



## MEANINGFUL BRANDS

TWELVE YEAR STUDY EXPLORING HOW BRANDS TANGIBLY IMPROVE PEOPLES' LIVES FUNCTIONALLY, ENHANCE THEIR PERSONAL WELL-BEING, — AND CONTRIBUTE TO WIDER SOCIETY.





# 2023 New edition of Havas Meaningful Brands

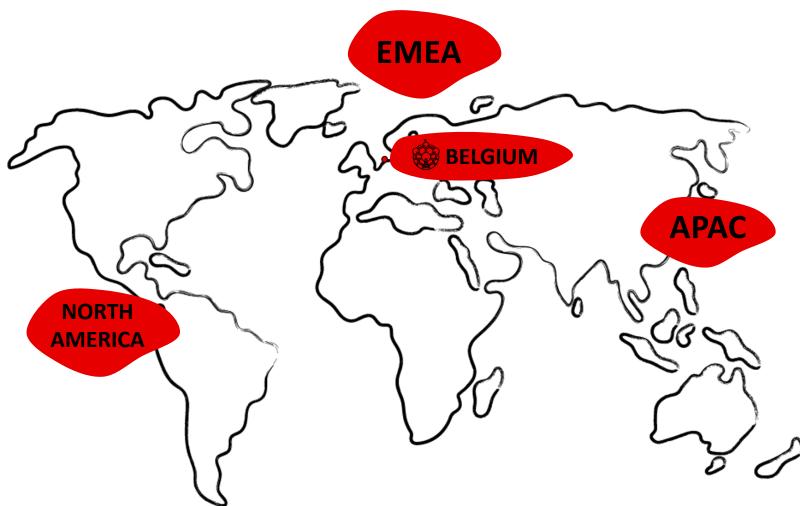
Belgium Citizens: 7.000+

Brands: **225** 

Categories: 13

Powered by









# The Meaningful Brands™ study is unique within the industry

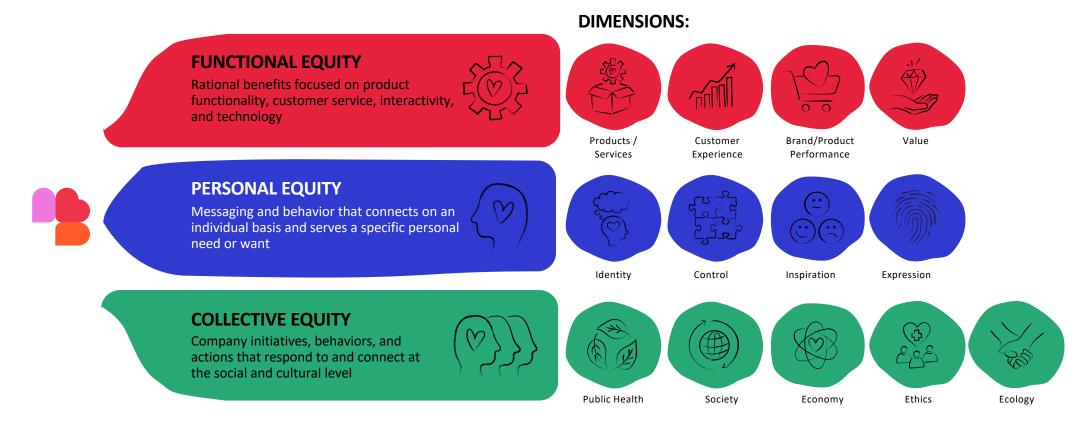
- Now in its 15th year, the study explores how brands tangibly improve peoples' lives functionally, enhance their personal well-being, and contribute to wider society
- Launched in 2009, it was the FIRST GLOBAL FRAMEWORK to connect brands with human well-being
- Explores PROPRIETARY METRIC of brand strength for business and marketing planning
- Helps identify how and where to MEANINGFULLY ENGAGE with people through customer, brand and media experiences





## A Tangible Definition of 'Meaningful'

Understanding what matters across 3 pillars and 14 dimensions







#### ATTRIBUTES ARE THE HEART OF OUR STUDY'.

Functional Attributes
Acts like a leader
Acts like a challenger
Has products/services that have earned a good reputation
Delivers what it promises/says
Offers a simple and easy customer experience
Offers a simple and easy digital customer experience (B)
Offers an excellent purchase experience
Respects my personal data
Treats customers with respect (B)
Offers exclusive experiences (B)
Offers good quality products/services
Has a range of products/services that are well suited to meet my needs
Is innovative and always coming out with fresh, new products/services
Offers safe products/services (B)
Offers products/services that no other brands can offer (B)
Offers good value for money
Offers consistent prices across time and countries (B)

Personal Attributes	
Helps me feel more in control of my day-to-day life	
Helps me simplify my life	
Enables me to be smarter with my money and/or time (B)	
Makes me feel like it is looking after my best interests (B)	
Gives me a sense of happiness	
Makes me feel more confident	
Gives me a sense of peace of mind	
Helps me feel good about myself	
Helps me connect with others	
Helps me express myself as an individual	
Makes me feel more attractive and stylish (B)	
Makes me feel special and unique (B)	
Inspires me to take a healthier approach to my life	
Inspires me with new ideas and possibilities	
Helps me feel energized and alive (B)	
Lets me escape from the everyday (B)	

Collective Attributes
invests in innovative, sustainable and ethical solutions
Promotes and inspires sustainable, responsible behaviors and consumption
s committed to making products/services more sustainably
Promotes sustainable use of forests & land / seas & oceans
Offers sustainable brands and products (B)
Respects all living creatures (cruelty-free products, not tested on animals or vegan) (B)
is considered to be a good place to work
Positively contributes to the national economy and my local community
s transparent and honest in its activities and communications
Behaves ethically and with integrity
Fights against poverty and hunger
Supports healthy living and promotes well being
Ensures food security and improved nutrition (B)
s a great supporter of culture and education
Actively promotes and supports equality, diversity and inclusion in society

Proactively supports social issues and good causes

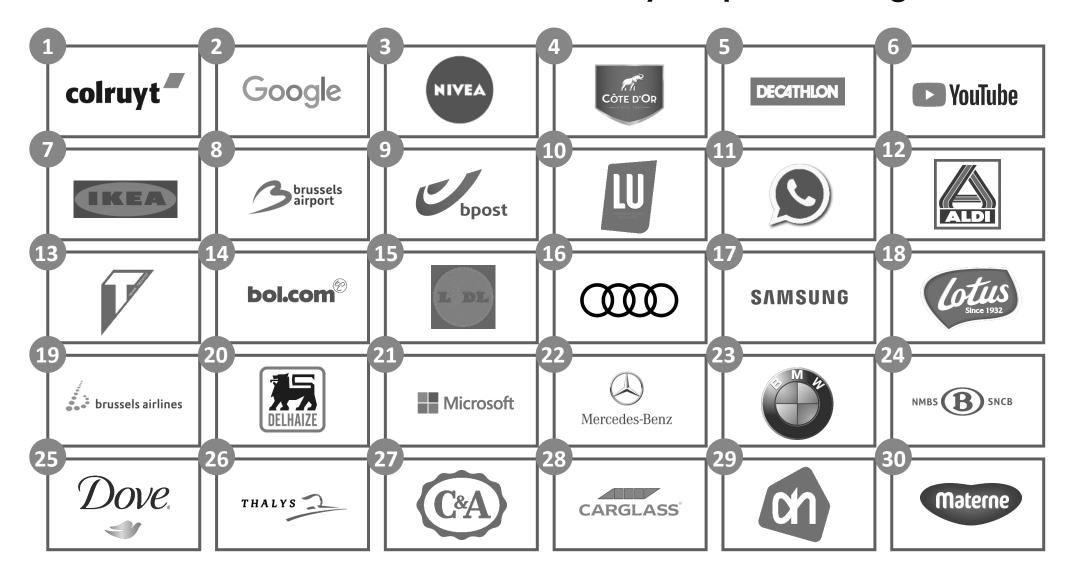






### PREVIOUSLY ON MEANINGFUL BRANDS 2021

The tech & retail sectors dominated... followed by deep-rooted Belgian brands.

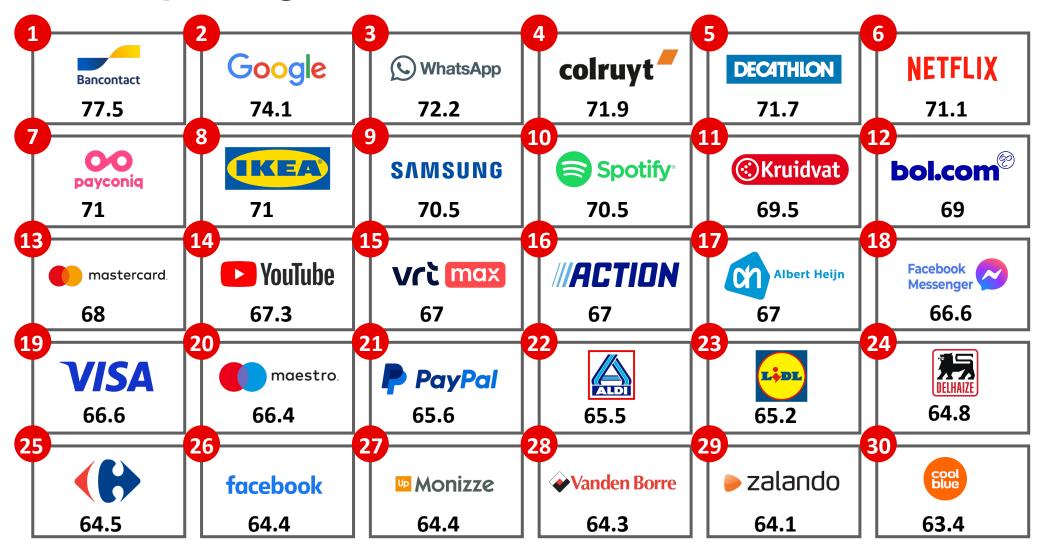






## MEANINGFUL BRAND CATEGORY RANKING 2023 Colruyt's reign is over... Bancontact take the lead







# TANGIBLE IMPACT ON CONSUMERS. THEIR BEHAVIOR IS CHANGING, AND WITH IT, THEIR NEEDS...



#### THE IMPORTANCE OF THE FUNCTIONAL PILLAR DECLINES COMPARED TO 21:

PERSONAL AND COLLECTIVE BECOME STRONGER WITH CONTROL ATTRIBUTES (SIMPLIFY, WEALTH,...) AND POSITIVE IMPACT ON THE LOCAL ECONOMY

BENEFITS

Comfortable clothes

Tools & services

Quality Prods

Compatibility

Fix cuts

2021

IN 2021, THE FUNCTIONAL PILLAR WAS BY FAR THE MOST IMPORTANT FOR CONSUMERS



**FUNCTIONAL** 



**32**%

## **26**%

#### PERSONAL

#### **BENEFITS**

- Relaxed
- Life Easier
- Best interests
- Peace of Mind
- Self expression

#### COLLECTIVE

#### Improve access

**BENEFITS** 

- Transparent
- Sust. Brands
- Good employer
- Data protection

2023

#### **PERSONAL:**

Gaining in importance due to successive crises. "Simplify", "peace of mind" and "Escape".

