360	Internet search	N/A
11	Tongrentang	Retail/Health & beauty	↑71
12	Douban	Social media	↑62
13	S.F. Express	Shipping/Mail	↓11
14	JD.com	Internet retail	↑12
15	Southern Weekend	Media	↑84
16	Sogou	Internet search	↓10
17	Home Inns	Travel/Hotels	↑5
18	WeChat	Social media	↓7
19	Tmall.com	Internet retail	↓15
20	Alipay	Banks/Retail	↓10
21	McDonald's	Restaurants	↓16
22	Jinjiang Inns	Travel/Hotels	↑1
23	Marriott	Travel/Hotels	↑26
24	Xiaomi	Electronics	↓10
25	Lifeweek	Media	↑32
26	Hainan Airlines	Travel/Air	↑80
27	Adidas	Fitness	↑34
28	YTO Express	Shipping/Mail	↓3
29	7 Days Inn	Travel/Hotels	↓13
30	Spring Airlines	Travel/Air	↑61
31	Hisense	Appliances	↑22
32	Hyundai	Automotive	↑63
33	ZTO Express	Shipping/Mail	N/A

	BRAND	INDUSTRY	RANK CHG
34	Baidu	Internet search	↓31
35	Shanghai's Dragon Television	Media	N/A
36	Didi Kuaidi	Travel/Car rental	↑10
37	Shentong Express	Shipping/Mail	↓18
38	Sina	Media	↓21
39	Midea	Appliances	↓19
40	HLA	Retail/Fashion	N/A
41	Toyota	Automotive	↑59
42	Yunda Express	Shipping/Mail	↓10
43	Carrefour	Retail/Grocery	↓1
44	Haidilao Hot Pot	Restaurants	↓36
45	ZARA	Retail/Fashion	↓15
46	OPPO	Electronics	↓33
47	Geely	Automotive	↑70
48	GOME	Retail/General	↑4
49	True Kungfu	Restaurants	N/A
50	UNIQLO	Retail/Fashion	↑17
51	361 Degrees	Fitness	↑18
52	Philips	Electronics	↓9
53	QQ	Social media	↓44
54	eLong	Travel/Booking	↑30
55	Taobao.com	Internet retail	↓54
56	Nike	Fitness	↑9
57	Netease	Media	↓2
58	Watsons	Retail/Health & beauty	↓2
59	Tudou	Social media	↓26
60	ASUS	Electronics	↓9
61	Walmart	Retail/General	↓30
62	Volkswagen	Automotive	↑35
63	Pizza Hut	Restaurants	↓48
64	HP	Electronics	↑6
65	Sony	Electronics	↑10
66	China Southern Airlines	Travel/Air	↑47

	BRAND	INDUSTRY	RANK CHG
67	Hunan TV	Media	↓5
68	Sohu	Media	↓29
69	LY.com	Travel/Booking	↓24
70	Samsung	Electronics	↓43
71	Sasa	Retail/Health & beauty	↑12
72	ANTA	Fitness	↓28
73	Gree	Appliances	↓33
74	Youku	Social media	↓53
75	TCL	Electronics	↓38
76	Haier	Appliances	↓8
77	Letv	Media	↓19
78	Lenovo	Electronics	↓12
79	Amazon	Internet retail	↓19
80	Suning	Retail/General	↓62
81	Li-Ning	Fitness	↓17
82	Gap	Retail/Fashion	↓4
83	H&M	Retail/Fashion	↓12
84	HTC	Electronics	↑17
85	Decathlon	Internet retail	↓37
86	Quanjude	Restaurants	↓48
87	Phoenix Television (PHTV)	Media	↓40
88	CAR Inc.	Travel/Car rental	↓3
89	Tuniu	Travel/Booking	↓1
90	Ctrip	Travel/Booking	↓49
91	Uber	Travel/Car rental	N/A
92	Apple	Electronics	↓16
93	iQIYI.com	Social media	↓43
94	China Eastern Airlines	Travel/Air	↑8
95	Air China	Travel/Air	↑21
96	Google	Internet search	↓61
97	AIA	General insurance	↑7
98	China Telecom	Telecom/Cell phone	↑10
99	China National Petroleum Corp	Utilities	↑16

	BRAND	INDUSTRY	RANK CHG
100	Weibo	Social media	↓72
101	China Mobile	Telecom/Cell phone	↓14
102	Bank of China	Banks/Retail	↑5
103	China Unicom	Telecom/Cell phone	↓23
104	YongChe.com	Travel/Car rental	N/A
105	China Gas	Utilities	↑9
106	LinkedIn	Social media	↓17
107	Changan	Automotive	↓17
108	China Merchants Bank	Banks/Retail	↓31
109	EMS	Shipping/Mail	↓11
110	ICBC	Banks/Retail	↓1
111	Bank of Communications	Banks/Retail	N/C
112	Agricultural Bank of China	Banks/Retail	N/C
113	China Construction Bank	Banks/Retail	↓8
114	ZTE	Electronics	↓41
115	Audi	Automotive	↓19
116	Anbang Insurance	General insurance	N/A
117	State Grid	Utilities	↓7
118	China Pacific Insurance	General insurance	↑5
119	People's Insurance Company of China	General insurance	↑5
120	Taikang Life	General insurance	N/C
121	China Life Insurance	General insurance	↑1
122	BYD	Automotive	↓50
123	Chery QQ	Automotive	↓20
124	Ping An Insurance	General insurance	↓3
125	New China Life	General insurance	↓6

