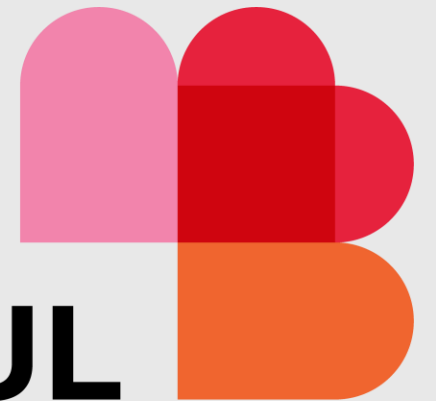
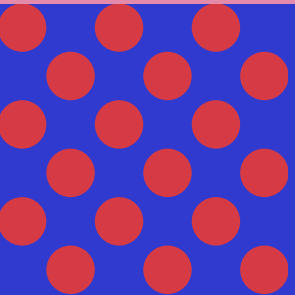




HAVAS
GROUP

MEANINGFUL BRANDS 2021





MEANINGFUL BRANDS

Twelve Year study exploring how brands tangibly improve peoples' lives functionally, enhance their personal well-being, and contribute to wider society.

The Meaningful Brands Study is unique within the industry

1

Dating from 2009, was the **FIRST GLOBAL FRAMEWORK** to connect brands with human well-being

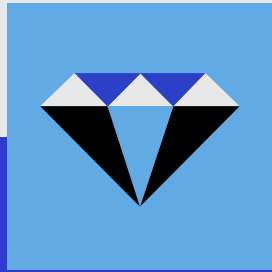
2

Explores **PROPRIETARY METRIC** of brand strength for business and marketing planning

3

Helps us identify how and where to **MEANINGFULLY ENGAGE** with people through customer, brand and media experiences

Why the Study Matters Now More than Ever



In current landscape, consumers and society expect more **long-term value** from businesses and brands



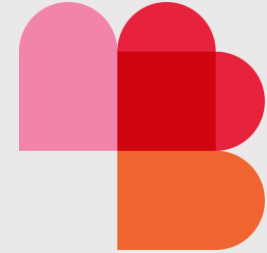
After almost 50 years, Davos Manifesto was updated, emphasizing the responsibility for businesses to be **stewards of the planet and all people**



The idea of **stakeholder capitalism** is growing in momentum

A Tangible Definition of 'Meaningful'

Understanding what matters across 3 pillars and 14 dimensions

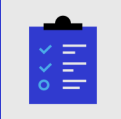


PERSONAL BENEFITS

Messaging and behavior that connects on an individual basis and serves a specific personal need or want



PHYSICAL



ORGANISATIONAL



FINANCIAL



INTELLECTUAL



SOCIAL



EMOTIONAL



NATURAL

COLLECTIVE BENEFITS

Company initiatives, behaviors, and actions that respond to and connect at the social and cultural level



ECONOMY



EMPLOYER



ETHICS



GOOD LIVING



ENVIRONMENT



SOCIAL JUSTICE

FUNCTIONAL BENEFITS

Rational benefits focused on product functionality, customer service, interactivity, and technology



FUNCTIONAL

Brands are measured against specific attributes – *pertinent to their category* – within each pillar



FUNCTIONAL

How the product or service delivers

- Banking app
- Best Camera
- Clear Info
- Comfortable clothes
- Compatibility
- Data privacy
- Delivers
- Designs
- Digital experience
- Easy journey
- Easy returns
- Easy Switch
- Exclusive exp.
- Fair Prices
- Fix cuts
- Handling
- Handset Change
- Helpful Staff
- In charge
- In store experience
- Inclusive Collection
- Innovative
- Interactions
- Leader
- Multisensory
- Price's consistency
- Proactive
- Quality brands
- Quality Prods
- Range
- Respect
- Safe & Responsible
- Safety features
- Scents
- Tariffs Range
- Technology-driven
- Tools & services
- Unique
- Upright



PERSONAL

How brands improve peoples' lives

- PHYSICAL**
 - Healthy
 - Attractive
- ORGANISATIONAL**
 - Life Easier
 - Better Habits
 - Save Time
- FINANCIAL**
 - Best interests
 - Savings
 - Wealth
- INTELLECTUAL**
 - Trendy
 - Skills
 - New Ideas
- SOCIAL**
 - Belonging
 - Sharing
 - Connecting
 - Closer
- EMOTIONAL**
 - Me Happy
 - Makes me content
 - Self-Esteem
 - Peace of Mind
 - Show-off/Pride
 - Self expression
 - Privileged
 - Relaxed
- NATURAL**
 - Env. Enabler
 - Sense of Purpose



COLLECTIVE

A brands role in society

- ECONOMY**
 - Local Suppliers
 - Development
 - Benefits the Economy
- ETHICS**
 - Transparent
 - Causes
 - Data protection
 - Ethical
- ENVIRONMENT**
 - Respects Animals
 - Sust. consumption
 - Climate change
 - Respects Nature
 - Sust. Energy
 - Sust. Innovations
 - Clean supply chain
 - Food waste
 - Sust. Brands
- SOCIAL JUSTICE**
 - Migrants
 - LGBT+ rights
 - Women's rights
 - Anti-racism
 - Social Leader
 - Improve access
 - Diversity
- GOOD LIVING**
 - Healthy lives
 - Education
 - Culture access
 - Food security
 - Poverty
- EMPLOYER**
 - Good employer
 - Jobs
 - Invests

In orange: Attributes specific to a category

The Study is Valuable in Multiple Ways

Understanding the specific **FUNCTIONAL, PERSONAL AND COLLECTIVE** benefits that people are seeking from a brand in a given category

Recognizing the **DEFICIT** and capitalizing on this for competitive advantage

IDENTIFYING THE BEST KIND OF CONTENT

For a brand to deliver within the customer's journey

Unlocking the **AUTHENTIC** role for a brand to play in a landscape that requires new kinds of **SOCIETAL COMMITMENTS**



**For the 12th year,
there is a decline
in the value most
consumers see
from brands**

People would
not care if
75%
of brands
disappeared

**Worse still – Uncertainty Spills over.
Political and social unrest,
disinformation and distrust have
begun to impact our relationship
with brands.**

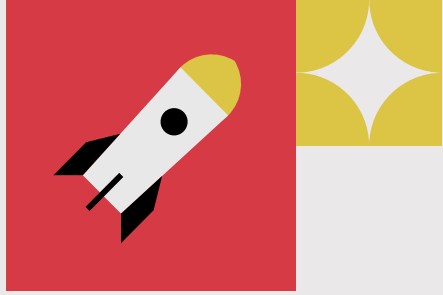
71%

**Of Consumers are Tired of
Brands' Empty Promises**



The Age of Cynicism

Cynicism
Cynicism
Cynicism
Cynicism
Cynicism
Cynicism
Cynicism



Meaningful Brands 2021 in numbers

2021 Study

(Conducted Q3 2020)

+395,000

citizens

+2,000

brands

30

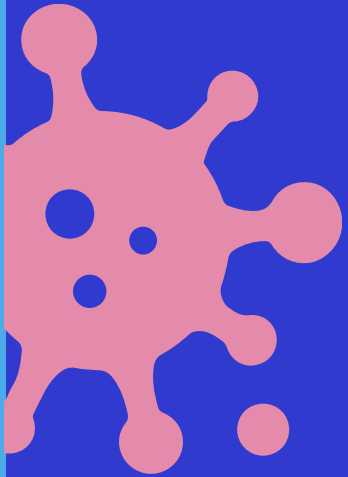
markets

21

industries

The chaotic cultural landscape exacerbated in 2020 has significantly impacted consumer priorities and behavior

Global
Pandemic



Political
Friction



Societal
Demands



Misinformation/
Disinformation



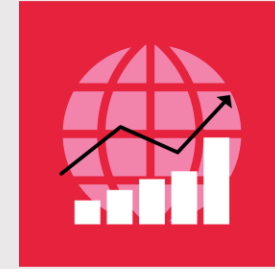
A state of crisis has shifted our priorities

Three quarters of Global Citizens
feel we are living in a global crisis
across four key areas



