

Grow.  
Change.  
Grow.

Interbrand  
Best  
Global  
Brands  
2017

# Grow. Change. Grow.

Growth has taken on a new form in the Age of You. As new dynamics emerge and change the shape of business by the minute, it demands new ways for organizations to harness and channel that change.

But the world's leading brands aren't waiting for change to happen—they're acting rather than reacting, growing rather than maintaining, and mastering Growth in a Changing World.

With so many directions to grow in, flexibility and adaptability are key. Businesses must be ready to change their trajectories along with people and markets: embracing emerging technologies, leaping engagement barriers, and rethinking their growth strategies—breaking things down to start them up again. They must be ready to grow, change, and grow all over again.

To meet these challenges, organizations need to make brands the center of gravity—the closer you get, the faster you grow.

Brands are what connects businesses to people inside and out, creating real proximity by understanding what people want and what they believe in. Brands are what personalize technology so that it becomes a means for authentic engagement and unforgettable experiences. Brands are the constancy that accelerates business growth—moving at the speed of life, reflecting how people want to grow, growing along with them, and standing out in a shifting landscape.

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**Brands are  
the constancy  
that accelerate  
business growth.**

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# Growth in a changing world

**Jez Frampton**  
Global CEO, Interbrand

Growth is fundamental to life. It is an inherent part of being human. So is change.

Over the last two decades, our lives have been transformed in remarkable new ways. These shifts in behavior, expectations, and experiences provide incredible opportunities for business growth, but keeping up with them poses new challenges. One of the most critical ways to turn change into growth is by building and constantly developing a strong brand.

Brands are how we form opinions and find meaning in a business. They embody purpose and values, help human beings understand a business on a deeper level, and ensure businesses act in line with people's expectations. Consumers use this understanding to make better choices, demonstrate loyalty, and determine value. Brands are a human construct, and are at the heart of any successful business.

This is as true internally as it is externally. Brands start with humans on the inside and are ultimately delivered to humans on the outside, using technology as a primary means of interaction and a powerful platform for engagement. At a time when speed to market, customer centricity, and cultural alignment are more important than ever, brands are the key to change, and to growth.

## Purpose that moves people

If brands start and end with people, it's important to acknowledge a significant generational shift in the way people interact with, and what they demand from, brands. Both as employees and customers, younger generations have very different views about the brands they choose. They expect a brand's purpose and values to align with them, and their desires for better communities and a better world.

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**60% of millennials seek employers with a clear purpose.<sup>1</sup>**

**66% of consumers claim to be willing to pay more for products from more socially responsible companies.<sup>2</sup>**

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It's important to be clear about the nature of purpose. It's the organization's reason for existing: its most fundamental beliefs and highest-order aims. It isn't just about repackaging a Corporate Social Responsibility (CSR) strategy. Brands with strong sense of purpose draw people in, aligning people inside the organization while driving momentum outside of it.

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## **84% of executives believe a shared purpose contributes to successful change and transformation.<sup>3</sup>**

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Breaking silos within the organization by freeing up communication across the business helps organizations operate at the speed of life. A strong, clear brand purpose helps a business change successfully by ensuring everyone moves in the same direction at the same speed.

### **Technology that accelerates growth**

The acceleration of technology impacts every part of a business. From automated

production to self-driving delivery vehicles, from programmatic media buying to the rise of AI in shaping customer interactions. And new models are emerging that help companies understand how and where to invest to ensure brand-driven business profits.

More importantly, technology is changing people's behaviors and expectations faster than we can create and innovate. So how do brands play into this evolving dynamic as the gap between desire and fulfillment diminishes? This is where technology plays a pivotal role. It can be used to create a detailed image of customers, bringing brands closer to people every day. When technology is fully integrated with the brand, it can shrink the desire-fulfillment gap, fast.

The challenge is creating a truly branded experience. While technology offers proximity, engagement is not a given. Merely implementing the latest technology without the brand as a filter misses the opportunity to create a powerful bond between people and business.

And while innovation is crucial, it doesn't necessarily put a business ahead in the market—it may simply keep it on par. Any company, from digital native to established organization, that puts technology first and brand second isn't likely to sustain growth. While people may enjoy the experience, they aren't necessarily connecting with the company on the deeper level that contributes to building long-term loyalty. Brands humanize technology, making it meaningful by yielding experiences that create lasting value.