#### **COLLECTIF:**

The collective is growing in importance and focusing on two themes. Local and environmental issues



#### **FUNCTIONAL**

#### BENEFITS

Purchase experience

Quality Prods

Good reputation

In store experience

#### PERSONAL

#### BENEFITS

Simplify

Peace of Mind

Escape

Happiness

Wealth

#### COLLECTIVE

#### BENEFITS

Good employer

Innovative, sustainable and ethical solutions

Benefits the Economy

Respects Animals

Culture and education





## Excellent performances on the functional is the bare minimum! Personal pillars is a must.

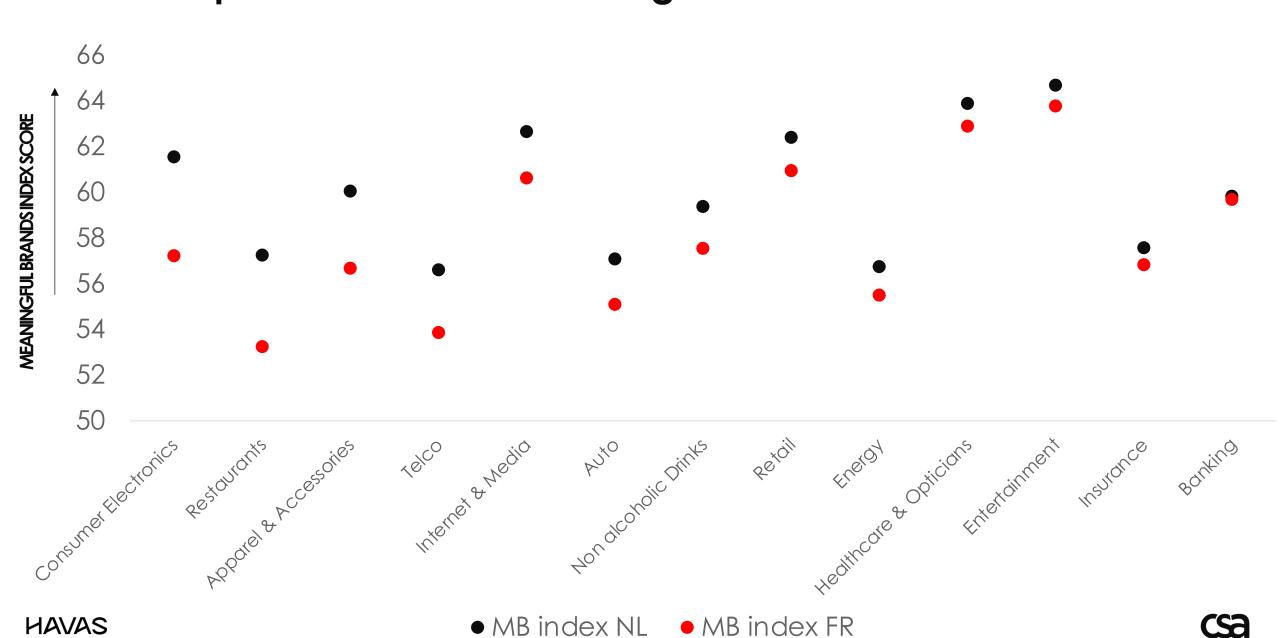
Major digital platforms & GAFAM are the last to resist the collective requirements

Meaningful ++ Meaningful  ← Meaningful												
	Bancontact	Google	€ WhatsApp	colruyt	DECATHION	NETFLIX	payconiq		SAMSUNG	Spotify		
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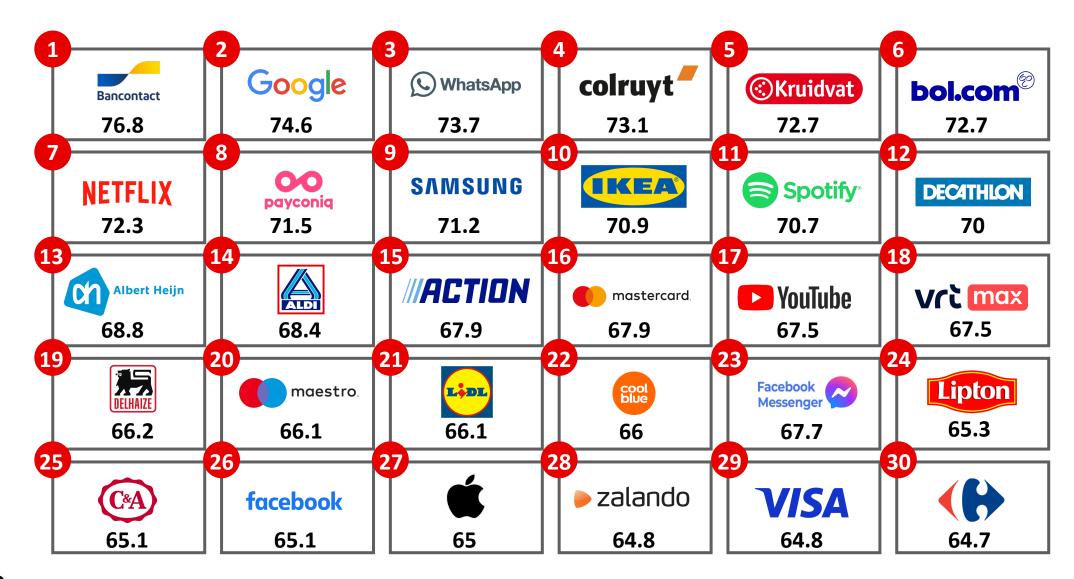
#### Brands are perceived as more meaningful in the north than in the south





#### Kruidvat, Bol.com, Albert Heijn rise in the ranking in the North. Bancontact and digital platforms still lead the way





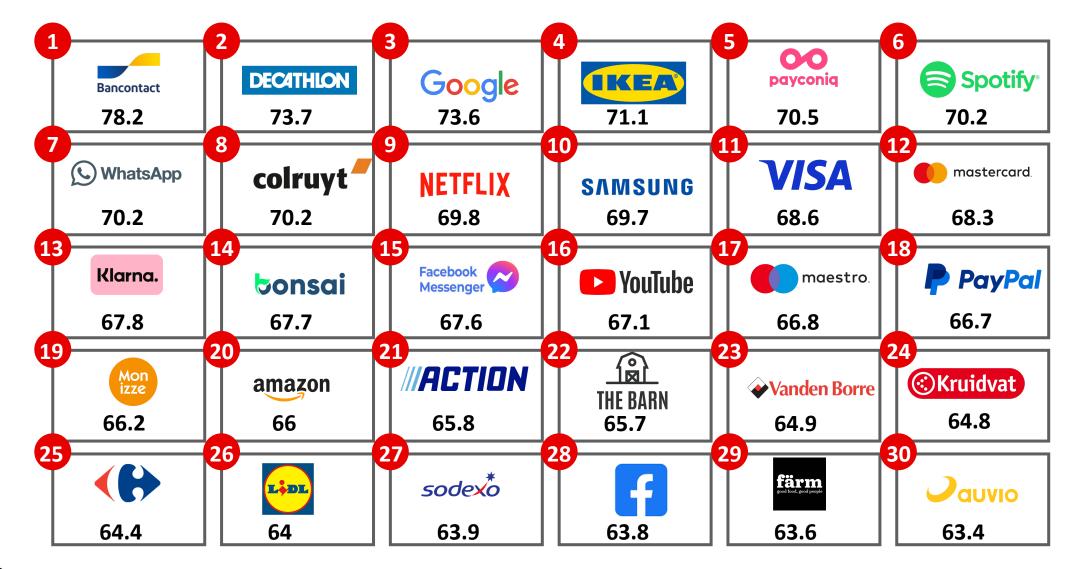


## Decathlon in the <u>South</u>.



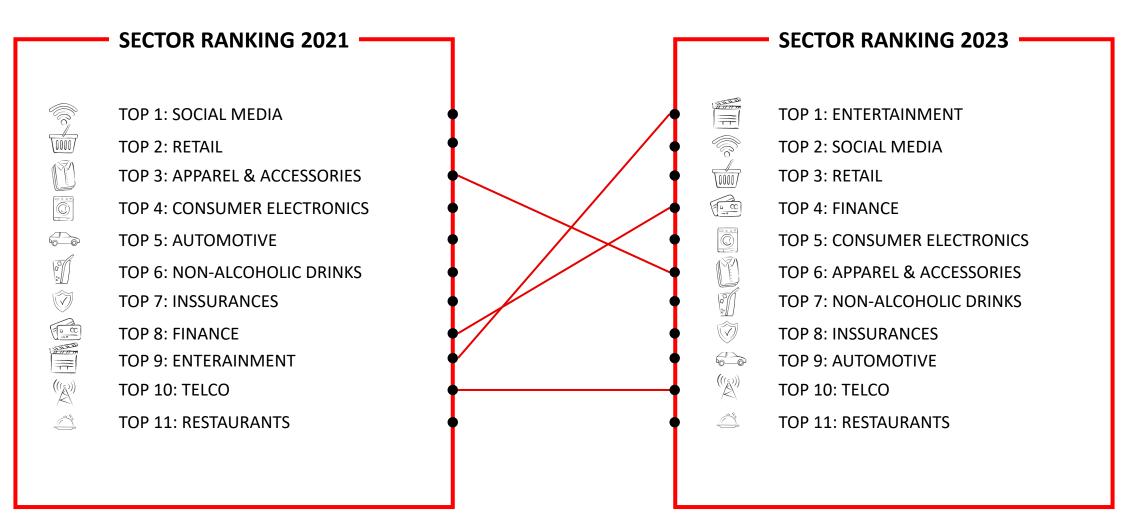






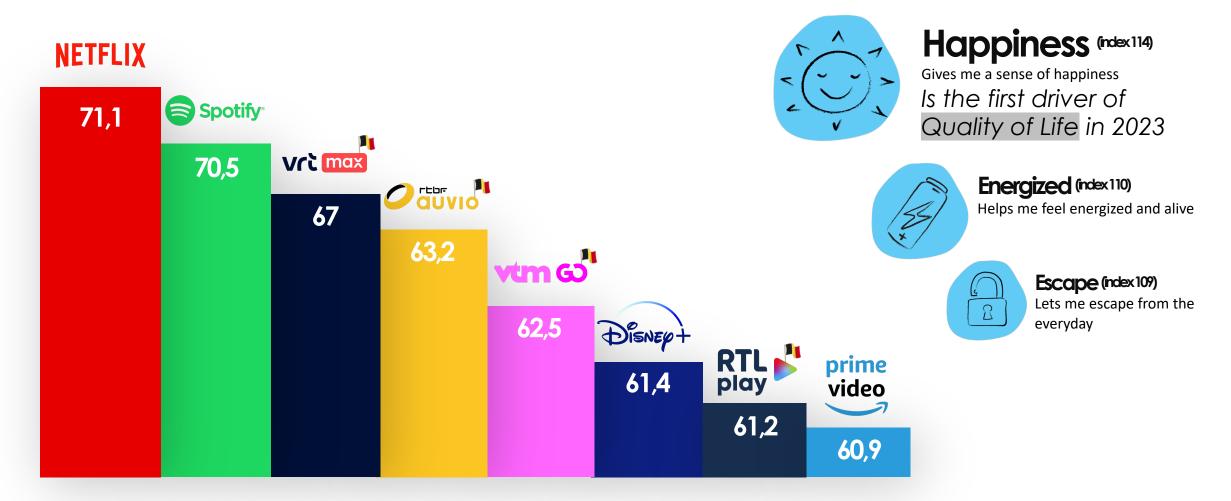


## THE 2023 EDITION SEES THE RISE OF THE ENTERTAINMENT AND FINANCE SECTORS... TWO MAJOR ISSUES IN TIMES OF CRISIS.





## Happiness is a core brand benefit! Through entertainment, consumers have found a much-needed escape from the world's troubles.