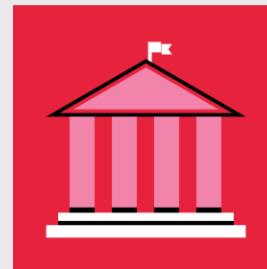
Public Health

78%



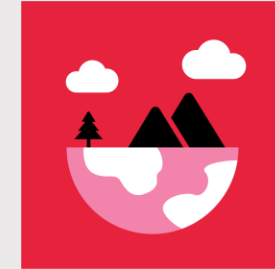
Economy

77%



Politics

72%



Environment

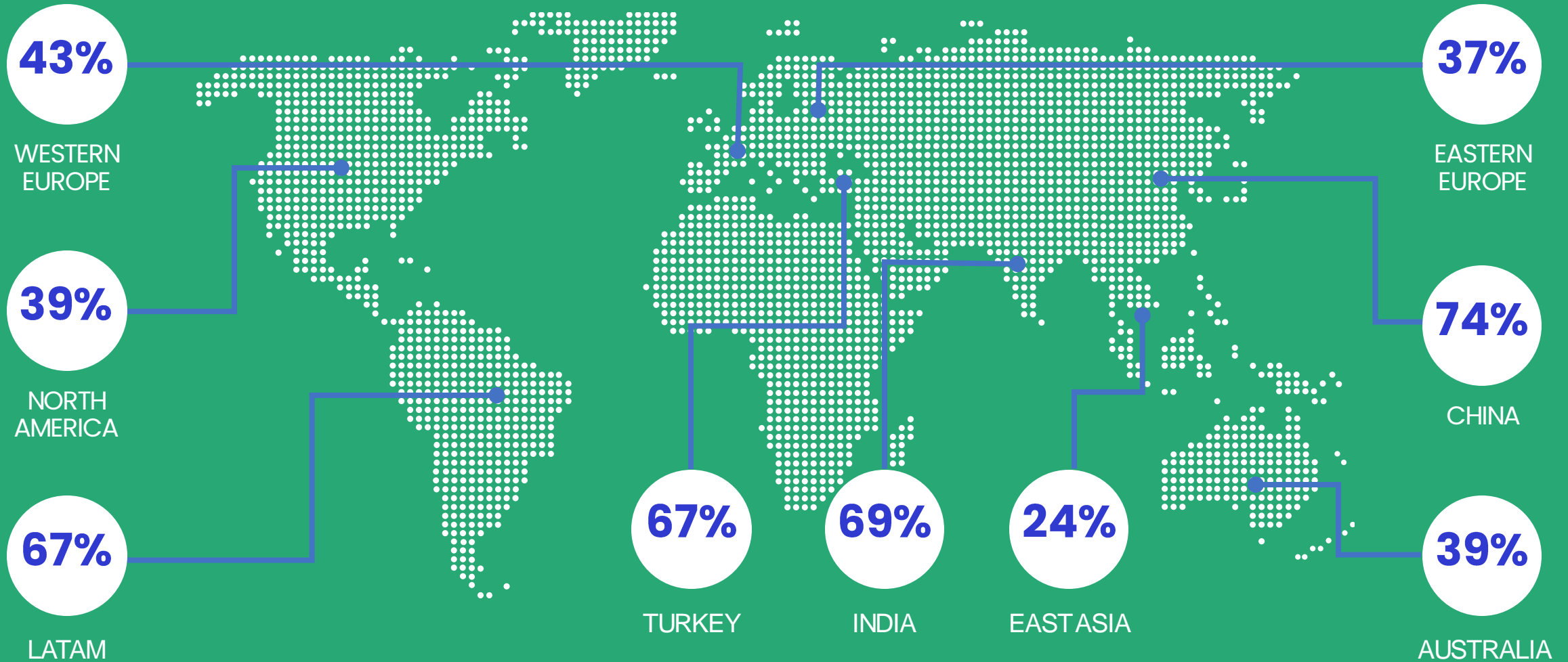
72%



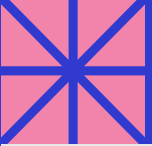
**Amidst this culture of
chaos and uncertainty, we
are sadly, globally aligned**

47%

**Less than
half of
brands are
actually
seen as
trustworthy**



Brand Trust is At an All Time Low In Many Parts of the World



Yet
expectation
is at an All
Time High

73%

think brands
must act **NOW**
for the good of
society & planet



MEANINGFUL
BRANDS

SOURCE: MEANINGFUL BRANDS™ 2021

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GROUP

People not only expect better behavior – they are **willing to pay more!**

+10 pts. vs. 2019

53%

are ready to pay more for a brand that takes a stand on environmental and social issues

64%

of citizens prefer to buy from companies with a reputation for having a purpose other than just profits

You can't con your consumer They are aware of your actions

Only **36%**

feel satisfied with companies' or brands' concrete actions to make the world a better place

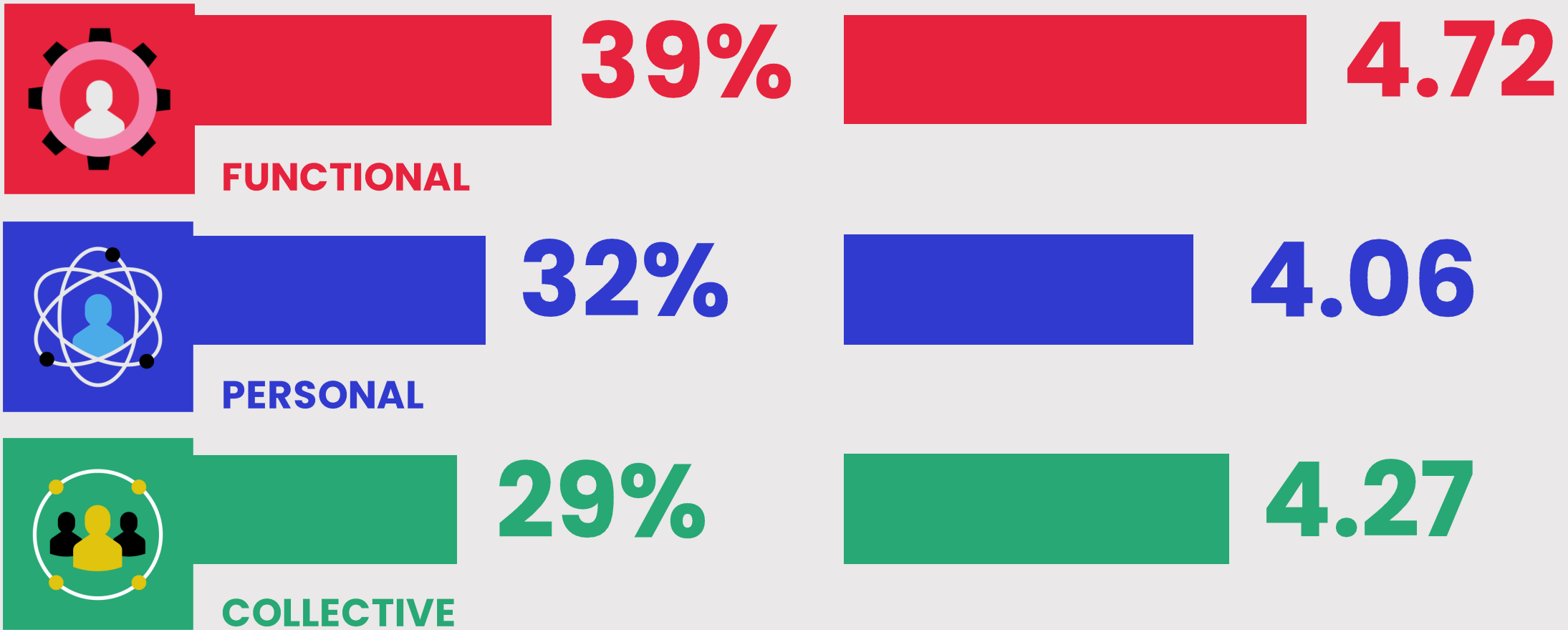
Only **34%**

of consumers think companies and brands are transparent about their commitments and promises

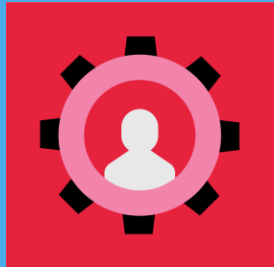
Brands continue to focus on functional delivery – it's important but not the whole picture

DRIVERS' IMPORTANCE

BRANDS' PERFORMANCE



Consumers are seeking more Personal and Collective Benefits to enhance their well-being



FUNCTIONAL

Deliver a good product / service

39% ▼ -2pts

- 108 → Quality Prods ▼
- 106 → Delivers ▼
- 105 → Safe & Responsible ▼
- 104 → Fair Prices
- 103 → Leader ▼



PERSONAL

Improve peoples' lives

32% ▲ +2pts

- 112 → Life Easier ▲
- 108 → Peace of Mind ▲
- 108 → Life Satisfaction
- 107 → Show-off / Pride ▲
- 106 → Me Happier