### **Brands are the synergy between people, technology, and business**

Since brands are the mechanism by which people relate to businesses, they play a powerful role in creating deep and valuable connections to the businesses via technology.

Placing the brand at the center of the business agenda smooths the tension between technology and people, giving rise to a new type of synergy that's essential to all sides of the business: on the inside, brands align culture and capabilities for growth, directing innovation and resource allocation; on the outside, brands provide a platform to deliver a unique and valued experience that reflects not just what people want, but what they believe in.

For Best Global Brands 2015, we highlighted the coming wave of personalized technology marked by The Age of You. In this age, we operate for the individual, using data and technology to offer products and services, communication, environments—in fact, the entire customer experience—tailored to individual needs. The next great challenge for brands is the ability to automate these complex moving parts, without losing the personality and humanity that's characteristic of the greatest brands.

## In conclusion

The only constant is change, and we are living in one of the most exciting periods of change since the Industrial Revolution. The changes we are observing are societal, attitudinal, technological, economic, industrial, and impact every aspect of commerce and life. Within this ever-shifting context, growth becomes ever more challenging. Businesses need a medium that clearly communicates purpose and energizes cultures, a platform upon which to create engaging and unique experiences, a means to stay relevant, meaningful, and valued. In this changing world, businesses need brands more than ever.

<sup>1</sup> Deloitte 2015 - Unlocking Millennial Talent

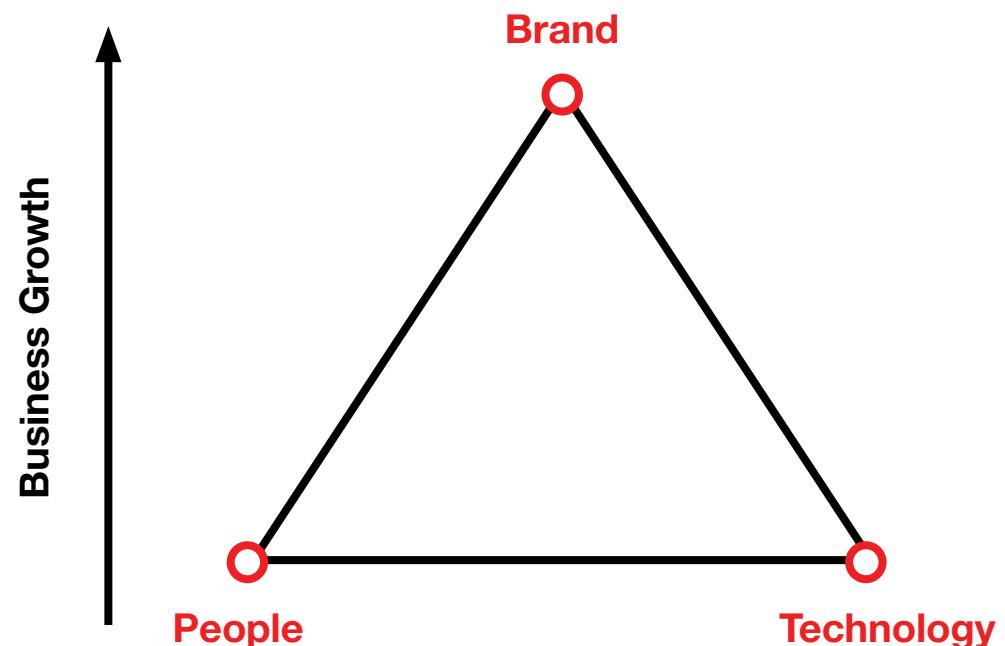
<sup>2</sup> Nielsen 2015 - The Sustainability Imperative

<sup>3</sup> Harvard Business Review 2015 - The Business Case for Purpose

## So, for future Growth in a Changing World:

- 1** Brands: are a business strategy brought to life, and are the primary means for differentiation and growth.
- 2** People: brands are about people and how they connect to the purpose of a business.
- 3** Technology: helps accelerate growth and customer proximity, but only through brands can it deliver meaningful engagement.