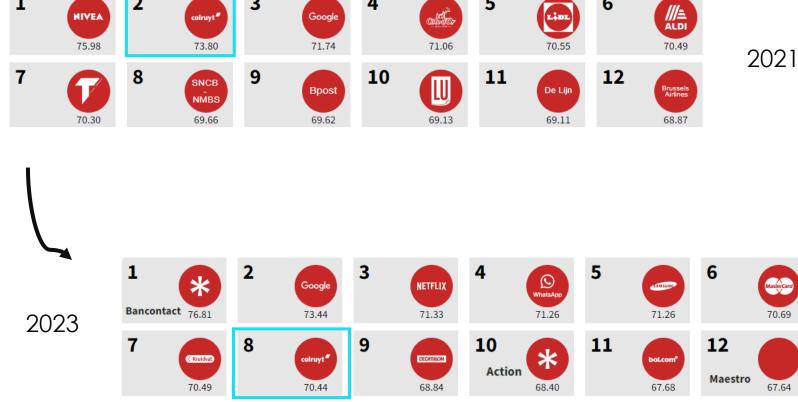






#### 55+ GLOBAL RANKING

Among 55+, Colruyt falls from 2th to 8th in 2023. This result confirms that among the Belgians (even if less strongly among the 55+), the brand has undergone a relative decline in 2023.



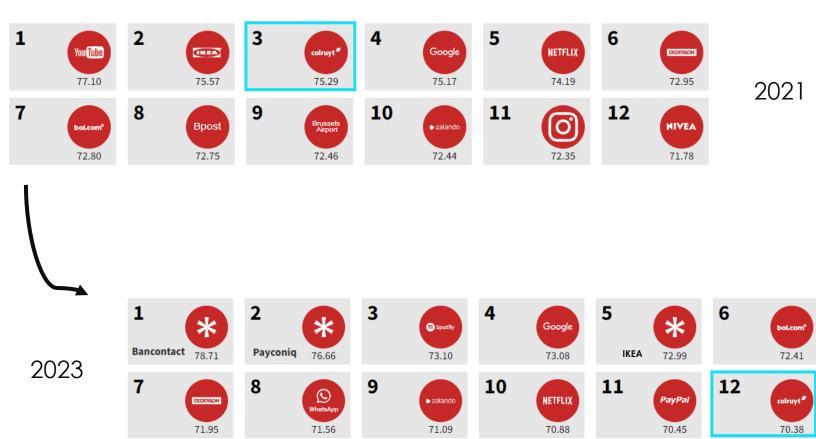






#### 18-35 GLOBAL RANKING

Among young people, Colruyt falls from 3th to 12th in 2023. This drop in meaningfulness is the first indicator of the impact of successive crises and the growing importance of more resilient brands.

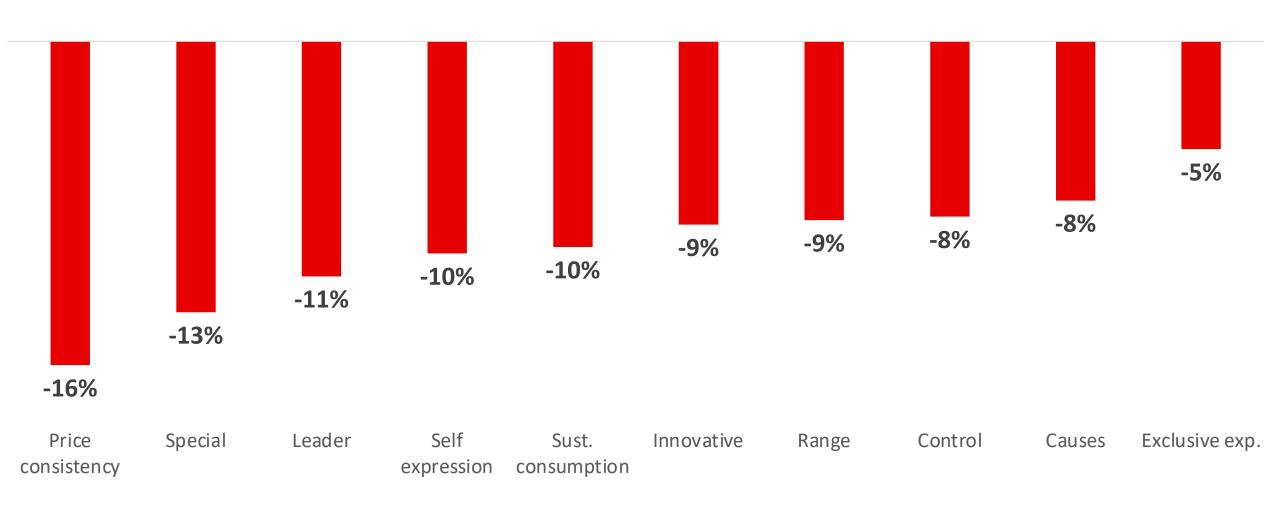






#### Colruyt: listing of evolutions by attribute on the three pillars

Biggest fall in attributes performance 21 vs 23 are "price consistency", "Special", "Leader", and "self expressions"







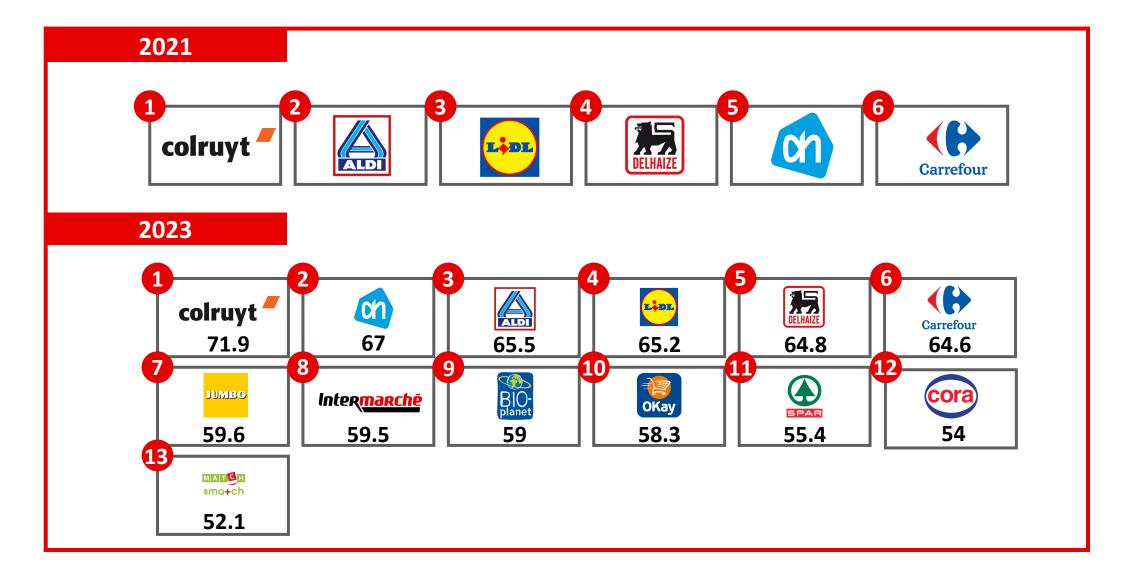
## STABILITY IS FINE IN A CHANGING WORLD

# HOWEVER, THE BOLD PLAYERS WHO ADAPTED IN THIS PERIOD ARE BETTER REWARDED.

## COLRUYT AND CARREFOUR HOLD STEADY, ALBERT HEIJN RISES IN THE RANKING! THE RETAIL SECTOR EXPERIENCED VOLATILITY



BE

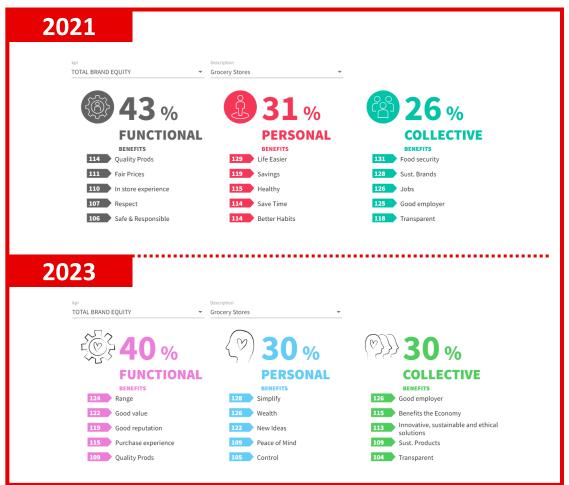




## NL FR

## Shifting from functional to collective in the North and from functional to personal in the South

NORTH SOUTH



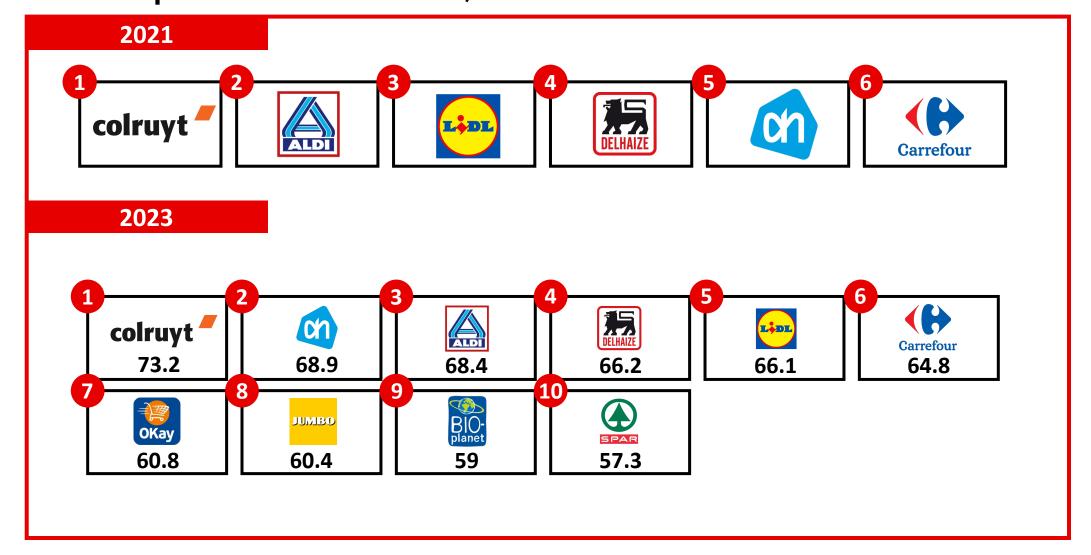








## Colruyt is stable in the <u>North</u>. Albert Heijn clearly stands out, taking second place ahead of Aldi, Delhaize and Lidl.