China

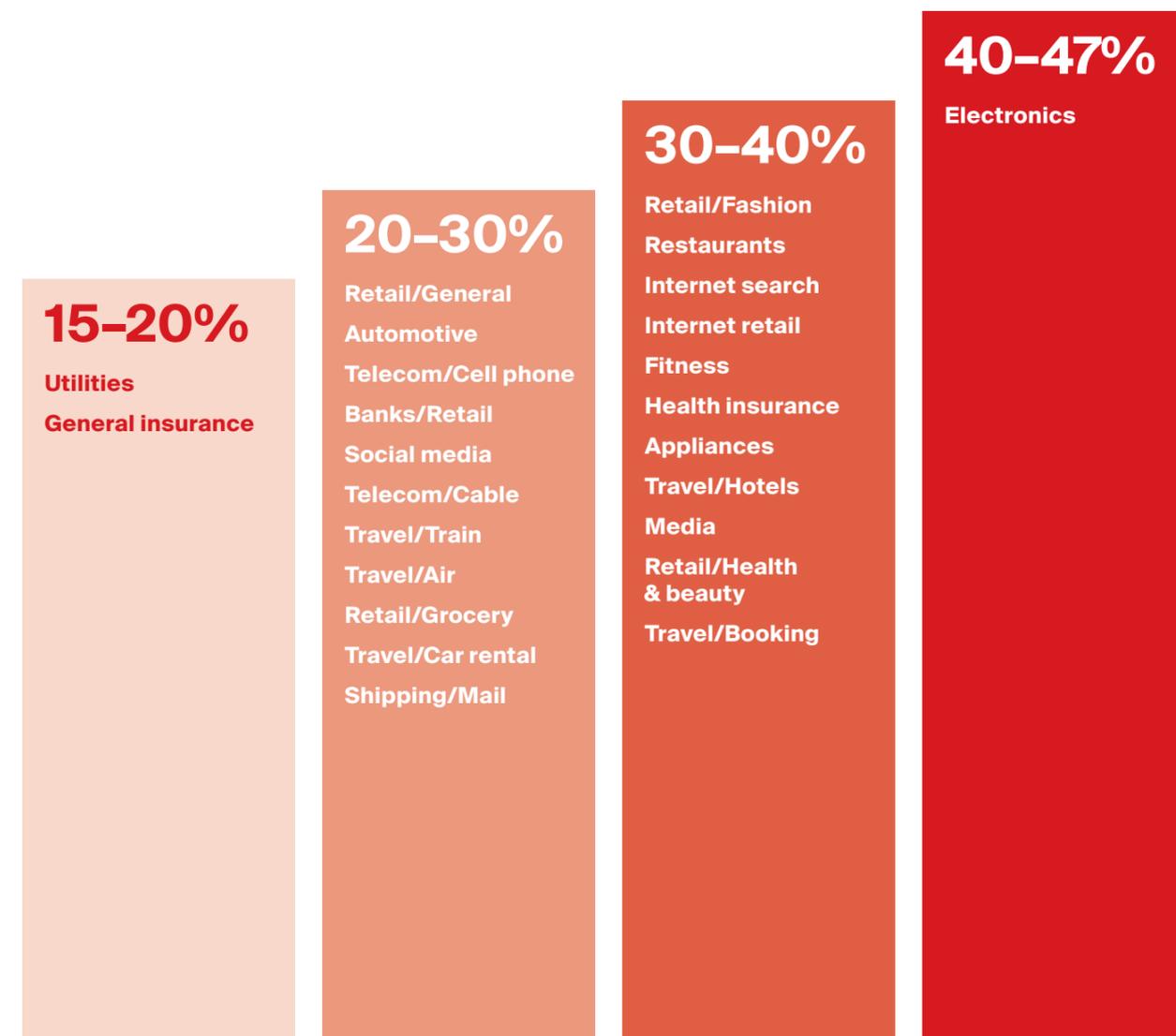
Simplicity premium

85%

**of consumers
are willing
to pay more
for simpler
experiences**

China

The percentage of consumers willing to pay more for simpler experiences varies by industry:



China



Middle East

Middle East

Industry Rankings

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

Brand Rankings

Middle East

BRAND	INDUSTRY	RANK CHG
1 WhatsApp	Social media	N/A
2 YouTube	Social media	N/C
3 Google	Internet search	↓2
4 Samsung	Electronics	N/C
5 Facebook	Social media	↑24
6 Dubai Metro	Travel/Train	↑26
7 Lenovo	Electronics	↑6
8 Microsoft	Electronics	↑11
9 Al Baik	Restaurants	↓6
10 Home Centre	Retail/General	↑53
11 Carrefour	Retail/Grocery	↓1
12 Emirates	Travel/Air	↑11
13 Dell	Electronics	↑13
14 Instagram	Social media	N/A
15 LG	Electronics	↓4
16 Saudia	Travel/Air	↑42
17 Sony	Electronics	↓10
18 McDonald's	Restaurants	↑3
19 Pizza Hut	Restaurants	↑1
20 HP	Electronics	↓3
21 KFC	Restaurants	↑21
22 Toyota	Automotive	↓14
23 Toshiba	Electronics	↓18
24 Apple	Electronics	↑4
25 IKEA	Retail/General	↓9
26 ADNOC	Utilities	↑36
27 Mobily	Telecom/Cell phone	↑32
28 Twitter	Social media	↓1
29 Sharaf DG	Retail/General	↑19
30 Skype	Telecom/Cell phone	↑15
31 HTC	Electronics	↓19
32 Souq.com	Internet retail	↑2
33 Gulf News	Media	↑28