## The closer to brands, the greater the growth





# **People: From culture to customer**

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**Brands start and end with people. So it's important to acknowledge a significant shift in the way people interact with brands—they expect to connect to an authentic purpose and values. Brands with strong sense of purpose draw people in—they align people inside the organization, while driving momentum outside of it.**

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# Growth from the inside out

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**Brands start on the inside with humans, and are ultimately delivered on the outside to humans.**

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People within an organization are the fuel for growth—they’re the innovators and doers, the passion and energy. To harness this, however, it’s vital to acknowledge that people change too, which means organizations must evolve their thinking along with them. Being attuned and attentive to people is how an organization successfully aligns with, attracts, and retains both talent and customers.

Major cultural shifts impact the way people think on a macro scale—especially

younger generations—and these attitudes trickle into organizations. Understanding the forces behind their motivations and desires is key to shifting the thinking of an organization.

**The world is changing, and we need to adapt**

world	work	employees	culture
macrotrends	era of purpose and values (why, not what)	lack of trust in formal hierarchy	implications
urbanization changing demographics climate change	learning vs.v doing millennial workforce hyper-connectivity/technology quality of life/wellness	desire for more flexibility, less process personalized development: coach and manager freelance vs. full time mobility/career development	hard to change & adapt due to over-engineered processes quality, pride, and innovation at risk

## From profit to purpose

An evolution in thinking has given rise to a mass movement towards greater purpose and more deeply held values. We’re focused on a better future, constant learning, and a holistic quality

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**74% were satisfied with their jobs if they felt their work was meaningful to themselves, the company, and the community.<sup>1</sup>**

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of life. On a personal level, people are looking for places to put their trust, to affirm their values, and to create change within their own lives and in the world. This is where companies must step up and prove that they, like their customers and employees, stand for something.

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**Brands with a purpose set on improving our quality of life outperform the stock market by 120%.<sup>2</sup>**

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People will begin to shift away from companies that are solely focused on the bottom line. They will turn their attention towards companies that align with their values and assert a purpose that's better than profit, which in turn impacts performance.

### Cultivating culture

Culture is living and breathing; it takes active cultivation. It's not solely an HR initiative nor a marketing ploy. It's a way of doing and being. Culture is the responsibility of everyone inside the organization, but leaders have a critical role in initiating change and embodying cultural values. To do that, they must initiate key culture changes that reflect shifts in culture at large.

Customer service, innovation, and creativity are intangible measures that a strong company culture fosters and supports. Whether on the sales floor or behind the scenes, employee engagement is key to generating high-

### The five key culture shifts

employee	partners
job	experience
engagement	partners
leaders	coaches
values	behaviors

value customer experiences. Business growth relies on satisfied customers and great experiences are driven by satisfied employees.

### The working future

Today, more employees are motivated by passion than career ambition. This demands that leadership focus on making the work environment diverse, compelling, and rewarding.

### Flexibility

People are thinking outside of the "three boxes of life" (education, job, retirement), which means a more flexible approach to work. It's what has given rise to the gig economy. In order to attract and retain employees, companies are empowering individuals to live, learn, and work when and how they want.

### Diversity

Diversity is about inclusion of people from all racial, cultural, learning, and economic backgrounds, elevating skills that were previously ignored to infuse an organization with unique ideas and new ways of working. This challenges the way companies recruit, mentor, and train, and will render one-size-fits-all success metrics obsolete.

### **Self-development**

People want to be learning and growing throughout their lives. They're focused on healthier, holistic lifestyles and self-realization. Work is a huge part of that personal development. Managers must become coaches and mentors and give employees the agency to try and fail, learn and grow, create and innovate.

People fuel the growth of your business. Whether it's giving employees the creative freedom to innovate or listening to customers to create more impactful experiences, "How will this affect real people?" should be the first and last question an organization asks.

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**Only 14% of  
customers defect  
because of product  
quality. 68% of  
defections occur  
because of staff  
indifference.<sup>3</sup>**

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<sup>1</sup> LinkedIn Purpose at Work - 2016 Global Report

<sup>2</sup> Havas Media Group 2015 - Havas' Meaningful Brands study

<sup>3</sup> White House Office of Consumer Affairs - TARP

# Calculating customer proximity

In the *Age of You*<sup>1</sup>, customer centricity is still king. It's not enough to talk about customers and their needs. It's talking to and with them that's the key. Putting customers at the heart of the business requires going deeper and getting closer. To be customer centric is to be customer proximate.