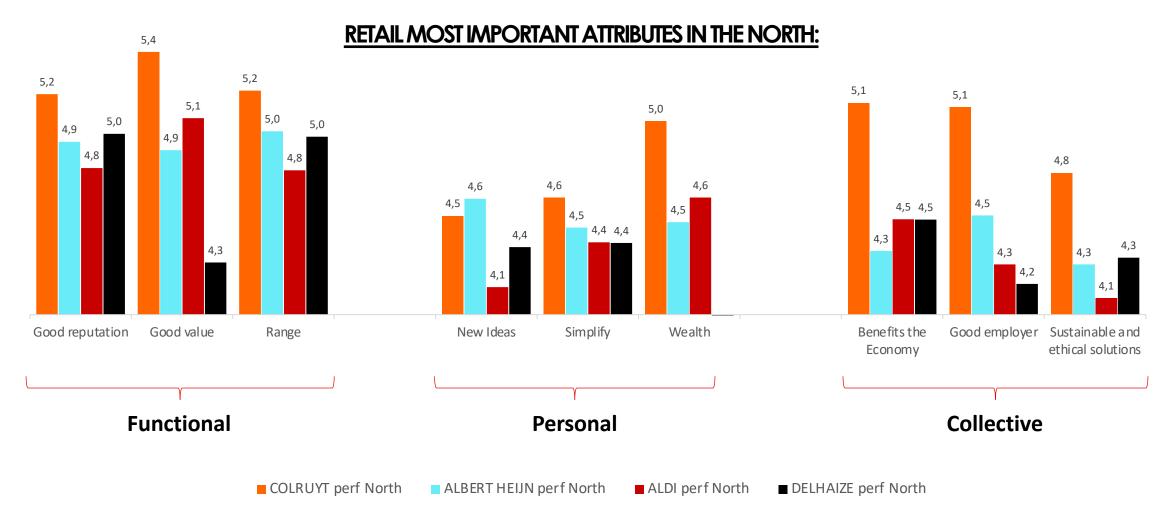






## **COLRUYT:** KEEPS A LEAD ON FUNCTIONAL, COLLECTIVE AND WEALTH **ALBERT HEIJN:** VERY STRONG ON NEW IDEAS WHICH IS VERY IMPORTANT FOR NL

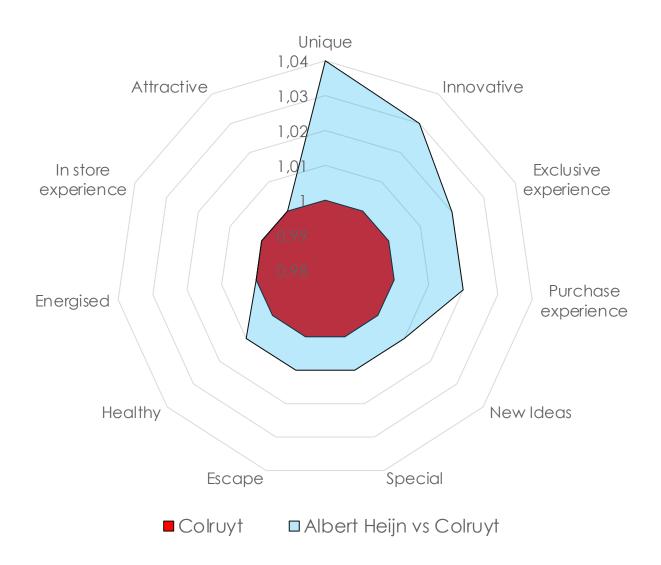


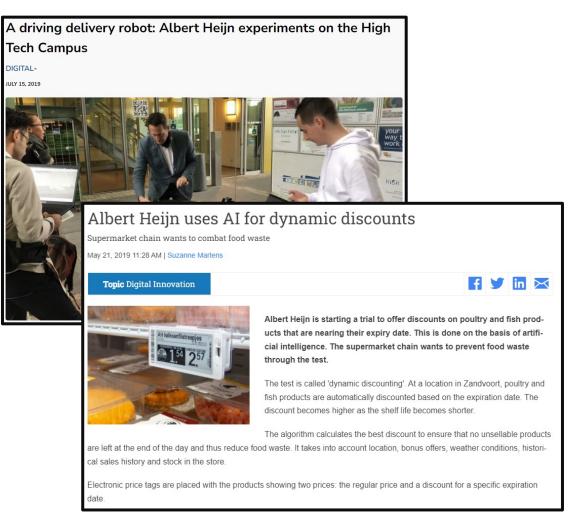


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#### MEANINGFUL BRANDS ™

## Albert Heijn is catching up with Colruyt in the north They already score better in Customer experience, Inspiration and Identity





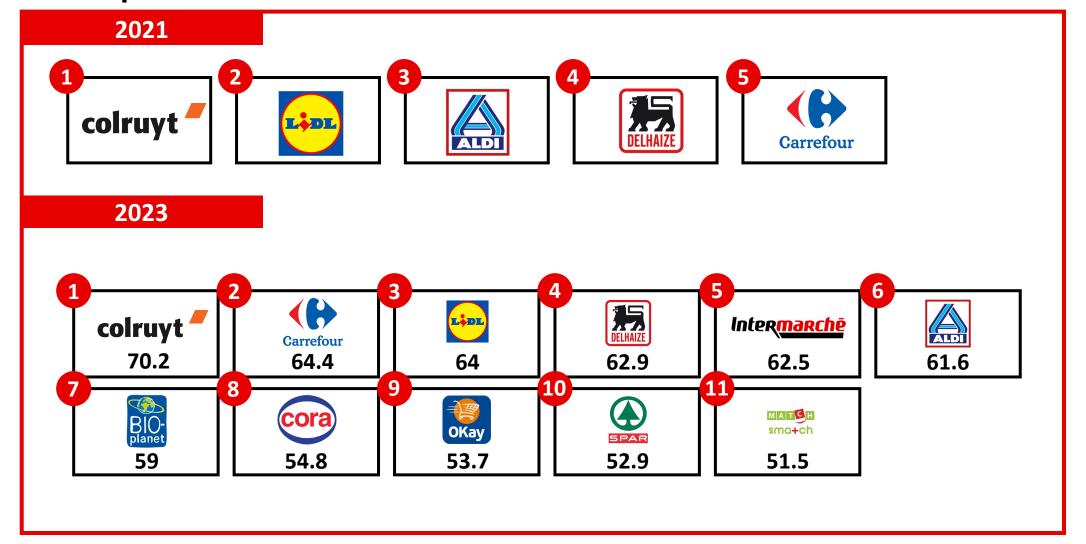








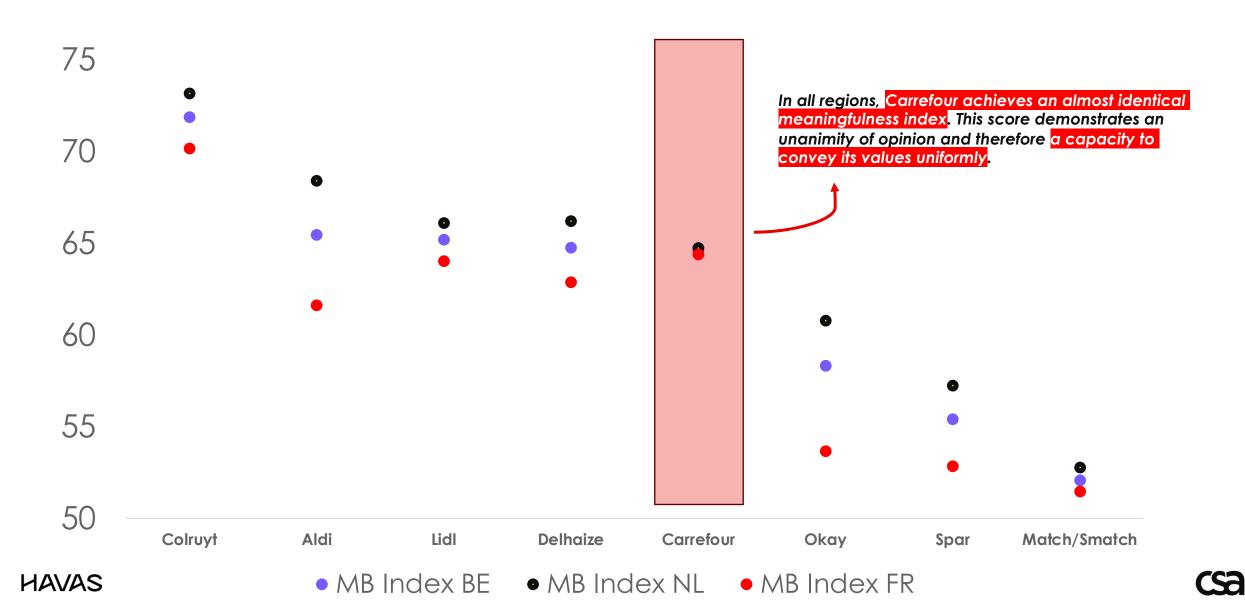
## Colruyt is stable in the South. Carrefour moves up the rankings at the expense of Aldi and Lidl.





## MBI is much better in the North than in the South. Carrefour is the only brand to have an MBI at the same level in both regions.





## THE PERSONAL PILLAR AND THE DIMENSIONS OF IDENTITY, EXPRESSION, INSPIRATION AND CONTROL ARE THE FOCUS

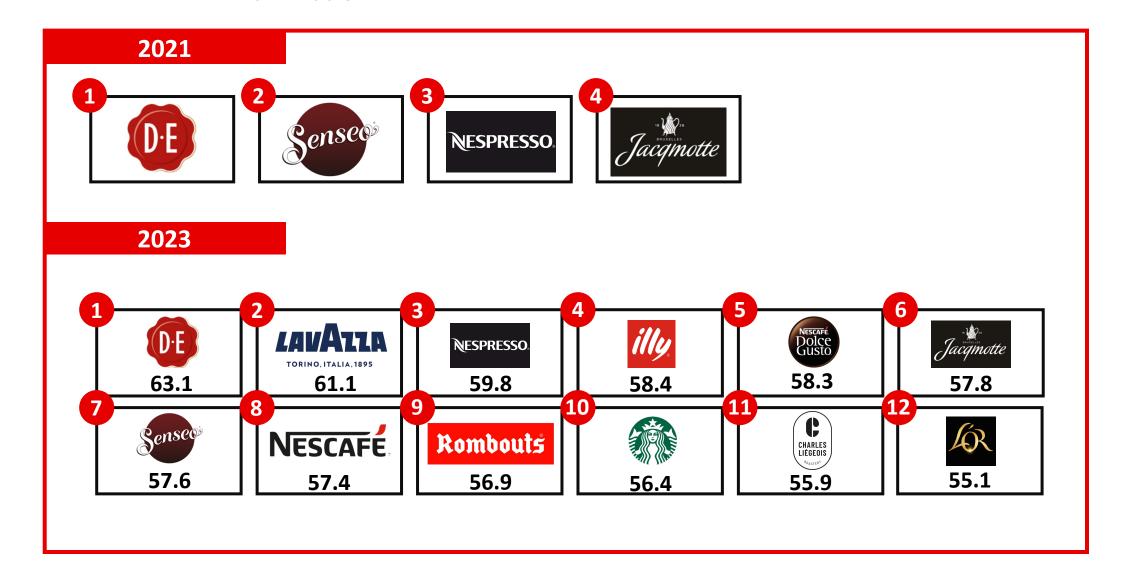




## DOUWE EGBERTS REMAINS THE CATEGORY LEADER, CLOSELY FOLLOWED BY LAVAZZA AND NESPRESSO.





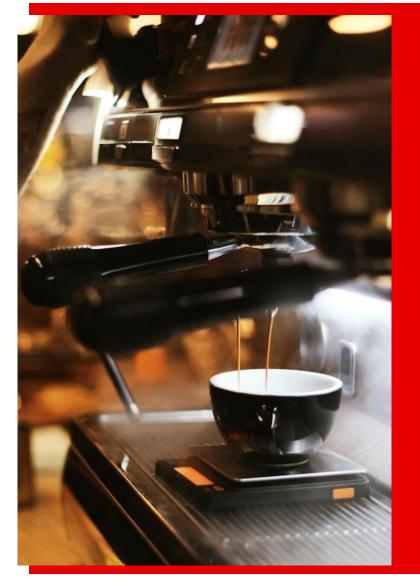




## MAJOR SHIFT TO COLLECTIVE IN IMPORTANCE SHOWING THAT CONSUMERS EXPECT A LOCAL ANCHOR, INNOVATION AND SUSTAINABLE PRODUCT