COLLECTIVE

Play a role in society & environment

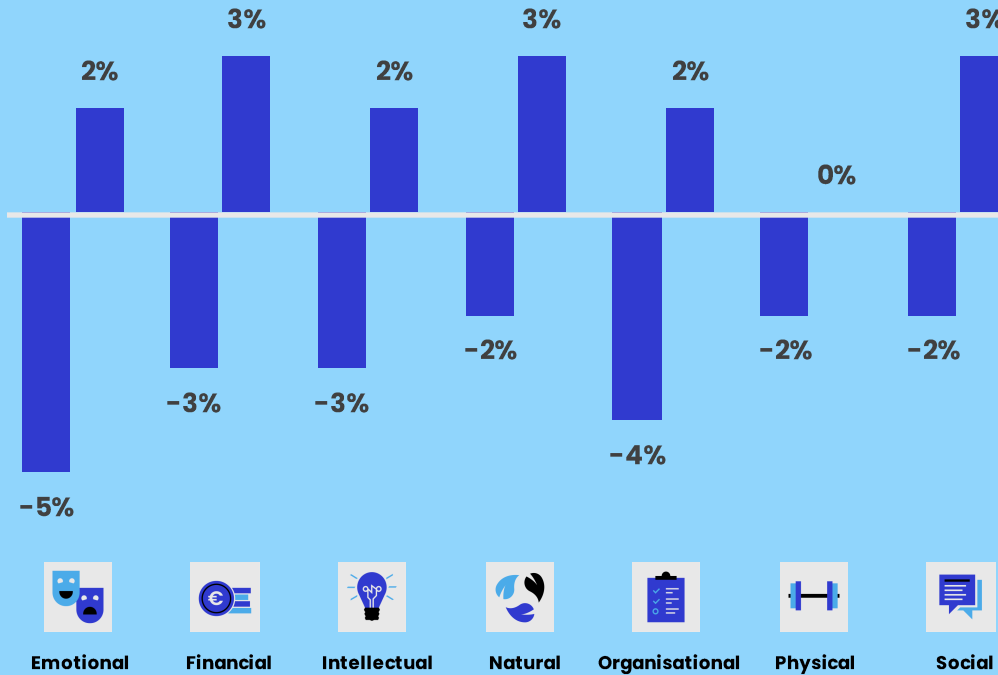
29% =

- 113 → Transparent
- 110 → Ethical
- 109 → Benefits the Economy ▲
- 107 → Good employer ▲
- 107 → Jobs

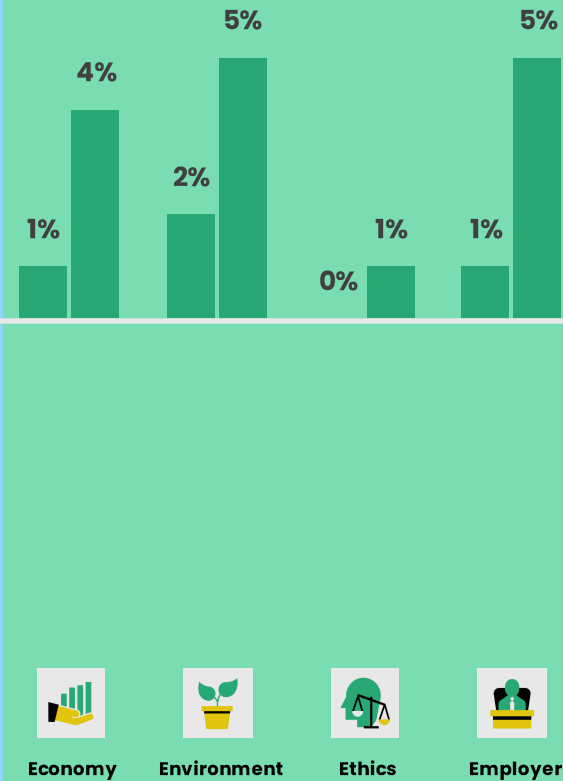
While the spike in Personal Benefits has been influenced by the crisis Collective Benefits have been trending long term

Evolution 2017-2019 & 2019-2021

Near term opportunities across **Personal benefits**



Long term opportunities across **Collective benefits**



**This year, we looked
more widely at how
brands aim to deliver
against 'collective
benefits'**

**We analysed our study alongside the UN's
Sustainable Development Goals which also
aim to help brands truly deliver on purpose
and sustainability**



**COLLECTIVE
BENEFITS**



**SUSTAINABLE
DEVELOPMENT
GOALS**

The UN set long-term, ambitious sustainable development goals to help achieve a better world for all, holding all sectors of society accountable.



« Our goal:

By 2030, achieve a better more sustainable future for all! **ENGAGE PEOPLE, COMPANIES AND GOVERNMENTS.** Our 17 sustainable development goals are an urgent call for action »

The SDGs Focus on: People, Planet, Prosperity

17 Sustainable Development Goals (SDGs)



End poverty in all its forms everywhere



Food security, nutrition & sustainable agriculture



Ensure healthy lives and well-being for all ages



Inclusive, quality & lifelong learning for all



Achieve gender equality & empower all women



Achieve sustainable water and sanitation for all



Ensure affordable, reliable, sustainable work for all



Sustained, inclusive and sustainable work for all



Inclusive and sustainable industrialization & innovation



Reduce income inequality within and among countries



Make cities inclusive, safe, resilient & sustainable



Ensure sustainable consumption & production patterns



Regulating emissions and promoting renewable energy



Sustainably use the oceans & marine resources



Protect ecosystems, combat desertification & biodiversity



Promote peaceful & inclusive societies with justice for all



Strengthen partnerships for sustainable development

MB Collective Benefit attributes mapped against the UN SDG Goals helps to identify the path forward for Brands



POVERTY



WOMEN'S RIGHTS



**ANTI-RACISM
DIVERSITY
MIGRANTS
SOCIAL LEADER
LGBT+ RIGHTS**



**RESPECTS NATURE
RESPECTS
ANIMALS**



**FOOD WASTE
FOOD SECURITY**



**SUSTAINABLE
ENERGY**



DEVELOPMENT



HEALTHY LIVES



**BENEFITS THE
ECONOMY
JOBS
GOOD EMPLOYER**



**CLEAN SUPPLY CHAIN
SUST. CONSUMPTION
LOCAL SUPPLIERS
SUST. BRANDS**



**ETHICAL
DATA PROTECTION**



**EDUCATION
IMPROVE ACCESS**



**INVESTS
SUST. INNOVATIONS**



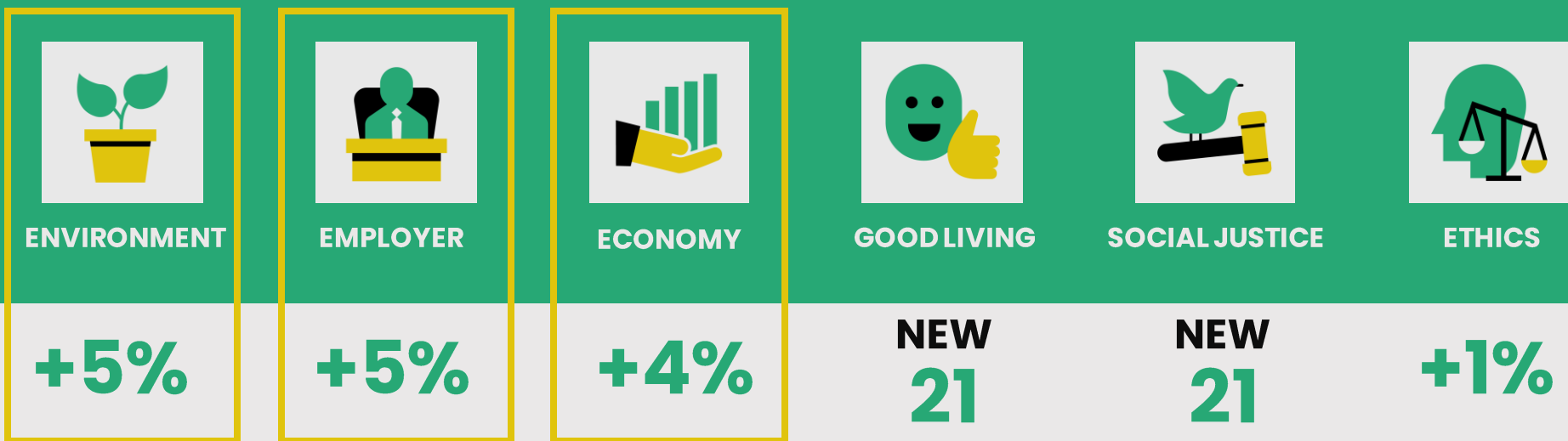
CLIMATE CHANGE

Globally, Consumers increasingly expect brands to strengthen their collective pillar

Three specific dimensions saw a significant increase



COLLECTIVE

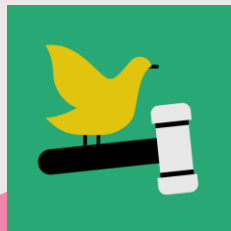


- +5%** Sustainable Consumption
- +3%** Sustainable Energy

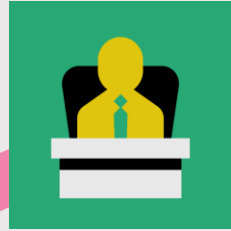
- +3%** Good Employer
- +3%** Invests for tomorrow's economy
- +2%** Jobs

- +3%** Uses local suppliers where possible
- +4%** Fosters the local community development
- +3%** Its business activities benefit the economy of the country today