BRAND	INDUSTRY	RANK CHG
34 Dubai TV	Media	↑22
35 Zain	Telecom/Cell phone	↓10
36 FlyDubai	Travel/Air	↓22
37 Asharq Al-Awsat	Media	↑1
38 Etihad Airways	Travel/Air	↑49
39 Philips	Electronics	↓17
40 Splash	Retail/Fashion	N/A
41 Nike	Fitness	↑8
42 Nissan	Automotive	↓6
43 Adidas	Fitness	↓3
44 Yahoo!	Internet search	↓35
45 Alriyadh	Media	↓12
46 Sheraton	Travel/Hotels	↑31
47 H&M	Retail/Fashion	↑20
48 Cheesecake Factory	Restaurants	N/A
49 Al Arabiya	Media	↑26
50 eXtra	Retail/General	↓15
51 Saudi Railways	Travel/Train	↑15
52 Panda	Retail/Grocery	↓46
53 Alinma Bank	Banks/Retail	↓38
54 Spinneys	Retail/Grocery	↑34
55 Chili's	Restaurants	↑41
56 Aramex	Shipping/Mail	↑16
57 Starbucks	Restaurants	↓7
58 Abu Dhabi National Insurance Company (ADNIC)	General insurance	↑67
59 Boots	Retail/Health & beauty	↑57
60 The Body Shop	Retail/Health & beauty	↓6
61 Al Jazeera	Media	↓43
62 Rotana	Travel/Hotels	↑8
63 Abu Dhabi Islamic Bank	Banks/Retail	↑50
64 NCB	Banks/Retail	↓9
65 Amazon	Internet retail	↑52
66 SACO	Retail/General	↓42

BRAND	INDUSTRY	RANK CHG
67 Arab News	Media	↓30
68 Namshi.com	Internet retail	↓22
69 Debenhams	Retail/General	↑14
70 Fedex	Shipping/Mail	↓10
71 du	Telecom/Cell phone	N/C
72 DHL	Shipping/Mail	↓20
73 Faces	Retail/Health & beauty	↑6
74 Topshop	Retail/Fashion	↑49
75 dr. CAFÉ	Restaurants	↓44
76 ENOC	Utilities	↓33
77 Sephora	Retail/Health & beauty	↓1
78 Gulf Air	Travel/Air	↑15
79 Emirates NBD	Banks/Retail	↓10
80 Qatar Airways	Travel/Air	↓16
81 Audi	Automotive	↑5
82 Marriott	Travel/Hotels	↑16
83 ZARA	Retail/Fashion	↓18
84 SABB	Banks/Retail	↓40
85 Uber	Travel/Car rental	N/A
86 Abu Dhabi Commercial Bank	Banks/Retail	↓29
87 dnata	Travel/Booking	↑7
88 Choitrams	Retail/Grocery	↓7
89 National Bank of Abu Dhabi	Banks/Retail	↑33
90 MANGO	Retail/Fashion	↑7
91 Careem	Travel/Car rental	N/A
92 Al Tayyar	Travel/Booking	↓12
93 Daman	Health insurance	↑15
94 Holiday Inn	Travel/Hotels	↓10
95 iTunes	Internet retail	↓6
96 Reebok	Fitness	↓6
97 BMW	Automotive	↑13
98 Shake Shack	Restaurants	N/A
99 Siemens	Electronics	↑12

BRAND	INDUSTRY	RANK CHG
100 Puma	Fitness	↓18
101 Citibank	Banks/Retail	↑23
102 Jumeirah	Travel/Hotels	↑3
103 Virgin Stores	Retail/General	N/A
104 UPS	Shipping/Mail	↓30
105 The Saudi Investment Bank	Banks/Retail	↓75
106 Al Rajhi Bank	Banks/Retail	↑3
107 Marks & Spencer	Retail/General	↓29
108 STC	Telecom/Cell phone	↓4
109 The National	Media	↓62
110 LinkedIn	Social media	↓7
111 Orbit Showtime Network	Telecom/Cable	↓20
112 Mercedes-Benz	Automotive	↓27
113 Paris Gallery	Retail/Health & beauty	↓40
114 Emirates Islamic Bank	Banks/Retail	↑1
115 Bupa	Health insurance	↑6
116 Under Armour	Fitness	N/A
117 Oman Insurance Company	General insurance	↑2
118 GMC	Automotive	↓50
119 Etisalat	Telecom/Cell phone	↓66
120 Saudi TV	Media	↓28
121 Bank Albilad	Banks/Retail	↓14
122 Commercial Bank of Dubai	Banks/Retail	N/A
123 Mashreq Bank	Banks/Retail	↓22
124 New Balance	Fitness	N/A
125 HSBC	Banks/Retail	↓30
126 Saudi Post	Shipping/Mail	↓12
127 Medgulf	General insurance	↓21
128 Tawuniya	General insurance	↓10
129 AXA	General insurance	↓17
130 Hertz	Travel/Car rental	↓28
131 Budget	Travel/Car rental	↓32
132 Avis	Travel/Car rental	↓12