#### 2021 31% **26**% **COLLECTIVE FUNCTIONAL PERSONAL** BENEFITS BENEFITS 114 Quality Prods 129 Life Easier Food security 1111 Fair Prices 119 Savings Sust. Brands 110 In store experience 115 Healthy Jobs 107 Respect 114 Save Time Good employer 106 Safe & Responsible 114 Better Habits 118 Transparent 2023 (%)}\30 % **FUNCTIONAL PERSONAL** COLLECTIVE BENEFITS **BENEFITS BENEFITS** 124 Range 128 Simplify 126 Good employer 122 Good value 126 Wealth Benefits the Economy Innovative, sustainable and ethical Good reputation 122 New Ideas solutions 115 Purchase experience Peace of Mind Sust Products 109 Quality Prods 105 Control 104 Transparent

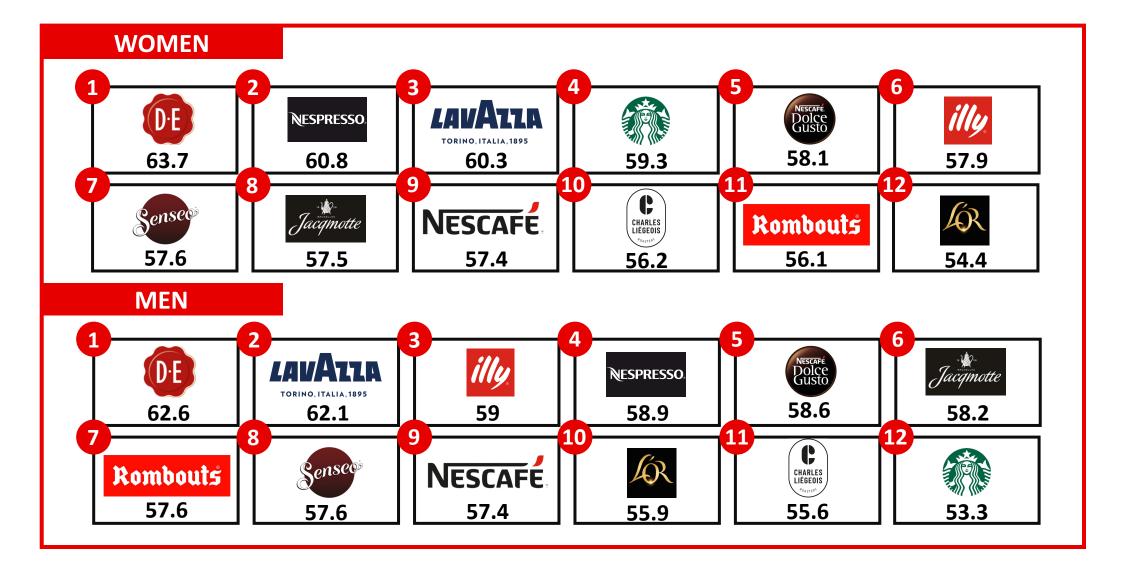






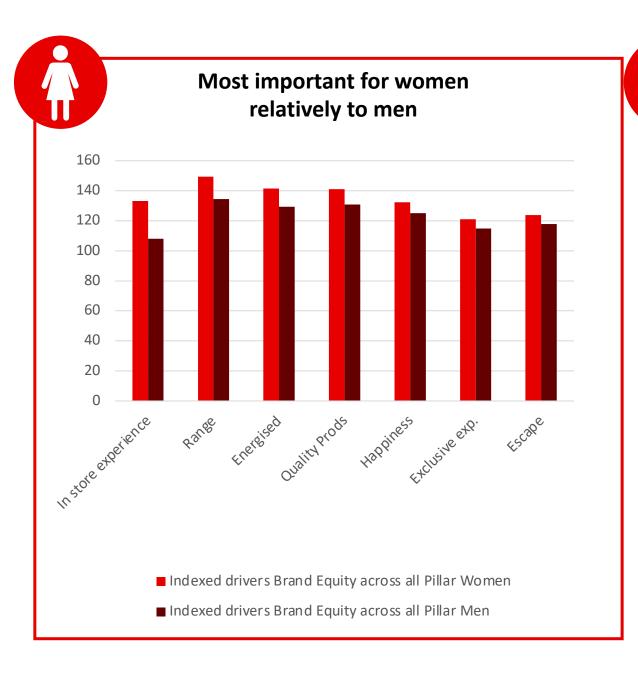
## DOUWE EGBERT DOMINATES BOTH GENRES NESPRESSO, STARBUCKS ON WOMEN LAVAZZA, ILLY, ROMBOUTS AND L'OR MORE PRONOUNCED AMONG MEN

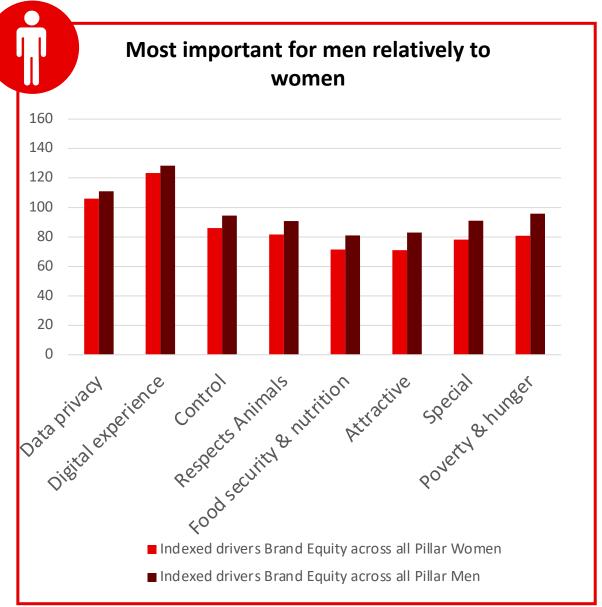






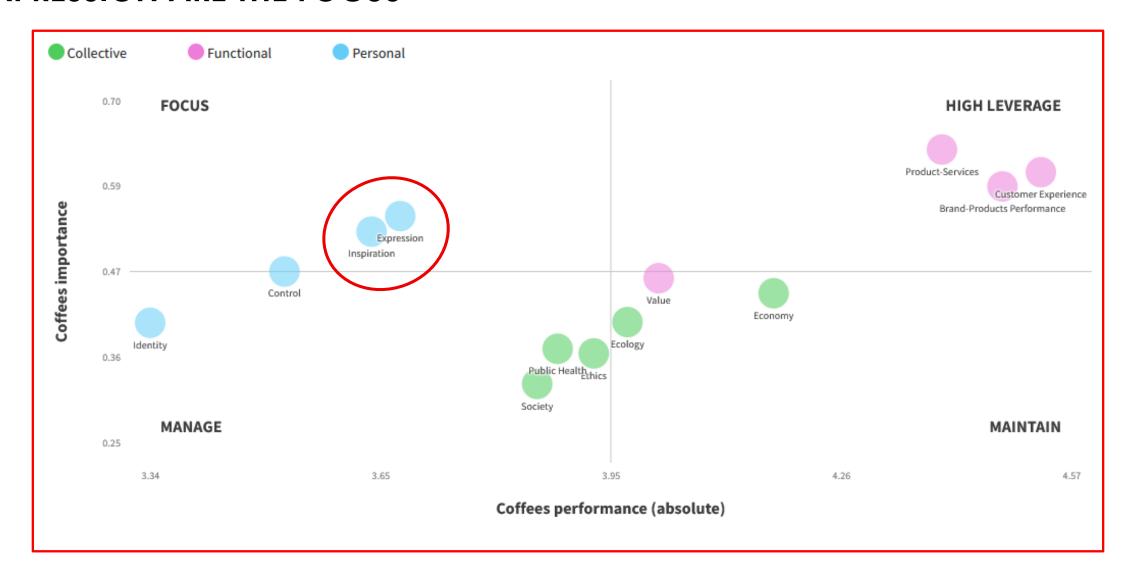
#### CONSUMER EXPECTATIONS BY GENDER DIFFER





## THE PERSONAL PILLAR AND THE DIMENSIONS OF IDENTITY, EXPRESSION ARE THE FOCUS



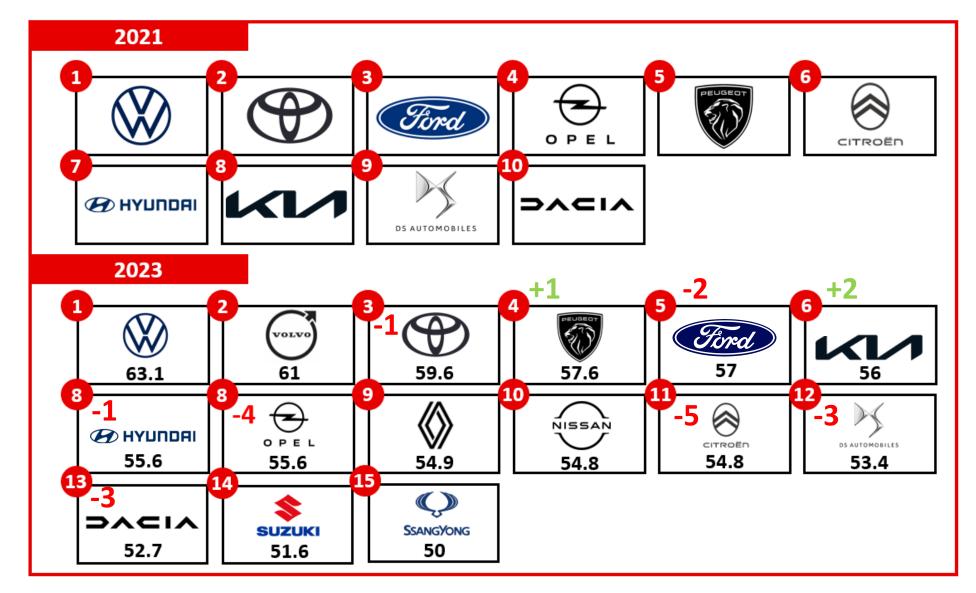






### RELATIVE STABLE RANKING WITH NEW ENTRANTS. VW STILL AT THE TOP. GOOD PROGRESSION OF KIA AND PEUGEOT. BIG DROP FOR OPEL