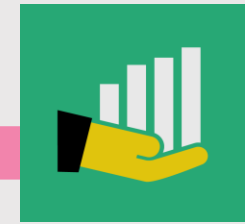
It's not just about jumping on the bandwagon to support the latest social cause



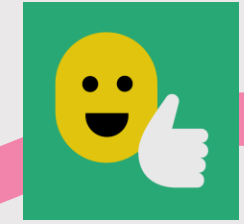
SOCIAL JUSTICE
96



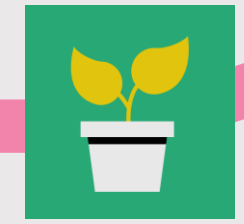
EMPLOYER
100



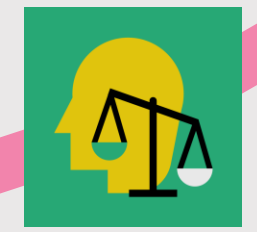
ECONOMY
100



GOOD LIVING
101



ENVIRONMENT
101

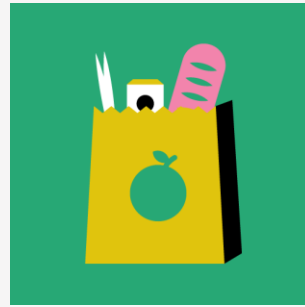


ETHICS
102



Brands should focus on what is most authentic to them

Building a better world starts at home



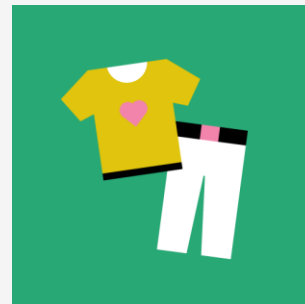
Food

- Zero hunger
- Resp Consumption & production
- Industry, innovation & infrastructure



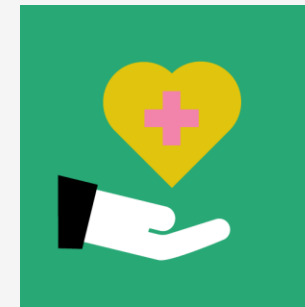
Transport

- Decent work & economic growth
- Resp. Consumption & production
- Industry, innovation & infrastructure



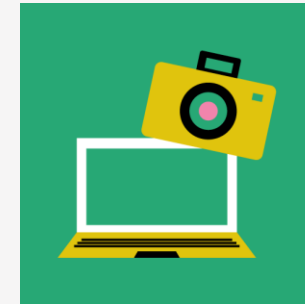
Apparel

- Resp. Consumption & production
- Reduced inequalities
- Industry, innovation & infrastructure



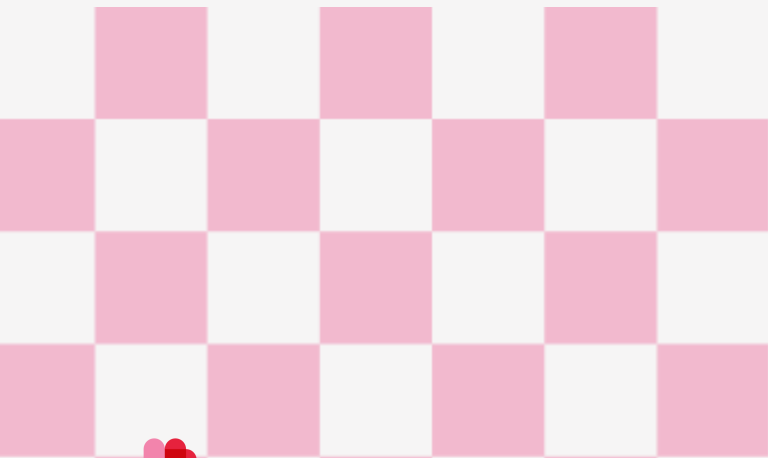
Healthcare

- Good health & well-being
- Decent work & economic growth
- Resp. Consumption & production



Consumer electronics

- Decent work & economic growth
- Industry, innovation & infrastructure
- Resp. Consumption & production



What key area should your Brand focus on?

The overlay helps easily pinpoint where Brand deficits and opportunities lie

 <p>1 NO POVERTY</p>	POVERTY	 <p>5 GENDER EQUALITY</p>	WOMEN'S RIGHTS	 <p>10 REDUCED INEQUALITIES</p>	ANTI-RACISM DIVERSITY MIGRANTS SOCIAL LEADER LGBT+ RIGHTS	 <p>14 LIFE BELOW WATER</p>	RESPECTS NATURE RESPECTS ANIMALS
 <p>2 ZERO HUNGER</p>	FOOD WASTE FOOD SECURITY	 <p>7 AFFORDABLE AND CLEAN ENERGY</p>	SUSTAINABLE ENERGY	 <p>11 SUSTAINABLE CITIES AND COMMUNITIES</p>	DEVELOPMENT	 <p>15 LIFE ON LAND</p>	
 <p>3 GOOD HEALTH AND WELL-BEING</p>	HEALTHY LIVES	 <p>8 DECENT WORK AND ECONOMIC GROWTH</p>	BENEFITS THE ECONOMY JOBS GOOD EMPLOYER	 <p>12 RESPONSIBLE CONSUMPTION AND PRODUCTION</p>	CLEAN SUPPLY CHAIN SUST. CONSUMPTION LOCAL SUPPLIERS SUST. BRANDS	 <p>16 PEACE, JUSTICE AND STRONG INSTITUTIONS</p>	ETHICAL DATA PROTECTION
 <p>4 QUALITY EDUCATION</p>	EDUCATION IMPROVE ACCESS	 <p>9 INDUSTRY, INNOVATION AND INFRASTRUCTURE</p>	INVESTS SUST. INNOVATIONS	 <p>13 CLIMATE ACTION</p>	CLIMATE CHANGE		

Based on the outcome, brands can focus their efforts on the areas of opportunity that are most essential for them to address



COLLECTIVE BENEFITS

Attributes Identified

- e.g.
- Education
 - Improve access

UN SDG GOAL



UN SDG RESOURCES

Education

Tied to Principles: 1 2

Investing in education is essential to developing a skilled workforce for the future and improving economic growth. Although the number of children in the world has grown, the number in primary schools has not changed. Even those who do attend school don't always learn to read and write. Discrimination still keeps some children and adults from quality learning opportunities. This occurs despite international affirmation of the right to education.

Constrained educational resources and poverty often limit access to education. Additionally, the skills students learn in school don't always match up with workplace needs.

Quality Education

Goal 4. Ensure inclusive and equitable quality education and promote lifelong learning opportunities for all

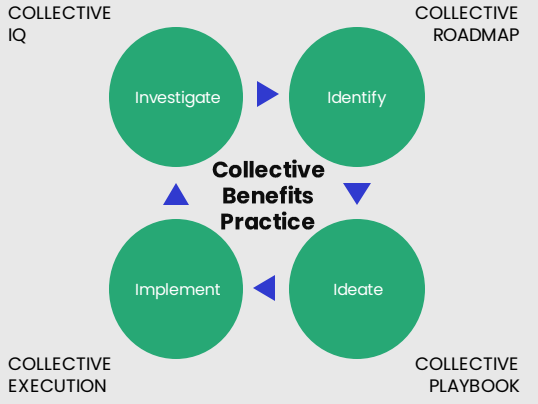
- Why business should support education
- A Framework for Business Engagement in Education
- Children's Rights and Business Principles
- Principles for Responsible Management Education
- From our library
- Additional Tools: SDG Compass; SDG Matrix

HAVAS EXPERTISE

Investigate > Identify > Ideate > Implement

COLLECTIVE BENEFITS

Our bespoke approach to boosting a brand's Collective Benefits



The **Collective Benefits Practice** comprises 4 stages with individual inputs

- e.g.
- Clean supply chain
 - Sustainable Consumption
 - Local Suppliers
 - Sustainable Brands



Supply Chain Sustainability

A company's entire supply chain can make a significant impact in promoting human rights, fair labour practices, environmental progress and anti-corruption policies.

However, UN Global Compact participants rank supply chain practice challenge to improving their sustainability performance. Extending its Company's Ten Principles into the supply chain can be difficult because of the complexity of many supply chains.

The UN Global Compact encourages companies to make sustainable the top of the organization. If the chief executive sees the supply chain of their workforce and community, the company can set expectations, practices across its supply chain. These can include key areas such as training, auditing and remediation.

Doing so promotes a broader understanding within an organization of made, beyond procurement, can affect the supply chain. For example, product developers and marketing all can have an impact. In addition, training, auditing and remediation.