Middle East

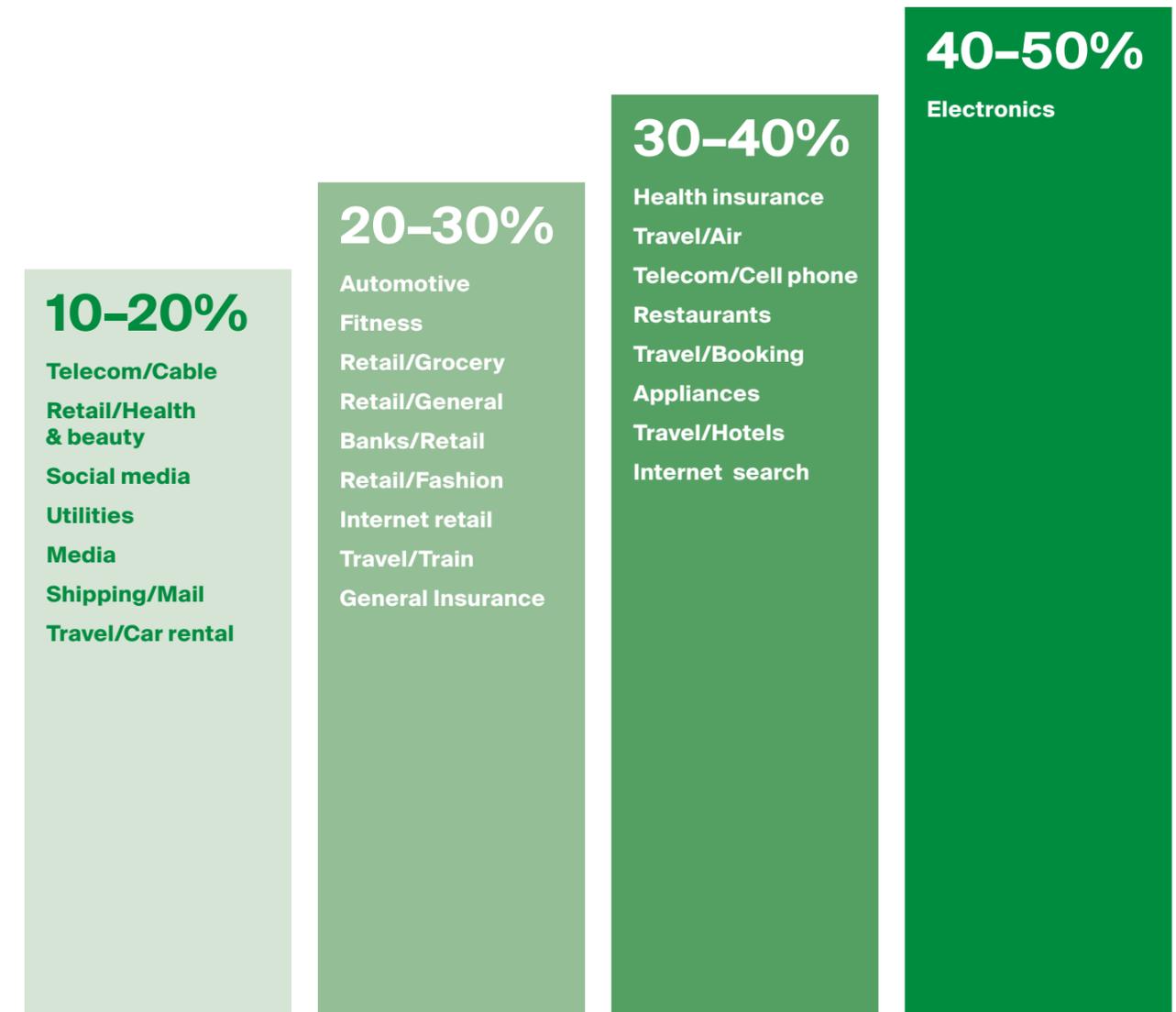
Simplicity premium

84%

of consumers are willing to pay more for simpler experiences

Middle East

The percentage of consumers willing to pay more for simpler experiences varies by industry:



Middle East



India

Industry Rankings

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

Brand Rankings

BRAND	INDUSTRY	RANK CHG
1 Google	Internet search	N/C
2 LG	Electronics	↑9
3 Dell	Electronics	N/C
4 YouTube	Social media	↑6
5 Sony	Electronics	↑4
6 Facebook	Social media	↓4
7 HP	Electronics	↑5
8 Philips	Electronics	↓1
9 Maruti Suzuki	Automotive	↑10
10 Tata Sky	Telecom/Cable	↑24
11 Nokia	Electronics	↓3
12 Levi's	Retail/Fashion	↑29
13 McDonald's	Restaurants	↑14
14 Samsung	Electronics	↑14
15 Vodafone	Telecom/Cell phone	↑28
16 Pizza Hut	Restaurants	↑26
17 Nike	Fitness	↑9
18 The Times of India	Media	↓13
19 Snapdeal.com	Internet retail	↓1
20 Hero MotoCorp	Automotive	↑20
21 MakeMyTrip	Travel/Booking	↑10
22 Tata Indicom	Telecom/Cell phone	↑55
23 Cleartrip	Travel/Booking	↑42
24 Bata	Internet retail	↓11
25 Domino's	Restaurants	↓1
26 Big Bazaar	Retail/General	↓4
27 Haldiram	Restaurants	↑45
28 airtel	Telecom/Cell phone	↓13
29 Reliance Fresh	Retail/Grocery	↑6
30 Café Coffee Day	Restaurants	↑18
31 Pantaloons	Retail/General	↑25
32 Microsoft	Electronics	↓26
33 Reebok	Fitness	↓1