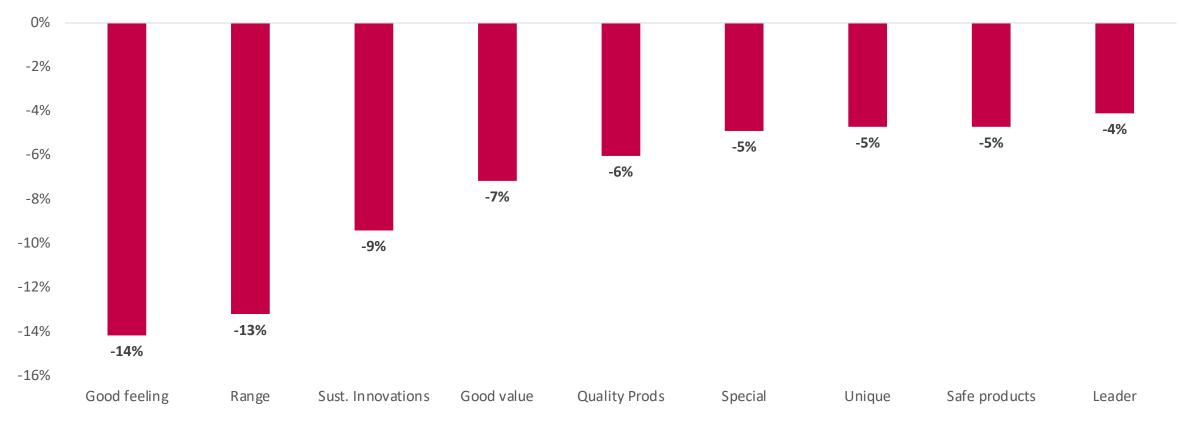






### Opel has missed the innovation, range, and personal benefits train.





■ Fall in performance 23 VS 21

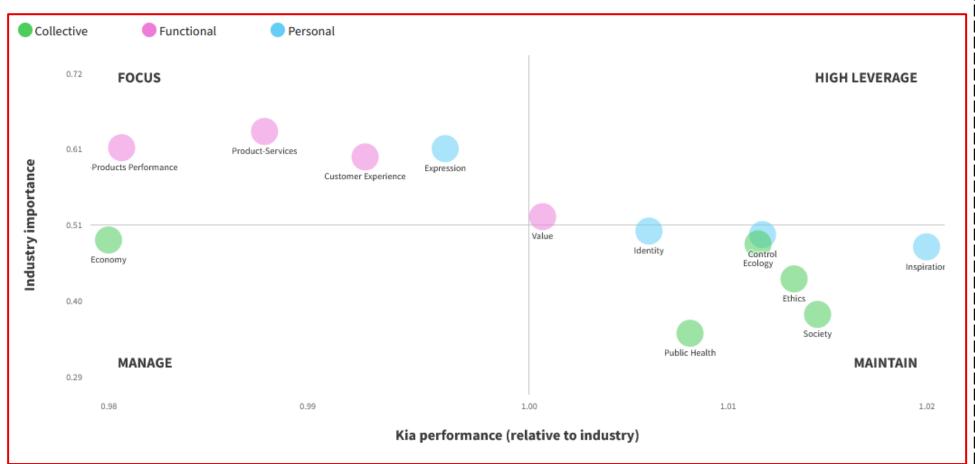


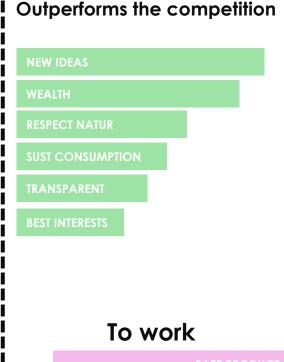






### Collective and personal benefits are already well advanced for KIA: work on perception of performance on the functional pillar

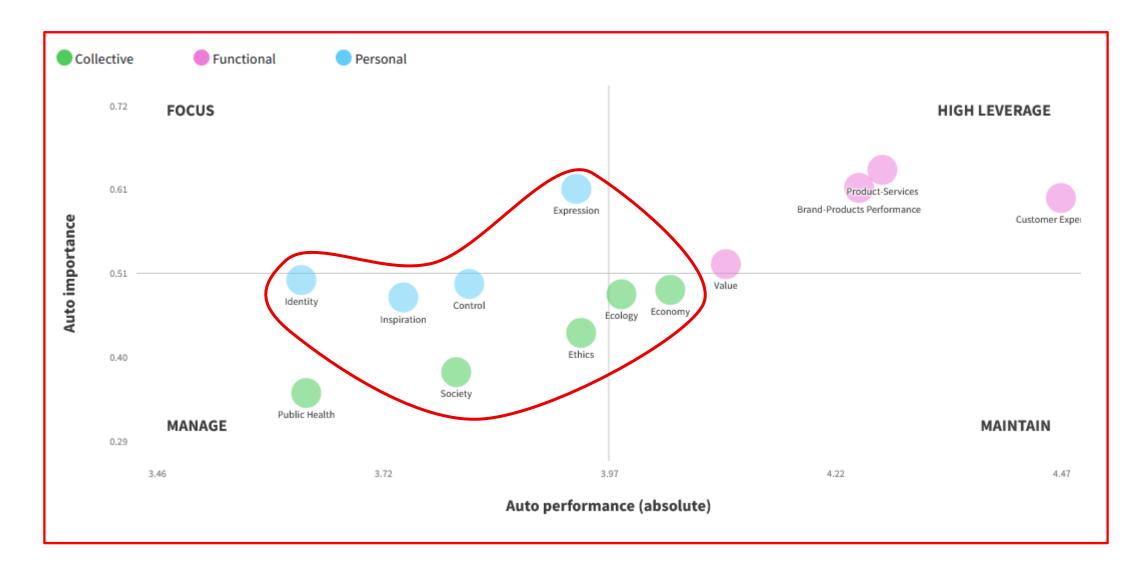






### THE PERSONAL PILLAR & COLLECTIVE ARE THE FOCUS FOR THE INDUSTRY









# FINANCE: BEING THE PARTER OF YOUR CUSTOMERS

### Importance for the finance sector:



Simplify, peace of mind and wealth set to be very important in 2023.

The collective pillar sees the rise of local attributes such as Good Employer and Benefit the Economy.



#### **BENEFITS**

118 Range

116 Purchase experience

113 Quality Prods

112 In store experience

110 Good reputation



#### **BENEFITS**

150 Simplify

132 Peace of Mind

129 Wealth

123 Control

108 Best interests



#### **BENEFITS**

127 Good employer

120 Benefits the Economy

119 Transparent

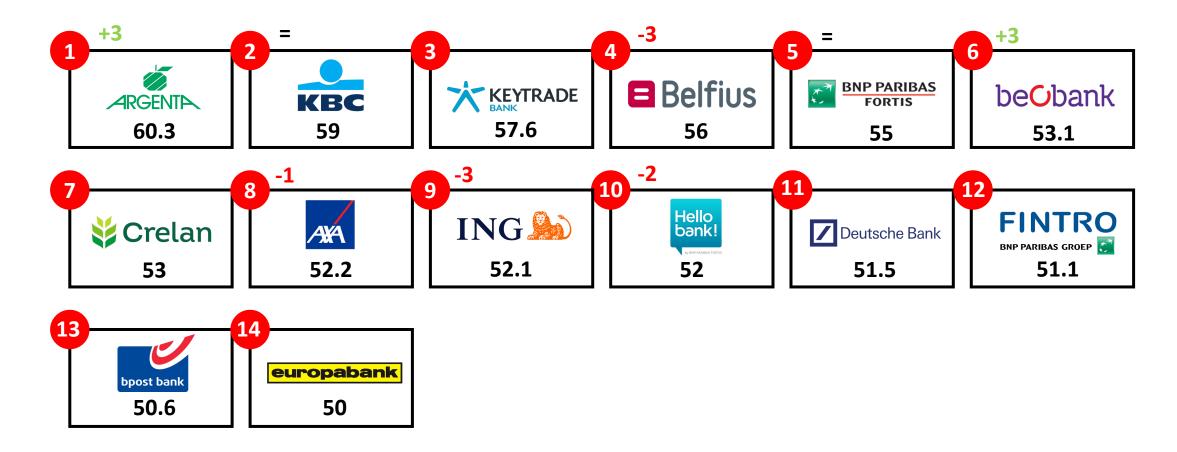
Innovative, sustainable and ethical solutions

101 Sust. Products





### ARGENTA THE BIG WINNER IN 2023 BELFIUS, ING PLUMMET

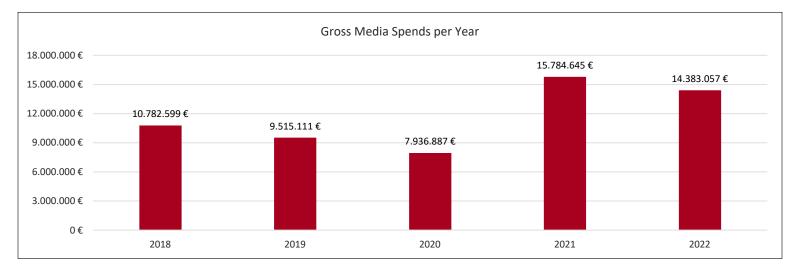


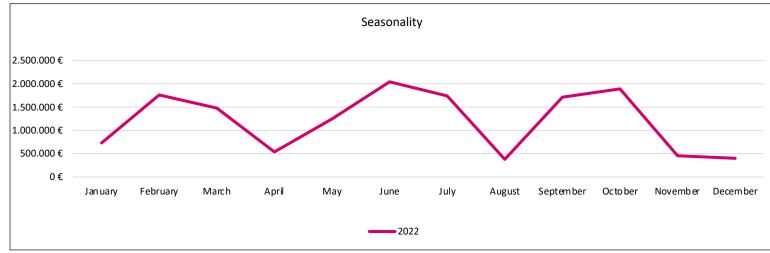


### **DESPITE MASSIVE INVESTMENT SINCE 2021...**











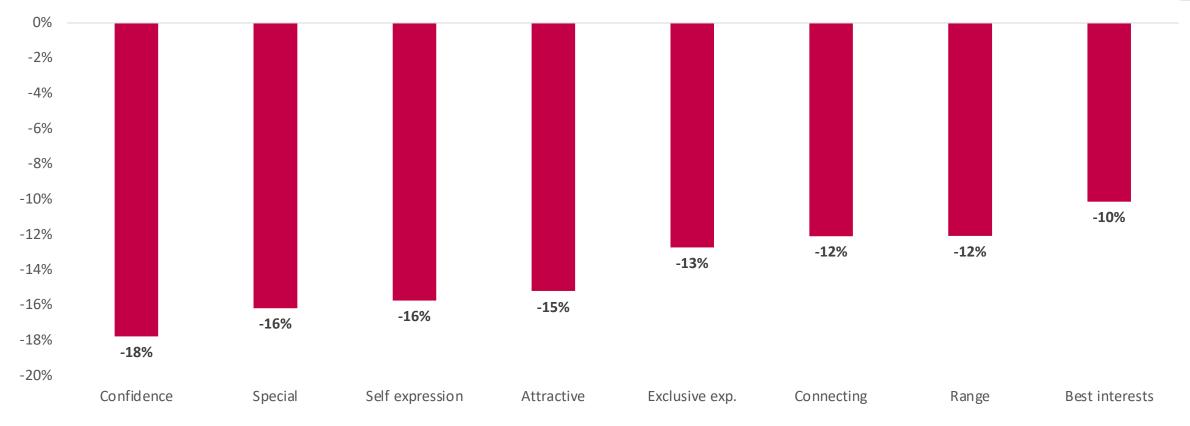






### BELFIUS DECLINES IN PERFORMANCE ON DIMENSIONS OF <u>EXPRESSION</u>, <u>IDENTITY</u>, <u>CUSTOMER EXPERIENCE</u>, <u>AND CONTROL</u>