Responsible Consumption and Production

Goal 12. Ensure sustainable consumption and production patterns

- Why business should support supply chain sustainability
- Global Compact Management Model
- Global Reporting Initiative
- From our library
- Additional Tools: SDG Compass; SDG Matrix

Age of Cynicism


QUESTIONS TO CONSIDER

GAIN TRUST THROUGH TRANSPARENCY

- How trustworthy is your brand considered to be based on past and current actions? Are there / Where are the gaps?
- Do your communication goals align with your brand heritage?
- What specific collective attributes connect with your brand that enables you to organically get more involved?
- How can your brand's content strategy more authentically connect with consumers?

PURPOSE OVER PROFIT

- How can your client leverage the Havas 'Collective Benefits' Tool to better inform communication strategies?
- What SDG's are the lowest hanging fruit that your brand can genuinely align to and consider to take greater action?
- What are first steps your brand can take to workshop a gap analysis on your current sustainability standing vs. the SDGs?



MEANINGFUL
BRANDS

The Age of Cynicism

Additional Observations

Observations
Observations
Observations
Observations
Observations
Observations
Observations
Observations
Observations
Observations

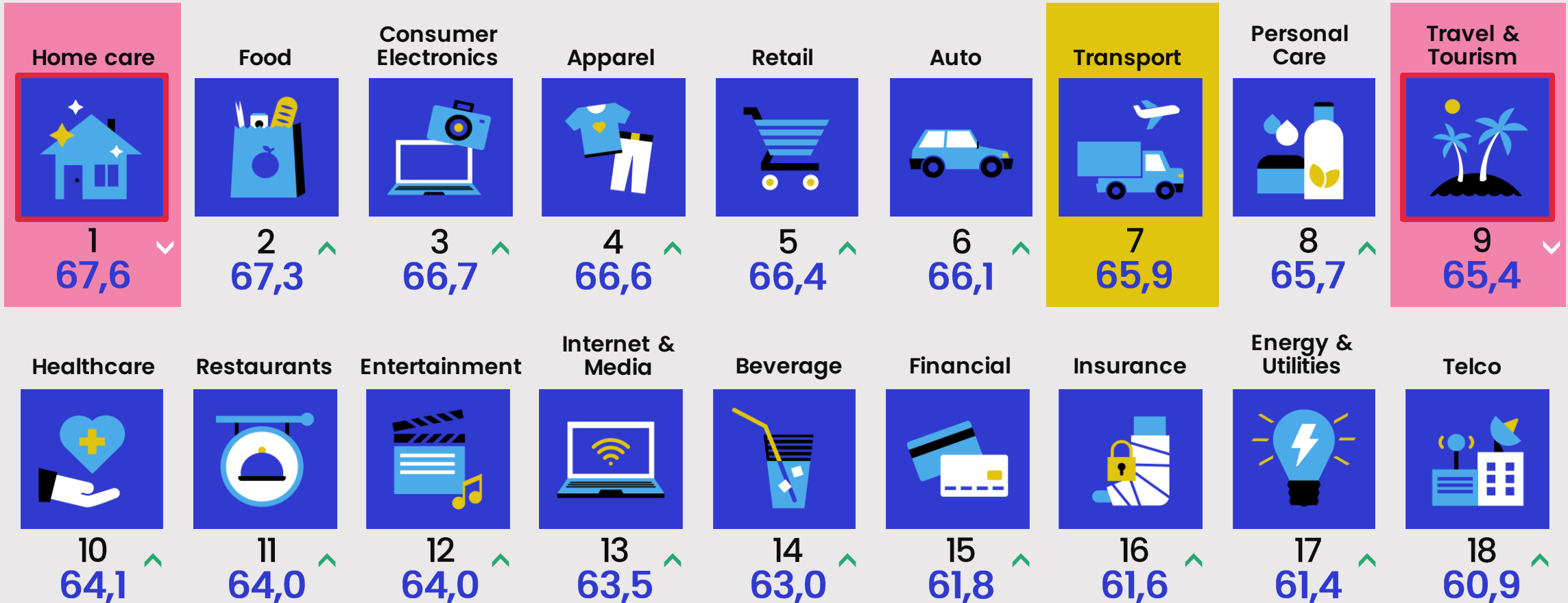
Brands' status elevated by increasing **Personal and Collective** benefits

Top 30 Brands



66%

of Consumers want
more meaningful
experiences

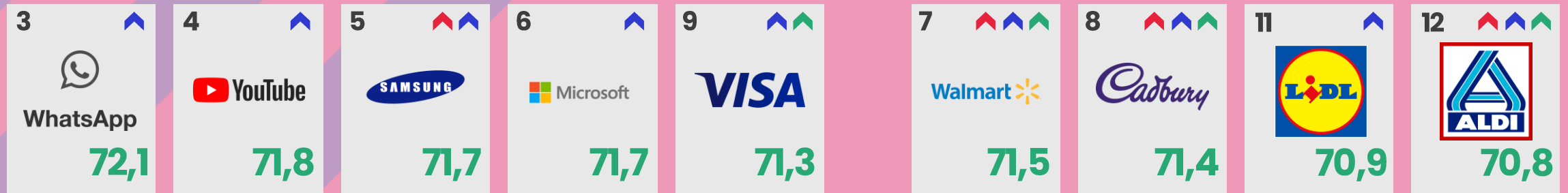
Overall, most categories gain in meaningful scores



Most Meaningful Global Brands 2021

1  75,0	2  72,9	3  WhatsApp 72,1	4  YouTube 71,8	5  71,7	6  Microsoft 71,7	7  71,5	8  71,4	9  71,3	10  71,1
11  70,9	12  70,8	13  70,4	14  70,3	15  70,3	16  70,2	17  70,0	18  69,9	19  69,6	20  69,6
21 New in 2021  69,5	22  69,5	23  69,4	24  69,4	25  69,4	26  69,3	27  69,1	28  69,0	29  69,0	30  68,9

Brands that focus on **personal** and **collective** benefits resonate more with Consumers



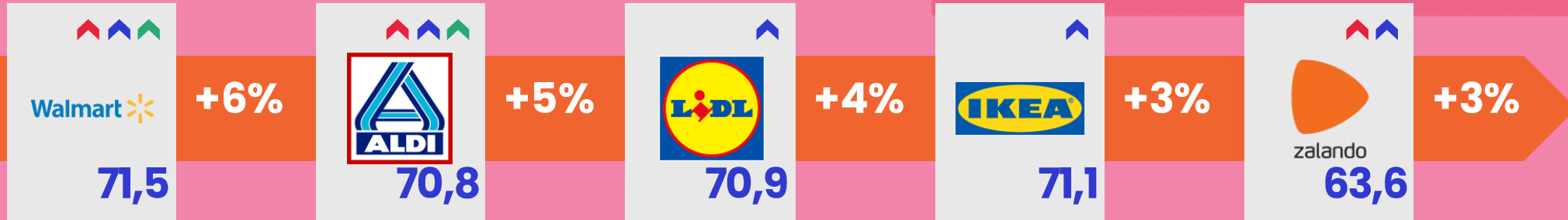
2019: #4 #5 #6 #9 #18



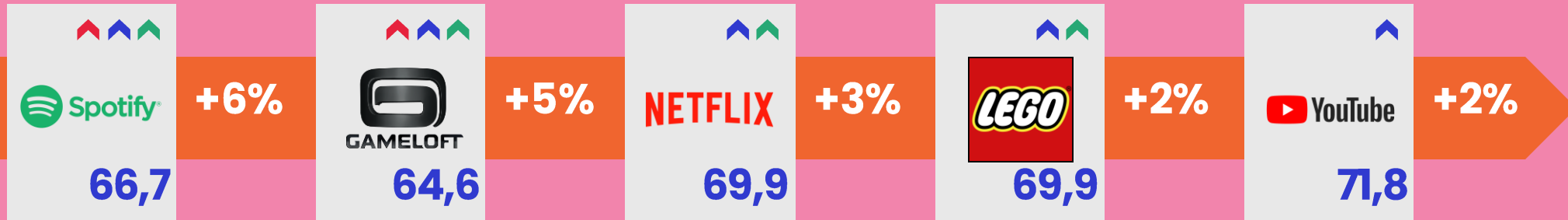
2019: #23 #24 #22 #19 #30

The categories and brands that saw accelerated growth is not surprising given the behavioral changes shaped by the cultural backdrop