BRAND	INDUSTRY	RANK CHG
34 Lee	Retail/Fashion	↓11
35 Apple	Electronics	↓10
36 Punjab National Bank	Banks/Retail	N/A
37 Lifestyle	Retail/General	↑2
38 ICICI Bank	Banks/Retail	↑25
39 Skype	Telecom/Cell phone	↓9
40 Lakmé	Retail/Health & beauty	↑22
41 Videocon	Electronics	↑33
42 Himalaya Healthcare	Retail/Health & beauty	↑2
43 Adidas	Fitness	↓26
44 Peter England	Retail/Fashion	↑26
45 Instagram	Social media	N/A
46 Croma	Retail/General	↑42
47 State Bank of India	Banks/Retail	↓33
48 Yatra	Travel/Booking	↓15
49 Ford	Automotive	↑31
50 Groupon	Internet retail	↓4
51 Godrej	Appliances	↓30
52 Jet Airways	Travel/Air	↑23
53 Spencer's	Retail/General	↑7
54 Idea Cellular	Telecom/Cell phone	N/A
55 Tata Motors	Automotive	↑23
56 Shoppers Stop	Internet retail	↓20
57 The Hindu	Media	↓8
58 Barista	Restaurants	↑15
59 Panasonic	Electronics	↓9
60 HDFC Bank	Banks/Retail	↓7
61 Travelguru	Travel/Booking	↓6
62 Toyota	Automotive	↑14
63 eBay	Internet retail	↓47
64 TVS Motor	Automotive	↓26
65 Godrej Nature's Basket	Retail/Grocery	↑2
66 BSNL	Telecom/Cell phone	↑13

BRAND	INDUSTRY	RANK CHG
67 IndiGo	Travel/Air	N/A
68 Onida	Electronics	↓14
69 Bajaj Auto	Automotive	↑2
70 Volkswagen	Automotive	↓25
71 Mercedes-Benz	Automotive	N/A
72 Bank of India	Banks/Retail	↓35
73 Taj	Travel/Hotels	↓22
74 The Leela	Travel/Hotels	↑19
75 ITC	Travel/Hotels	↓14
76 Canon	Electronics	↓56
77 Megamart	Retail/General	↓20
78 Virgin Mobile	Telecom/Cell phone	↓49
79 FedEx	Shipping/Mail	↑6
80 Viveks	Retail/General	↑17
81 GoAir	Travel/Air	N/A
82 BMW	Automotive	N/A
83 Holiday Inn	Travel/Hotels	↓17
84 Standard Chartered	Banks/Retail	↓16
85 Union Bank of India	Banks/Retail	N/A
86 MINT	Media	↑3
87 TravelChaCha	Travel/Booking	↑18
88 Reliance Mobile	Telecom/Cell phone	↓19
89 Hyatt	Travel/Hotels	↑2
90 Oberoi	Travel/Hotels	↓6
91 Tata DoCoMo	Telecom/Cell phone	↓27
92 Haier	Appliances	↓11
93 Westside	Retail/General	↓46
94 Canara Bank	Banks/Retail	N/A
95 Air India	Travel/Air	↓12
96 LIC	General insurance	↓38
97 Provogue	Retail/General	N/A
98 SpiceJet	Travel/Air	N/A
99 HSBC	Banks/Retail	↑2

BRAND	INDUSTRY	RANK CHG
100 Audi	Automotive	N/A
101 UPS	Shipping/Mail	↓6
102 LinkedIn	Social media	↓43
103 DHL	Shipping/Mail	↓16
104 DNA	Media	↓22
105 IFFCO Tokio	General insurance	↑1
106 Aviva	General insurance	N/A
107 Avis	Travel/Car rental	↓15
108 Travelocity	Travel/Booking	↓14
109 Marriott	Travel/Hotels	↓57
110 Hertz	Travel/Car rental	↓11
111 BlackBerry	Electronics	↓25
112 Bajaj Allianz	General insurance	↓10
113 Oriental Insurance	General insurance	↓10
114 Peugeot	Automotive	↓7
115 Ixigo	Travel/Booking	↓25
116 Tata AIG	General insurance	↓8
117 ICICI Prudential	General insurance	↓21
118 T24 Mobile	Telecom/Cell phone	↓18
119 Max Bupa	Health insurance	↓15
120 Birla Sun Life	General insurance	↓22