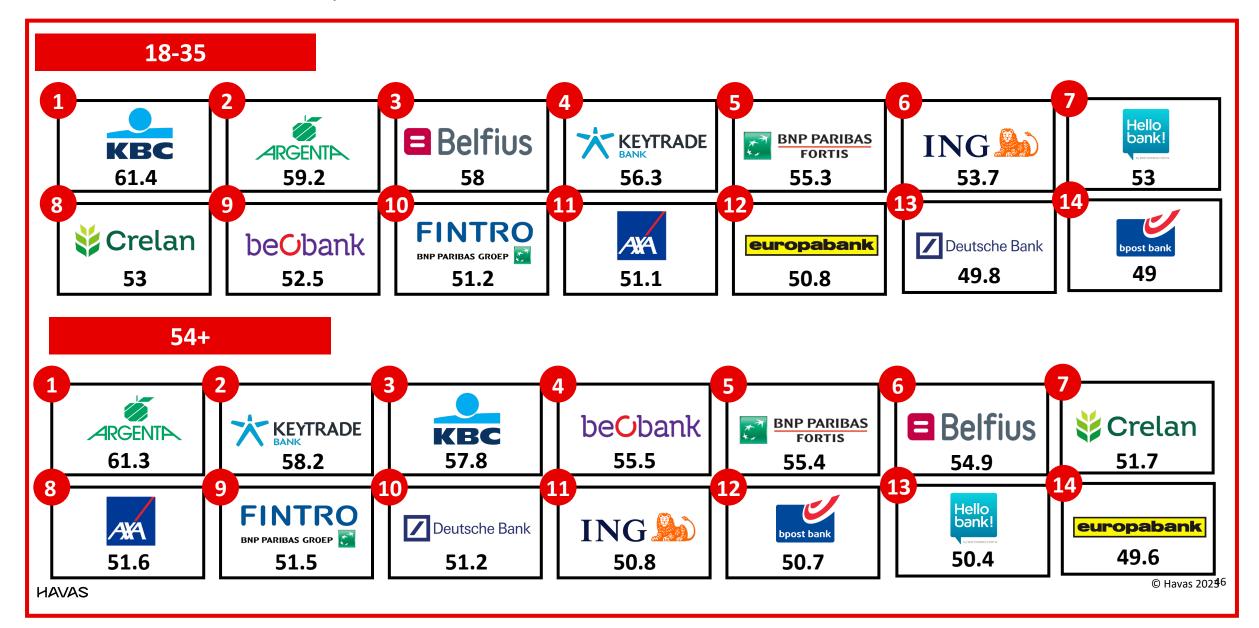


■ Fall in performance 23 VS 21





### KBC THE BIG WINNER AMONG YOUNG PEOPLE ARGENTA & KEYTRADE BANK, BEOBANK IN THE 54+ CATEGORY



### KBC TOP ATTRIBUTES ARE: DATA PRIVACY, EXCLUSIVE EXPERIENCE, REPUTATION





**DATA PRIVACY (12% OUTPERFORMS COMPETITION)** 

**EXCLUSIVE EXPERIENCE (11% OUTPERFORMS COMPETITION)** 

**GOOD REPUTATION (10% OUTPERFORMS COMPETITION)** 

**SIMPLIFY (10% OUTPERFORMS COMPETITION)** 

**DIGITAL EXPERIENCE (10% OUTPERFORMS COMPETITION)** 

**LEADER (9% OUTPERFORMS COMPETITION)** 

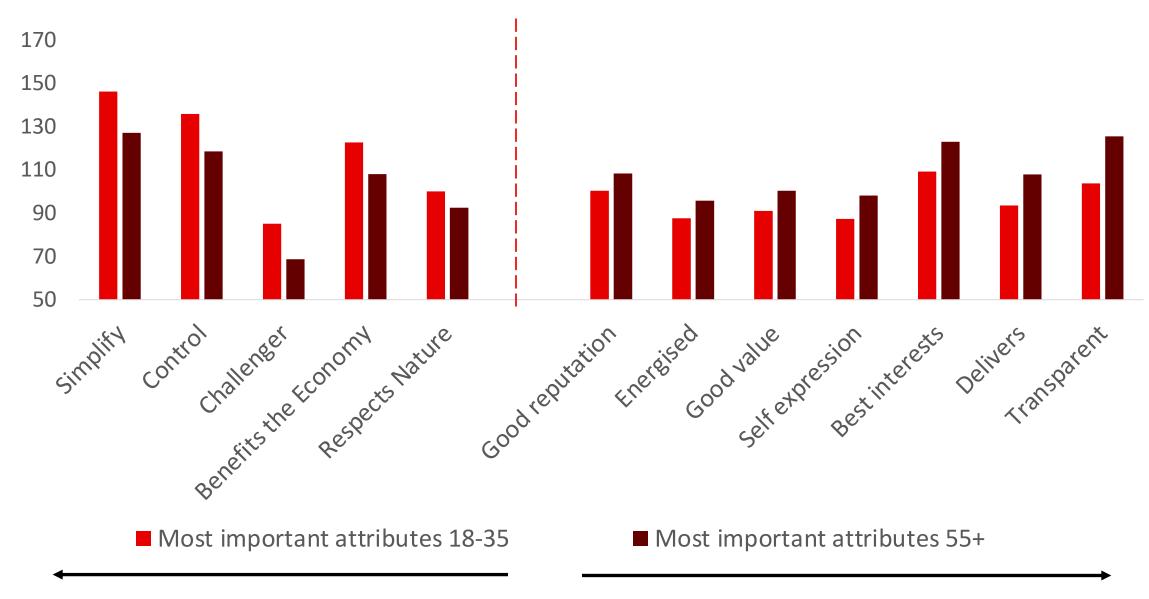
**INNOVATIVE (8% OUTPERFORMS COMPETITION)** 



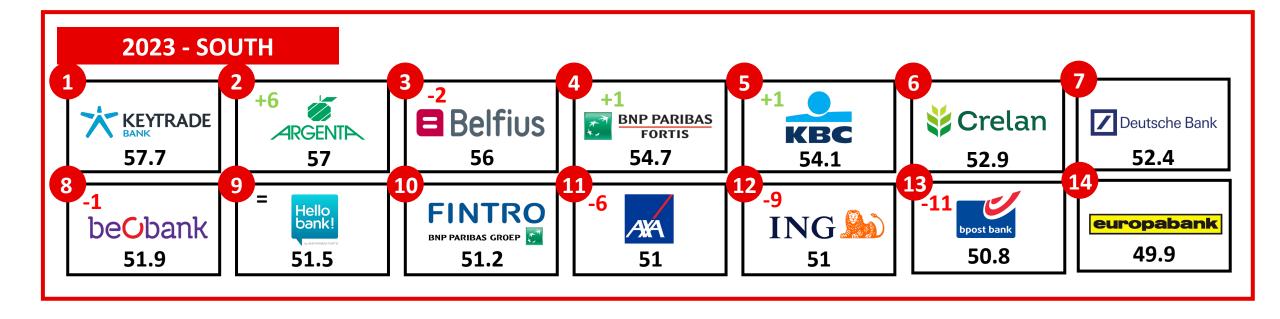




### **CONSUMER EXPECTATIONS BY AGE DIFFER**



### KEYTRADE BANK, ARGENTA & BNPFF IN PROGRESSION IN THE SOUTH



### BNPPF TOP ATTRIBUTES ARE: LEADER, SELF EXPRESSION AND DIGITAL EXPERIENCE





LEADER

**SELF EXPRESSION** 

**DIGITAL EXPERIENCE** 

**SIMPLIFY** 

**GOOD REPUTATION** 

**CULTURE AND EDUCATION** 

**RANGE** 

**DATA PRIVACY** 

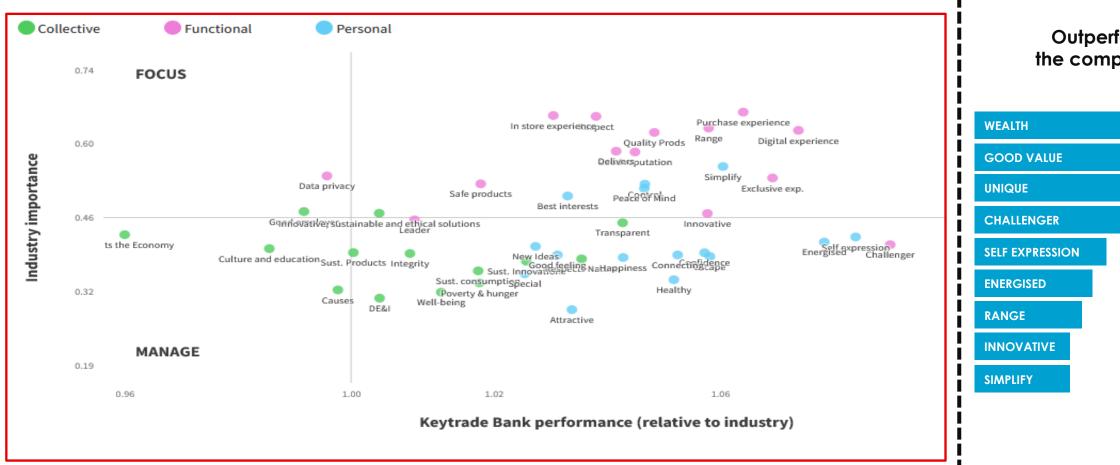


#### KEYTRADE PERFORMS WELL ON FUNCTIONAL AND PERSONAL AS DEMONSTRATED BY ITS TOP ATTRIBUTES. THE COLLECTIVE REMAINS A POINT OF WORK









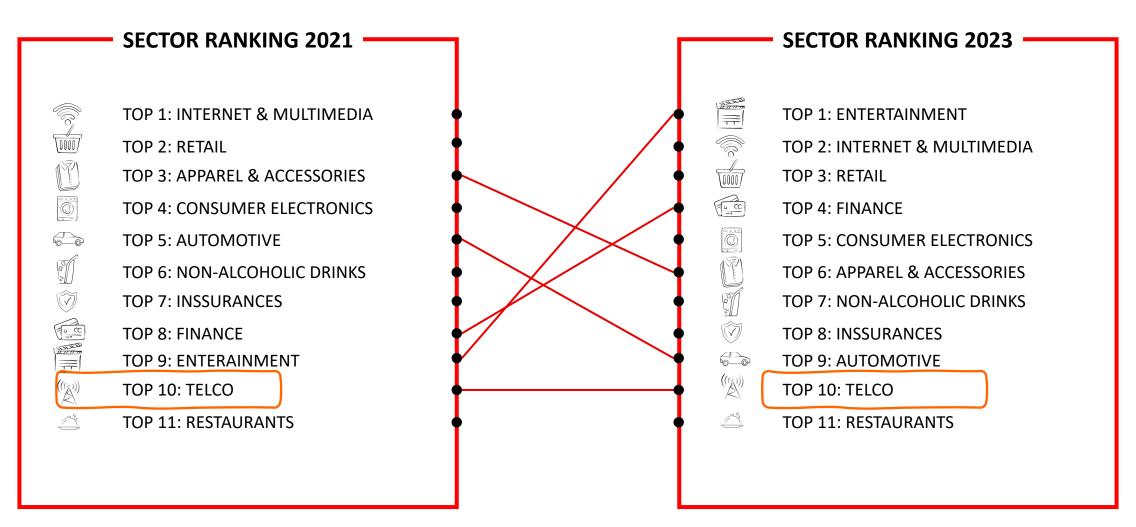






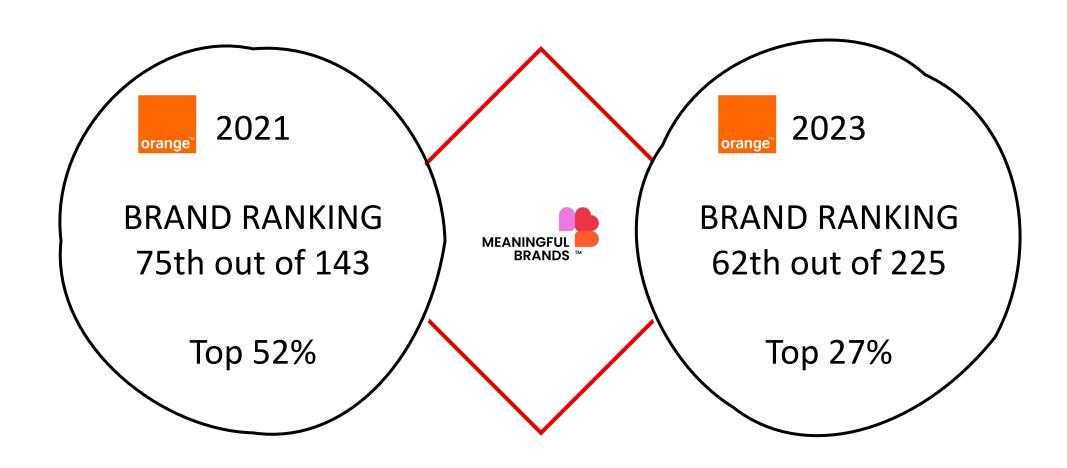
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### ECONOMIC AND HEALTH CRISES HAVE SHIFTED THE SECTOR'S RANKING...