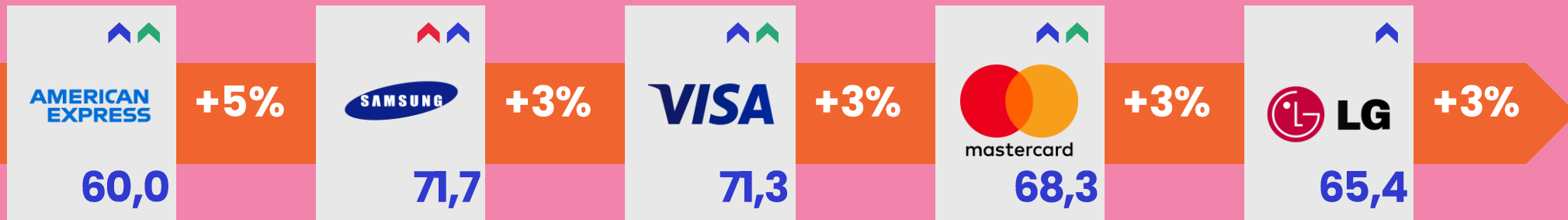
ACCESSIBLE RETAIL



HOMETAINMENT



TECH SOLUTIONS



2

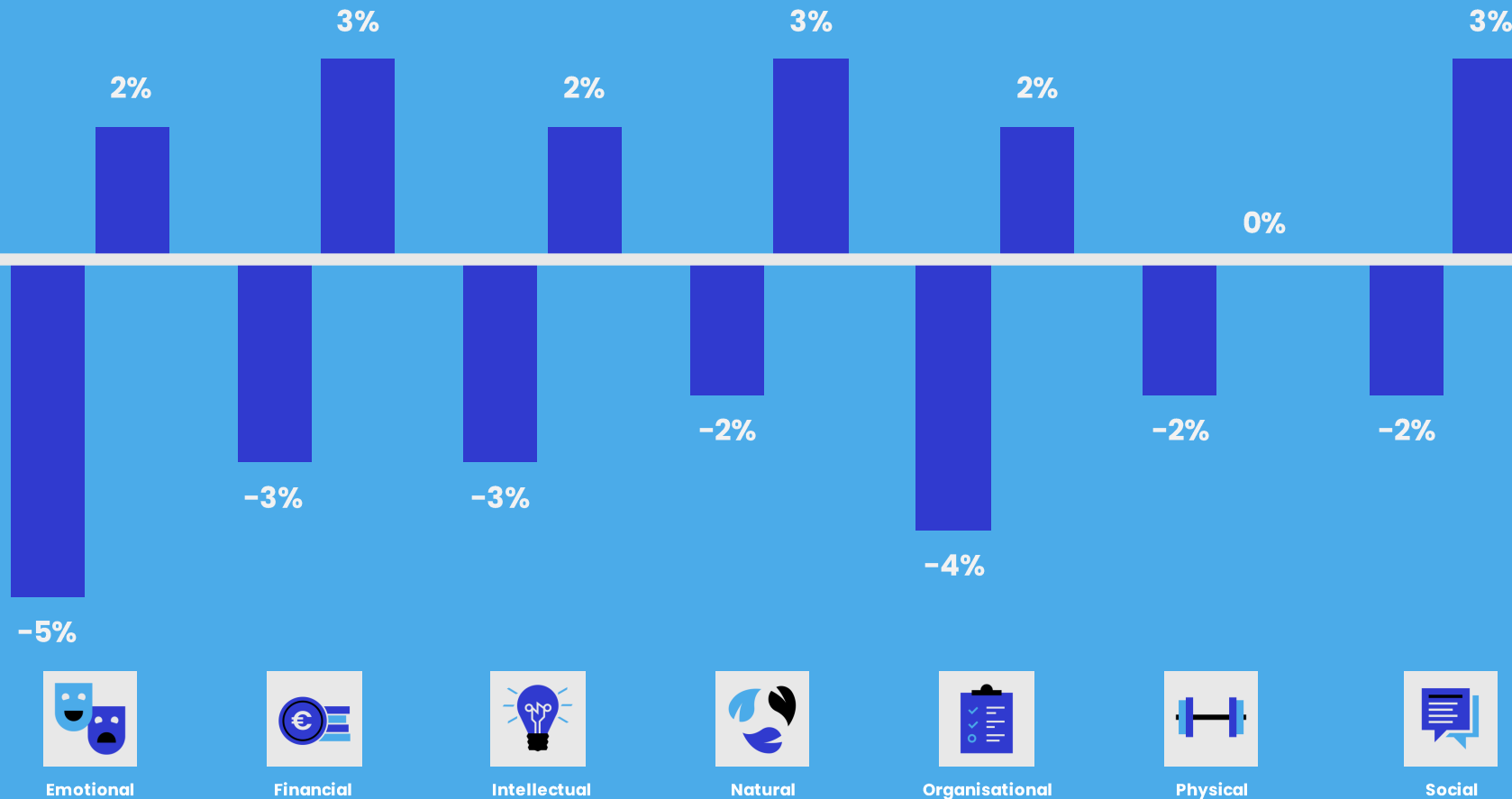
**There are
immediate
opportunities to
forge
meaningful
connections in
the short term**

77%

of Consumers expect
Brands to show
support to people in
times of crisis

The crisis brought a greater need for **personal benefits** to be met today

Evolution 2017-2019 & 2019-2021



Emotional

Financial

Intellectual

Natural

Organisational

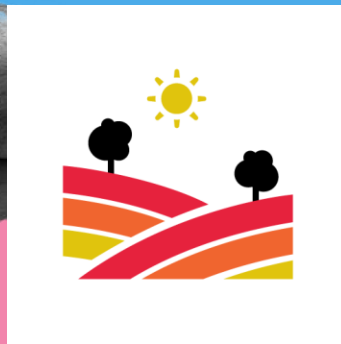
Physical

Social

Consumers expect brands to help in decreasing life's stressors

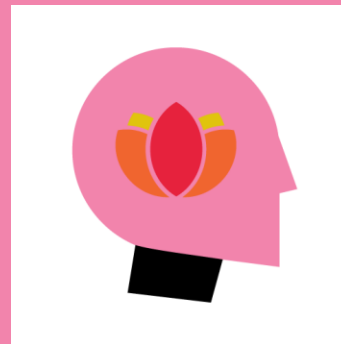


109



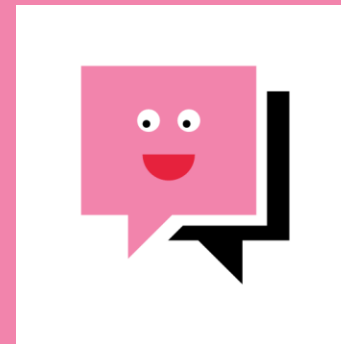
Makes my life easier

106



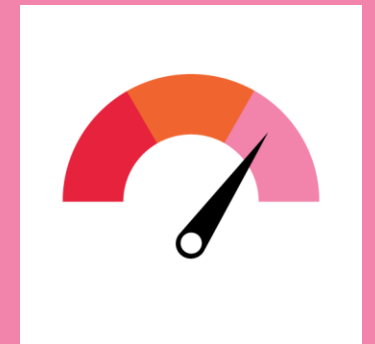
Gives me peace of mind

105

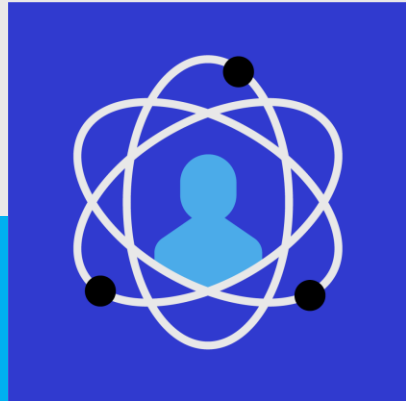


Helps me feel truly happy

105

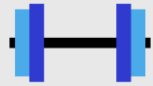


Helps me feel content in my daily life



PERSONAL

PHYSICAL



SOCIAL



NATURAL



FINANCIAL



ORGANISATIONAL



INTELLECTUAL



EMOTIONAL



=

+3%

+3%

+3%

+2%

+2%

+2%

**Specific dimensions have also
increasingly
become more in demand**

- CORRELATED WITH QOL METRICS



SOCIAL

+3%

Makes me feel part of a group

+3%

Helps me to share experiences/moments with others

+2%

Helps me to connect with people and/or meet new people



NATURAL

+4%

Inspires me to make the world a better place

+2%

Enables me to be more environmentally friendly



FINANCIAL

+3%

Helps me save money

+3%

Helps me grow my wealth

The attributes within each that have become more important to consumers, follow the theme of focusing on people, the planet, and prosperity