India

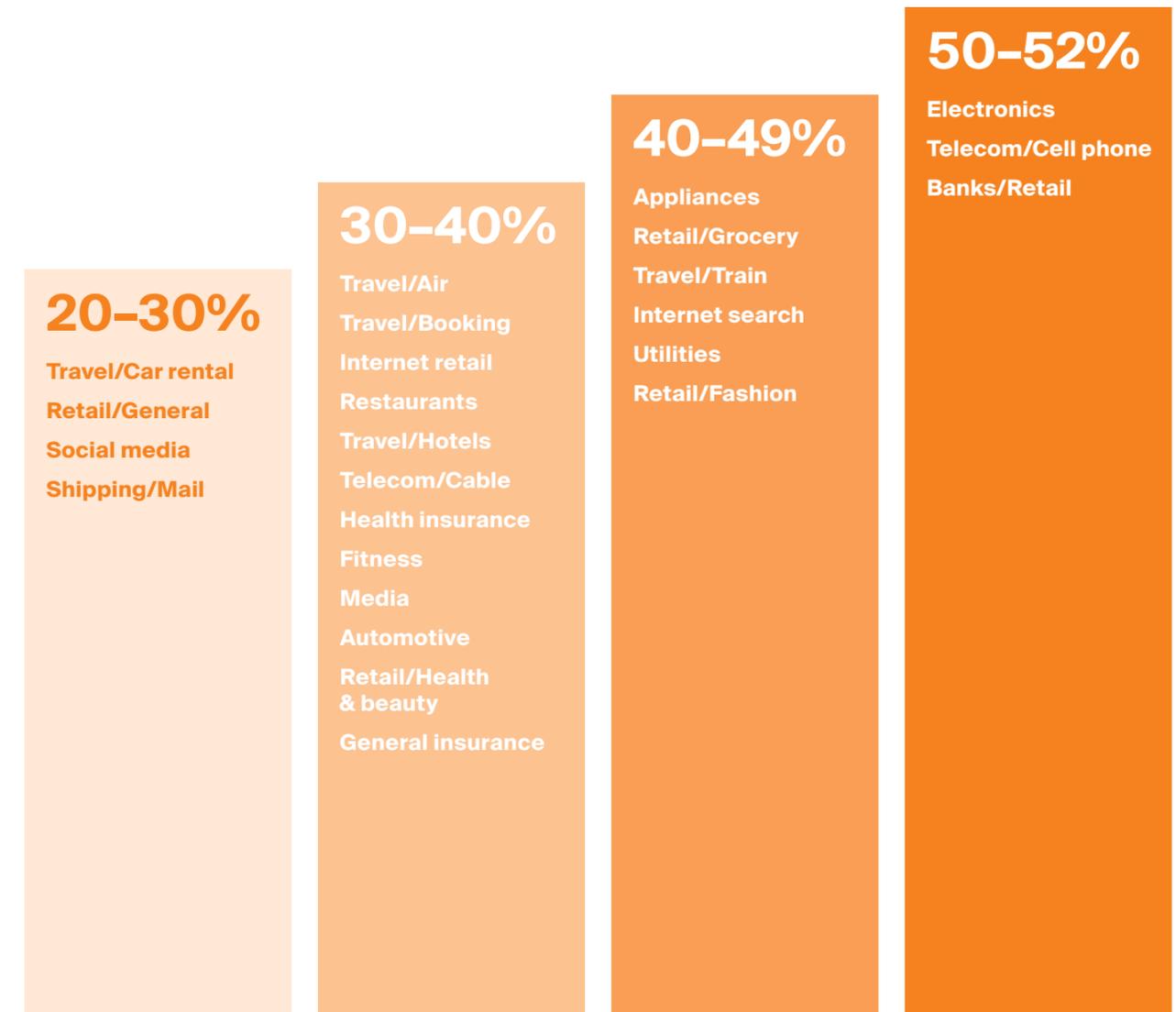
India

Simplicity premium

92%

of consumers are willing to pay more for simpler experiences

The percentage of consumers willing to pay more for simpler experiences varies by industry:



India

India



Japan

Japan

Industry Rankings

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

Brand Rankings

Japan

	BRAND	INDUSTRY
1	Yoshinoya	Restaurants
2	Saizeriya	Restaurants
3	Shimamura	Retail/Fashion
4	Sukiya	Restaurants
5	Sushiro	Restaurants
6	Yamato Transport	Shipping/Mail
7	Mos Burger	Restaurants
8	Uniqlo	Retail/Fashion
9	KFC	Restaurants
10	Peach	Travel/Air
11	FamilyMart	Retail/Grocery
12	Ministop	Retail/Grocery
13	Amazon	Internet retail
14	Starflyer	Travel/Air
15	Sundrug	Retail/Health & beauty
16	Sugi Pharmacy	Retail/Health & beauty
17	Bing	Internet search
18	Tsuruha	Retail/Health & beauty
19	Circle K Sunkus	Retail/Grocery
20	Jetstar	Travel/Air
21	Lawson	Retail/Grocery
22	Zozotown	Internet retail
23	Skylark	Restaurants
24	Tobu	Travel/Train
25	Sagawa Express	Shipping/Mail
26	Tokyu	Travel/Train
27	Shirokiya	Restaurants
28	Suzuki	Automotive
29	Matsumoto Kiyoshi	Retail/Health & beauty
30	Subaru	Automotive
31	Skymark	Travel/Air
32	Cosmos Pharmaceutical	Retail/Health & beauty
33	Google	Internet search