Analytics can get companies closer to customers, but in a changing world, the way people interact with brands is far more fragmented—sources of information are scattered and proliferating. Analysts have to be more creative in the ways they collect information, and how that information is aggregated into actionable insights. Data gathering—when done right—can provide real, human insights that build authenticity, relevance, and engagement—all characteristics of a strong brand that drives growth.

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**74% of companies that over-perform on revenue growth create customer experiences based on data-driven insights.<sup>2</sup>**

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## The empathy in analytics

While marketers tend to focus on measurement and act on the functional, the emotional component is crucial, both in gathering insights and putting them to work for the business. Exercising empathy builds understanding on one side, and trust on the other.

People don't want to be data points. They want to be listened and catered to as human beings. Building empathy into analysis requires active listening. Data gathering should be approached as a collaborative activity, with the goal of creating better and richer experiences.

Authentic interactions will build trust in the brand. People can tell when they're being listened to and when they're not. Empathy requires thinking about how the interaction will ultimately benefit the individuals you're talking to. It's this deeper understanding that drives relevance to real people—not just "customer segments"—which comes through in the brand's experiences.

## From experience to mutual engagement

Understanding the experience from a customer perspective, rather than from the business or brand perspective, is

the first step to building engagement. Experiences that are 100% customer-led return to the brand in the form of engagement and loyalty. They foster deeper relationships.

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## 70% of buying experiences are based on how customers feel they are being treated.<sup>3</sup>

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Relationships take work. Growing brands are looking to strengthen and deepen the relationships they've formed with customers. They're identifying methods for measuring the performance of their engagement strategies, and developing ways of using measurement to continue optimizing their experiences.

This constant vetting of the brand's experiences is necessary to stay relevant and in line with expectations. A proactive approach to engagement requires that organizations keep checking in with customers and measure their expectations against the brand and business strategy.

### Mixing methodologies for more human insights

With fragmenting touchpoints, media interactions, and various social signals, brands have to be more creative in the way they gather information. This means using multiple and alternative research tools and techniques, because people are complex—no single-track approach will capture the nuances brands need. Crowdsourcing, social media watching, and Market Research Online Communities (MROCS) are rising research methods that tap into people's natural and evolving behaviors. It's about being everywhere the customer is. Insights come from many channels and tell a more holistic story when combined.

### Proximity on purpose

Big data has a part to play in telling the story about how people interact with the brand—but it can't be the only part. Efforts to reach the customer should be authentic and reaffirm the brand's purpose and values. These should extend from the ways they gather information, to the experiences they create. When brands are engaging and empathetic in the way they approach people, it impacts how they ultimately incorporate and give voice to the customer, and forges a relationship that will withstand change.

<sup>1</sup> <http://interbrand.com/views/age-of-you-keynote/>

<sup>2</sup> The Advertising Research Foundation 2015 - Insights2020

<sup>3</sup> McKinsey 2006 - The moment of truth in customer service

# Shared values, shared purpose

The world is changing, and so must brands. But if there's no anchor at the heart of a brand, change can't be sustained and can even be chaotic. At a time when a clear vision and an authentic purpose are critical to every organization, the values underpinning that purpose are what help hold it steady, and become the bones that prevent its collapse.

Purpose is an organization's reason for existing: its most fundamental beliefs

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**84% of executives believe an organization with a shared purpose will be more successful in transformation.<sup>1</sup>**

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and highest-order aims. A strong sense of purpose draws people into an organization and aligns them inside of it while driving momentum outside of it. Purpose is built on values, and values are the foundation of everything the organization does.

- 1** Values are the DNA of an organization
- 2** Values characterize the corporate ethos
- 3** Values govern how you behave and build affinity
- 4** Values are enduring and shape the essence of a brand

Values connect people to people, and customers to brands. When people and brands align on a deeper level it creates a synergy that allows them to change and grow together.

## Change on purpose

Change for the sake of change can weaken a brand. True agility means flexing with purpose. Such agility can only be achieved by defining and codifying that which the organization stands for—it cannot be a boardroom exercise that pumps out a generic statement that may be interpreted as superficial and unfounded.