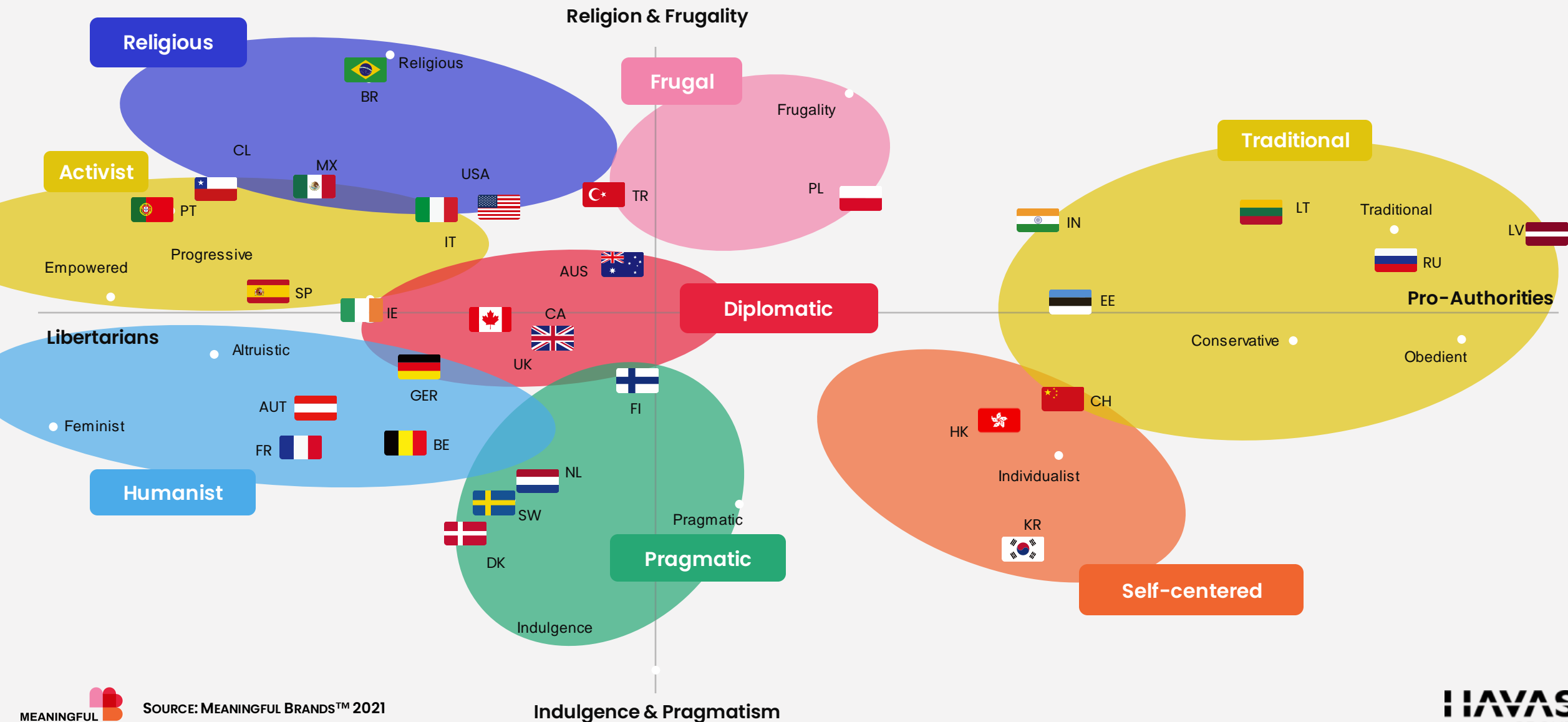
- CORRELATED WITH QOL METRICS

East Meets West

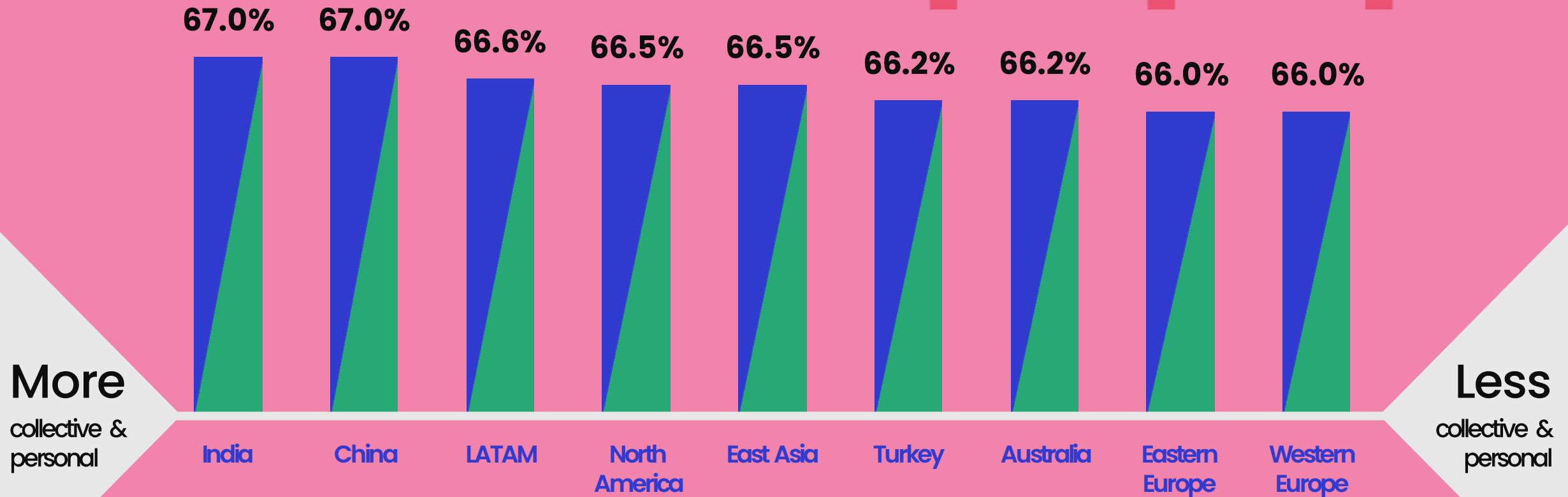
Cultural intricacies matter:

'we' vs. 'me' mentality influences expectations

Cultural ethos defines what is right in societies



There is a high expectation in the East and West for **Collective** and **Personal** Benefits



More
collective &
personal

Less
collective &
personal

Personal Benefits:

After organizational and emotional benefits, unsurprisingly, consumers in APAC seek to connect while Western countries seek more individual gains



- CORRELATED WITH QOL METRICS

Collective Benefits:

Clearly influenced by the impacts of the cultural landscape specific to a region, morality is top of mind for Western countries while Asian countries place top importance on the environment

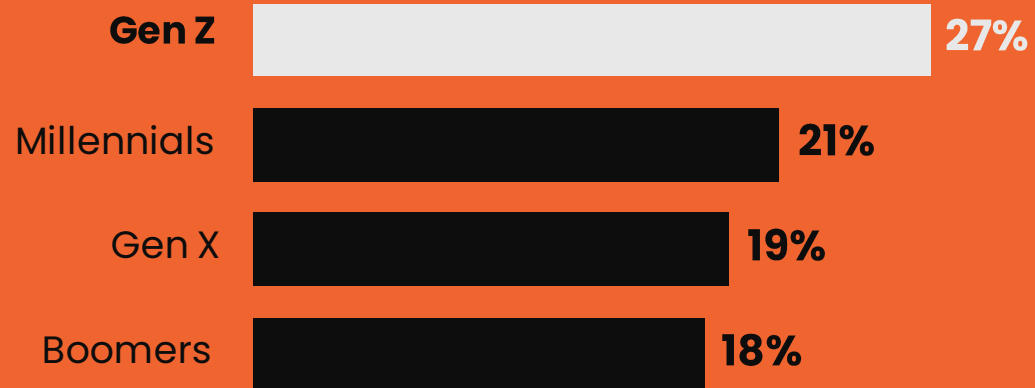


- CORRELATED WITH QOL METRICS

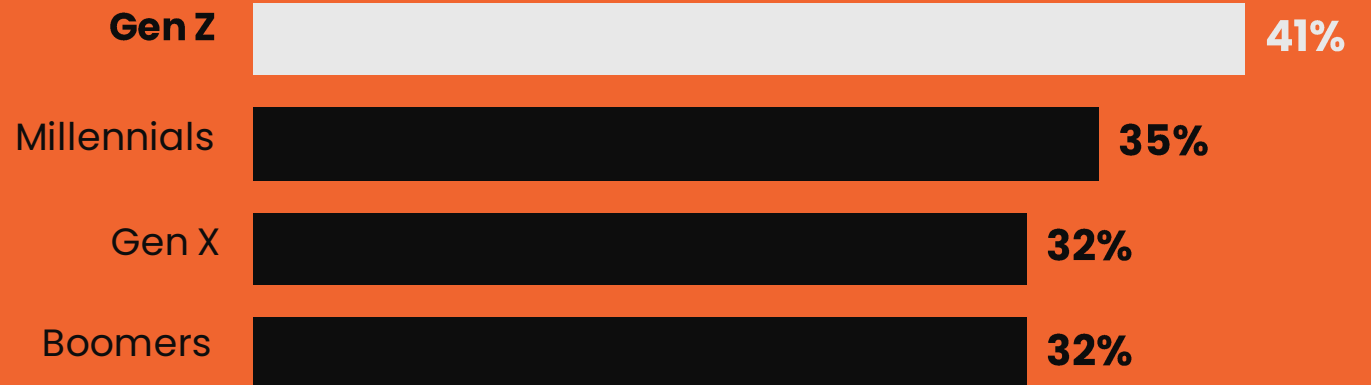
Gen Z is an open-minded generation who seek individuality and don't mind questioning society 'rules'