Japan

	BRAND	INDUSTRY
34	Kintetsu	Travel/Train
35	Fujita Kanko	Travel/Hotels
36	Yahoo!	Internet search
37	AEON	Retail/Grocery
38	Nippon Rent-A-Car	Travel/Car rental
39	Seino Transportation	Shipping/Mail
40	Mainichi Shimbun	Media
41	Mercari	Internet retail
42	Tokyo Metro	Travel/Train
43	Nippon Express	Shipping/Mail
44	Aoyama Tailor	Retail/Fashion
45	Honda	Automotive
46	Air Do	Travel/Air
47	H.I.S.	Travel/Booking
48	McDonald's	Restaurants
49	Odakyu	Travel/Train
50	JR Tokai	Travel/Train
51	World	Retail/Fashion
52	Hankyu Hanshin (Railway)	Travel/Train
53	Hotel Okura	Travel/Hotels
54	Imperial Hotel	Travel/Hotels
55	Toyota	Automotive
56	Mazda	Automotive
57	ANA	Travel/Air
58	Daihatsu	Automotive
59	Instagram	Social media
60	Isetan Mitsukoshi	Retail/General
61	Hitachi	Electronics
62	JR East Japan	Travel/Train
63	Mitsubishi Electric	Electronics
64	Panasonic	Electronics
65	Nikkei	Media
66	Twitter	Social media

Japan

	BRAND	INDUSTRY
67	Seibu	Travel/Train
68	Onward	Retail/Fashion
69	Yomiuri Shimbun	Media
70	Takashimaya	Retail/General
71	Hankyu Hanshin (Department store)	Retail/General
72	Keio Plaza Hotel	Travel/Hotels
73	RIHGA Royal Hotel	Travel/Hotels
74	TV Asahi	Media
75	Sony	Electronics
76	JTB	Travel/Booking
77	SKY PerfecTV!	Media
78	Sharp	Electronics
79	Kampo (Life Insurance)	Health insurance
80	Daimaru Matsuzakaya	Retail/General
81	Nissan	Automotive
82	Prince Hotel	Travel/Hotels
83	Nippon Television	Media
84	Meitetsu	Travel/Train
85	The New Otani	Travel/Hotels
86	Toshiba	Electronics
87	Seven Eleven	Retail/General
88	Risona	Banks/Retail
89	LINE	Social media
90	Asahi Shimbun	Media
91	Osaka Gas	Utilities
92	Nippon Travel Agency	Travel/Booking
93	Tokyo Gas	Utilities
94	Japan Airlines	Travel/Air
95	Aflac	Health insurance
96	Tokyo Broadcasting System (TBS)	Media
97	Prudential Life Insurance	Health insurance
98	Rakuten	Internet retail
99	Fuji Television	Media

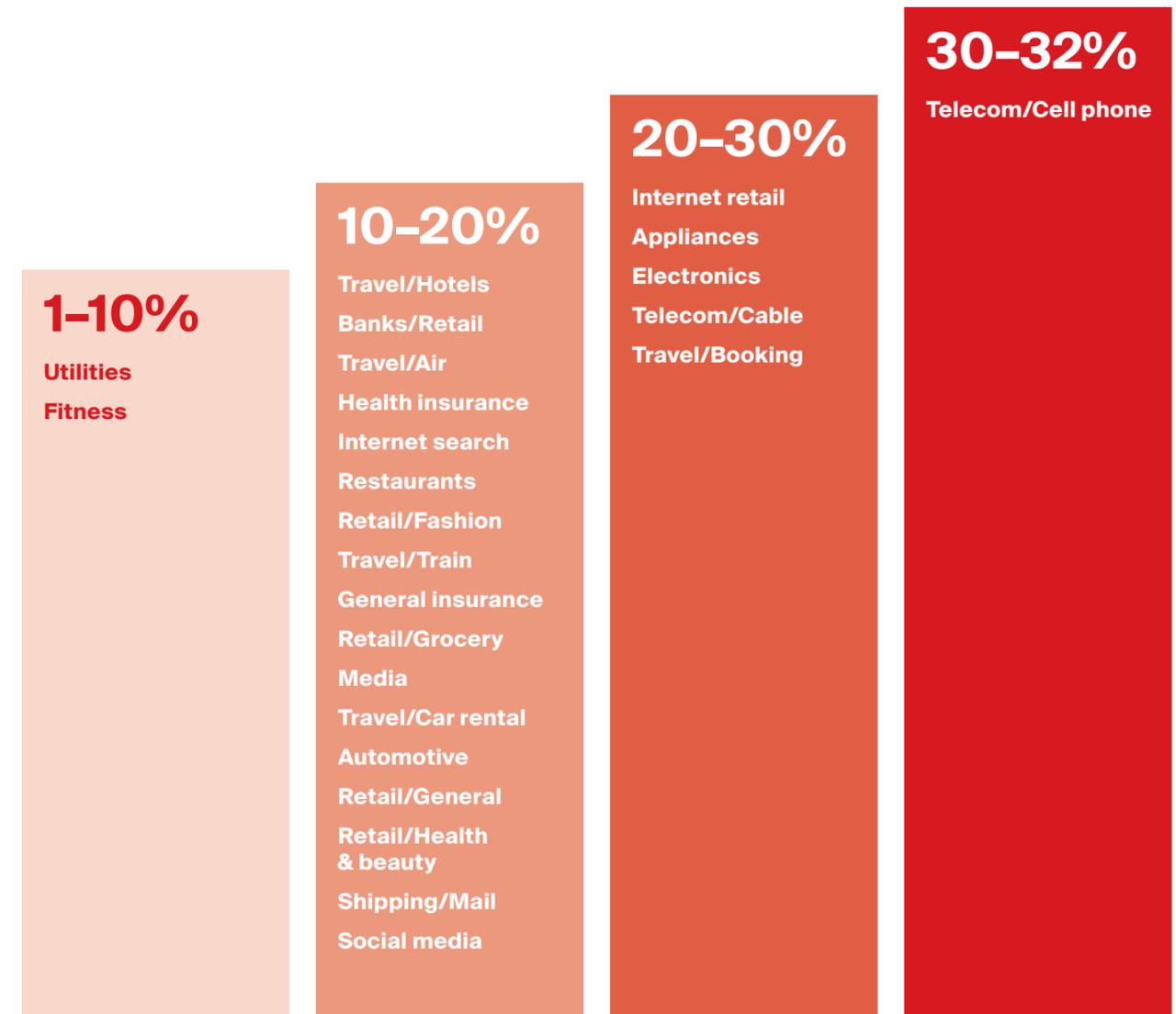
Note: Ranking changes are not shown due to Japan's introduction to the index.