### **MBI RANKING: ORANGE POSITION 2021 VS 2023**



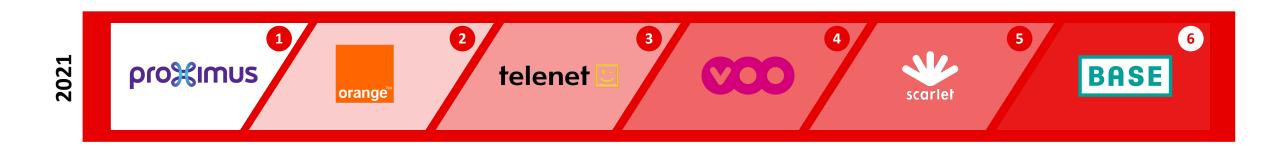


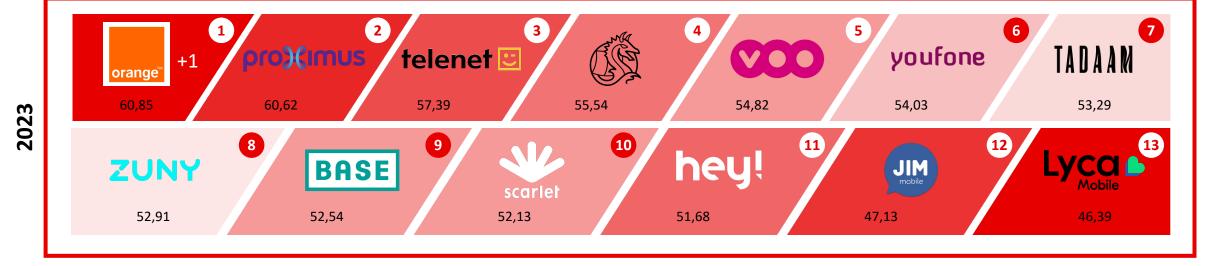
HAVAS

#### **MEANINGFUL BRANDS CATEGORY RANKING 2023**



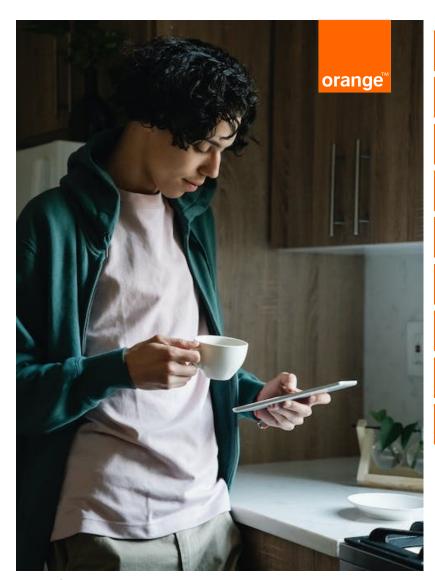
In BE, Orange takes first place for the first time!
Fairly stable ranking, except that Mobile Viking slips between Telenet and VOO
New and less mature players (Youfone, Tadaam, Zuny) slip ahead of Base and Scarlet at BE level





### HOW DID ORANGE GET AHEAD OF PROXIMUS? GOOD VALUE, WEALTH, DIGITAL EXPERIENCE





**GOOD VALUE (VAR vs PROXIMUS: 38%)** 

**RESPECT (VAR vs PROXIMUS: 31%)** 

**WEALTH (VAR vs PROXIMUS: 22%)** 

**DIGITAL EXPERIENCE (VAR vs PROXIMUS: 18%)** 

**PRICE CONSISTENCY (VAR vs PROXIMUS: 16%)** 

**DELIVERS (VAR vs PROXIMUS: 13%)** 

**DATA PRIVACY (VAR vs PROXIMUS: 10%)** 

**TRANSPARENT (VAR vs PROXIMUS: 9%)** 

**BEST INTERESTS (VAR vs PROXIMUS: 5%)** 





# MAJOR CHANGES IN THE PILLARS DEMONSTRATE A SHIFT IN THE WAY CONSUMERS THINK...

WELCOME TO THE ME-ECONOMY



# THE ME-ECONOMY IS THE RESULT OF THE LATEST MAJOR CRISES IN OUR SOCIETIES



We are living in an **economic crisis**, at a personal level is

### Ranked 1<sup>st</sup>

#### Other crises felt at a personal level:

2<sup>nd</sup> - Health crisis

3<sup>rd</sup> - Societal crisis

4th - Environmental crisis

5<sup>th</sup> - Political crisis



# PEOPLE ARE REPORTING FEELING THE EFFECTS OF CRISIS WITHIN THEIR DAY TO DAY LIVES

In the new MB™ 2023 survey

1 in 3

people report being <u>personally affected</u> by at least one crisis on an everyday level

1 in 2

of those <u>personally affected</u> by crisis, feel it impacting them in a multitude of ways





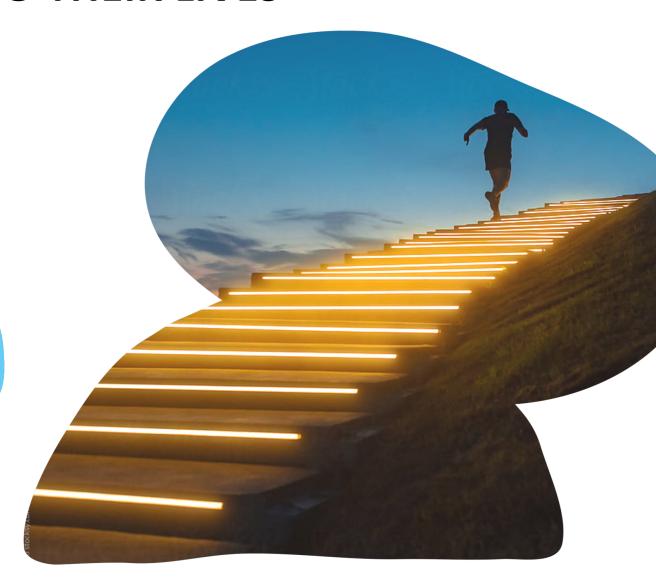
# CONSUMERS EXPECT BRANDS TO BRING OPTIMISM AND ENERGY INTO THEIR LIVES



## "Helps me feel energized and alive"

is the **#2** attribute across all pillars to contribute to our **Quality of Life**<sup>1</sup>

Today's Most Meaningful Brands™
perform +63% better on this
attribute than the average brand²



#### HAVAS Notes:

1. Dimensions/attributes sorted by Quality of Life index across all pillars.

2. Most Meaningful Brands' (top 10% performing brands on MB Index) average performance score compared against overall average performance score on Energized attribute.



## AND BEING THE MOST DEMANDING WHEN IT COMES TO BRANDS PRIORITIZING THEIR NEEDS FIRST



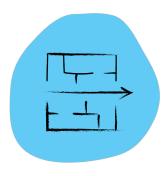
They are the most willing to ask brands to put their needs first:

**42**%

agree that companies/ brands should satisfy my individual needs first before taking a wider role in society



# IN A WORLD WHERE EVERYTHING IS BECOMING COMPLICATED, CONSUMERS NEED SIMPLICITY



# "Helps me simplify my life"

is the **#1** attribute across all pillars to contribute to our Quality of Life<sup>1</sup>

Today's Most Meaningful Brands™
perform +59% better on this
attribute than the average brand²



#### HAVAS

Note:

<sup>1.</sup> Dimensions/attributes sorted by Quality of Life index across all pillars.

<sup>2.</sup> Most Meaningful Brands (top 10% performing brands on MB Index) average performance score compared against overall average performance score on Simplify attribute.



### MAKE IT ALL SUPER-SEAMLESS FOR CONSUMERS

As purpose turns inward, sometimes a worthy cause is simply being great - removing barriers from consumer lives. Helping people save time or making life easy.

Or simply removing the "computer- says-no" attitude. This is coupled with a wider focus on consolidation of consumer habits, whether that's brands, retailers or banking.

Meaningful Brands perform

+42%

better on Customer Experience attributes like:



Simple and easy purchase/digital experiences



Exclusive experience and individualization



Respects my personal data



#### HAVAS



# IN THE 'ME-CONOMY' CONTROL BECOMES A CORE PERSONAL BRAND BENEFIT

Control is the #1 driver of quality of life



 $\mathbf{1}_{\mathsf{st}}$ 



#### **Control**

113 – Simplify

112 – Wealth

111 - Control

107 – Best Interests

 $\mathbf{2}_{\mathsf{nd}}$ 



#### **Expression**

111 – Peace of Mind

109 – Happiness

109 - Connecting

.09 – Good Feeling

108 - Confidence

 $\mathbf{3}_{\mathsf{rd}}$ 



#### Inspiration

113 – Energized

111 – Healthy

108 – New Ideas

108 – Escape

**4**<sub>th</sub>



### Identity

111 – Self Expression

104 – Special

100 – Attractive

HAVAS

Note: Dimensions/attributes sorted by Quality of Life index across all pillars

### Meaningful services

### Our consulting services support you in improving the meaningfulness of your brand

- Media strategy support
- Research & Analysis (ex. Meaningful Brands, Yougov)



- Marketing & Media consultancy
- Retail Media
- E-Commerce
- Digital Performance & Technology



- Data Architecture & Engineering
- Data Analysis & Visualization
- Data Modeling



### A dedicated team of consultants fully integrated within Havas Media





ALEC HEAD OF PERFORMANCE





SOUMEYA
DATA
SENIOR MANAGER



HUGO HEAD OF INSIGHTS





BASTIEN
DIGITAL
& SOCIAL PARTNER



THIBAULT
DATA ANALYST



GEOFFREY
SENIOR
INSIGHTS ADVISOR

CORENTIN
CONSULTING
& DATA OPERATIONS
DIRECTOR