Gen Z are more likely to speak their minds and challenge traditional constructs than other generations

PEOPLE SHOULD DARE TO DISOBEY AND PROVOKE TO REALLY HAVE A SAY



SEX-ROLES ARE PURELY SOCIAL CONSTRUCTIONS (OUTSIDE CHILDBEARING)



**Brands that
enable them to
convey their
individuality
pique their
interest**

55%

**are looking for
differentiated products
and services which allow
them to express their
individuality**

vs. 36% Boomers

Gen Z is particularly focused on Reduced inequalities

Inclusion and Expression of Self are of paramount importance for this generation

GEN Z



109



109



107

TOTAL POPULATION



107



106



105

BOOMERS (+56 YO)



109



108



106

Gen Z have extra heart for brands that take effective action and are accepting of all people

Takes a lead on social issues

105

Embraces diversity

102



5

Meaningful Content:

Nearly half of content fails to deliver

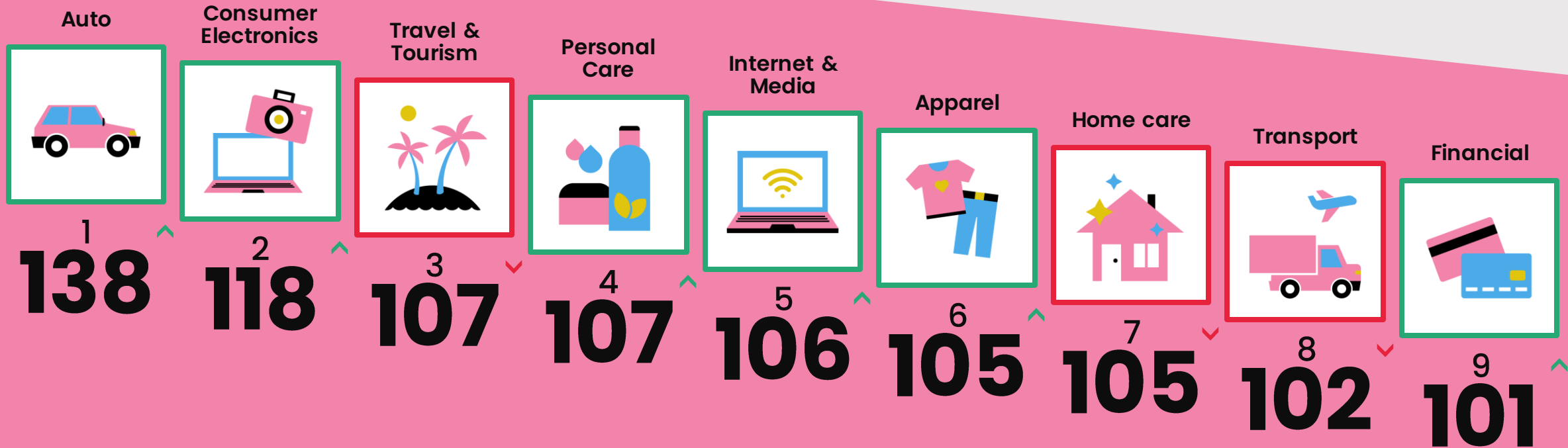
Compared to pre Covid, 'Help' Content is on the rise

48%

of the content provided by Brands is not meaningful to Consumers

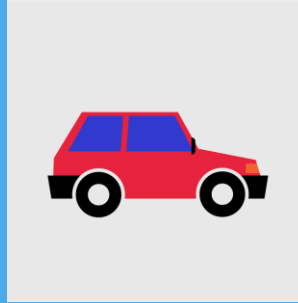
Content effectiveness varies by industry

Categories that had limited engagement due to govt safety measures were negatively impacted



The most expected roles of content are **to Reward and Inspire**

AUTO



1. Help
2. Inform
3. Reward

APPAREL



1. Reward
2. Entertain
3. Inspire

BEVERAGE



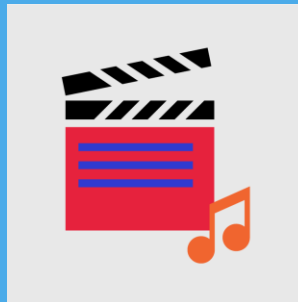
1. Entertain
2. Reward
3. Inspire

FOOD



1. Help
2. Inspire
3. Reward

ENTERTAINMENT



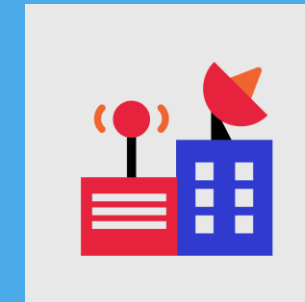
1. Reward
2. Entertain
3. Inspire

INTERNET & MEDIA



1. Entertain
2. Inspire
3. Help

TELCO



1. Help
2. Reward
3. Inform

PERSONAL CARE

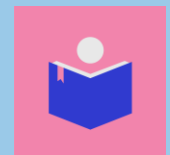


1. Help
2. Inspire
3. Inform

Standard
Already fulfilled

Least
expected

Secondary
Do not focus
only here



EDUCATE

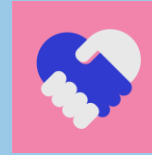


ENTERTAIN



INSPIRE

Most
associated



HELP



INFORM

Must Have
Have to be there

Most
expected



REWARD

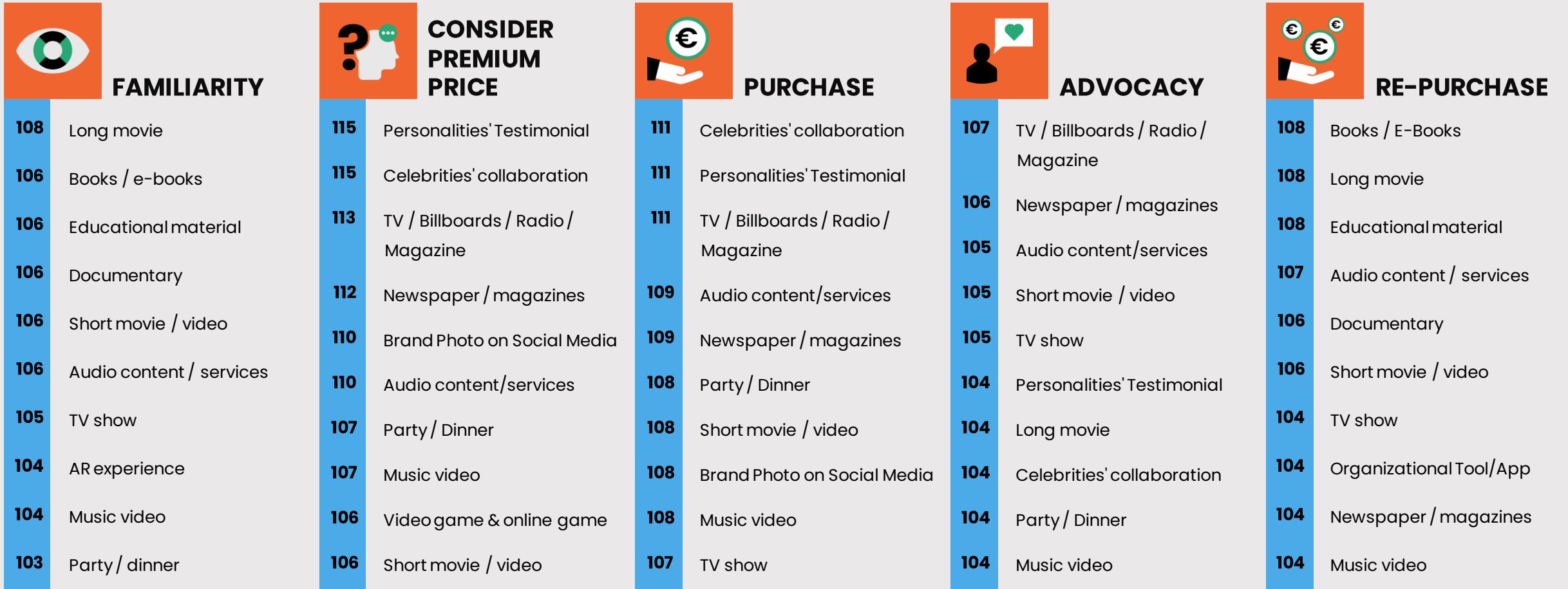
Opportunity
Potential
differentiation
lever

Least
associated

However,
HELP is the
content role
that grew in
importance
and topped
the list of
content
expected from
Global Brands

What you say is as important as how you say it

ASSOCIATED CONTENT TYPE ACROSS DIFFERENT POINTS IN A CONSUMER DECISION JOURNEY



THANK YOU
THANK YOU
THANK YOU
THANK YOU
THANK YOU
THANK YOU
THANK YOU
THANK YOU

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