Simplicity premium

67%

of consumers are willing to pay more for simpler experiences

The percentage of consumers willing to pay more for simpler experiences varies by industry:



What does it take to deliver truly simple experiences? For the past two years, we've surveyed emerging brands that are changing the stakes for what it takes to deliver simple, meaningful customer experiences.

Global disrupters

These disrupters:

1 Empower people
Sidestep traditional industry protocols and shift power to consumers.

2 Reimagine experiences
Turn underwhelming experiences into moments of delight.

3 Remove friction
Identify pain points in everyday processes, and remove them.

4 Save time
Value people's time by providing service where and when they need it most.

5 Provide utility
They demonstrate usefulness beyond their core offerings or services.

A disrupter's deliberate focus on simplifying customers' lives is paying off. This year, two brands ranked in the top five of our US disrupters index were purchased by established industry brands for billions of dollars. Just another example of how simplicity pays.

No. 1

In July 2016, Unilever acquired our number one ranked US disrupter, Dollar Shave Club, for a value of \$1 billion in an effort to improve technology and expertise around their direct-to-consumer offering.



No. 5

At number five in our US disrupters index, the web-retailer, Jet.com was purchased for \$3.3 billion by Walmart to jump-start e-commerce operations for the retail giant.



We asked people in the US and UK to evaluate emerging brands based on the simplicity of their products, services, interactions and communications. Here's how they ranked.*

US

BRAND	RANK
Dollar Shave Club	1
GrubHub	2
Square	3
Spotify	4
Jet	5
Airbnb	6
Uber	7
Ally	8
The Honest Company	9
Venmo	10
WhatsApp	11
Google Wallet	12
GoPro	13
FitBit	14
Etsy	15
Hulu	16
Lyft	17
Buzzfeed	18
My Fitness Pal	19
VRBO	20
HBO Now/HBO Go	21
RunKeeper	22
BleacherReport	23
Snapchat	24
Gilt	25

UK

BRAND	RANK
OVO Energy	1
City Mapper	2
Shazam	3
GoPro	4
My Fitness Pal	5
Netflix	6
Grazebox	7
Deliveroo	8
Eventbrite	9
Uber	10
Paypal	11
WhatsApp	12
Airbnb	13
Tinder	14
NOW TV	15
Spotify	16
Nest	17
Snapchat	18
BT Sport	19
Dropbox	20
Etsy	21

*For information on our ranking methodology, go to page 93.

Research methodology

To determine the global state of simplicity, **Siegel+Gale** fielded an online survey with more than 14,000 respondents in 9 countries to gather perspectives on simplicity and how industries and brands make people's lives simpler or more complex. During the study, respondents rated a total of 857 brands. The brands were selected as a representative set that respondents would be most likely to know and/or use in each country.

Sample set

Between July 5 & July 29, 2016, Siegel+Gale used an online survey to poll 14,044 consumers in 9 countries:

United States: 1,755
 United Kingdom: 1,764
 Germany: 1,750
 Sweden: 1,751
 Mainland China: 1,751
 India: 1,759
 UAE and Saudi Arabia: 1,752
 Japan: 1,762

Survey topics

This year's respondents answered questions about brand touchpoints within specific industries and brands as well as their perceptions on their employee experience, including:

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

Brand Simplicity Score

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

The Brand 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 difference between user and non-user ratings)
- The Simplicity Score for the brand's industry or category(ies)

Industry Simplicity Score

Each country rated the following industries:

Appliances, Automotive, Banks/Retail, Electronics, Fitness, General insurance, Health insurance, Internet search, Internet retail, Media, Restaurants, Retail/Fashion, Retail/General, Retail/Grocery, Retail Health & beauty, Shipping/Mail, Social media, Telecom/Cable, Telecom/Cell phone, Travel/Air, Travel/Booking, Travel/Car rental, Travel/Hotels, Travel/Train, and Utilities.

The Industry score was calculated with the following inputs:

- The industry's contribution to making life simpler or more complex
- The pain of typical interactions with companies/organizations within the industry
- How the industry's typical communications rank in terms of:
 - Ease of understanding
 - Transparency/honesty
 - Communicating that customer needs are being cared for/making the customer feel valued and appreciated
 - Innovation/freshness
 - Usefulness

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

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

**Siegel+Gale
is the simplicity
company.**

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Simple is smart.