Authenticity is the litmus test for credibility and relevance. It resides in a company's heritage regardless of age. The challenge is to find that source. Some of the perennial Best Global Brands have evolved over decades based on core values that are embedded in their brands and businesses. It's not about getting stuck in the past. Messaging can evolve and business strategy can change. Far from abandoning values, exercising agility means reaffirming them inside and out.

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**83% of companies that overperform on revenue growth link everything they do to brand purpose, as opposed to only 31% of under performers.<sup>2</sup>**

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An organization's culture offers a compelling view of the resiliency of the company's values. Employees are the first line of defense and the front lines of conviction—engagement scores and performance metrics will measure the resiliency of values and efficacy of purpose. In the market, these ideals must be constantly understood, expressed, and measured through the brand. There has to be a constant checking-in between the organization and the customer for that connection to remain relevant.

## Sustaining relationships

The relationships that exist between customers and brands have evolved to become more intimate and transparent. People have greater access to brands,

and more power to measure the quality of their experiences with them. This is an equalizing force, putting accountability in the hands of customers, and customers-to-be. People understand when brands deviate from their values, and have the power to withhold loyalty—and dollars—when they do.

A brand's experiences should be driven by a set of behaviors that are part of the organization. Authenticity is about the promises that you make and the experiences that you create. Consistently delivering on that promise sustains the bonds between customers and brands.

## From values to growth

Brands that stand as the embodiment of purpose and values are a magnetic force, keeping existing customers close and drawing new ones into the fold. Like things attract. Shared values bring people and brands together, both internally and externally.

When values manifest in a clearly communicated purpose, it becomes the engine driving the organization. Purpose is the connection to the past, the reason for being, and the roadmap to the future. It keeps people connected to the human side of the business, willing to trust its interests, and contribute to its growth.

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**82% of employees and executives have more confidence in companies with a strong sense of purpose.<sup>3</sup>**

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<sup>1</sup> Harvard Business Review & EY 2015 - The business case for purpose

<sup>2</sup> The Advertising Research Foundation 2015 - Insights2020

<sup>3</sup> Deloitte 2014 - Core Beliefs & Culture Survey



# **Technology: From proximity to connection**

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**The acceleration of technology is impacting every part of business growth. It's changing people's behaviors and expectations faster than most businesses can create and innovate. But technology's pivotal role in this evolving dynamic is to create a detailed image of customers, bringing brands closer to people.**

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# Building brands at lightning speed

Brands don't move at a single speed. New, technology-centric brands like Interbrand's Breakthrough Brands—unencumbered by legacy processes and free to reinvent how they do things in the Age of You—can build up their businesses and brands at head-turning rates. Chinese rideshare brand Didi Chuxing, Indian online marketplace Flipkart, and US e-commerce and payments provider Square have reached valuations of 50 \$b USD, 11 \$b USD, and 6 \$b USD respectively. What do they have in common? They're all forward-thinking, digital-first companies that have worked just as hard to establish their brands as they have their new technologies.

The key insight is that being an agile innovator is not enough. There are plenty of companies creating incredible technology and breaking down paradigms that go nowhere.

This is where companies with established brands have a massive advantage. They have already done the

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**Without a strong brand as an interface between your incredibly fast-moving company and your actual customers, it's difficult to make real impact in the market.**

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hardest work: their brands are strong, recognized, even beloved. It's the internal structure and capabilities that need to be boosted.

There are a few ways to build the technical capability of a company to expand its brand. Integrated systems

and collaborative tools that provide seamless communication should be a given, but are often overlooked. Beyond that: acquiring, investing in, or partnering with younger, faster brands is effective. If you can't beat them, join them.

Microsoft's acquisition of LinkedIn, Walmart's acquisition of Bonobos, and the partnership between Target and Casper are all a testament to the growing popularity of this strategy. Now, as once-Breakthroughs reach the Best Global Brand level, they are even acquiring longer-established brands (and their clout)—Amazon's recent acquisition of Whole Foods being a sign of what's to come.

Established brands are also in a good position to use and create new technology. While startups can drive flashpoint innovations with sustained focus, established brands have the budget to fund and foster these efforts at a larger scale. They are able to truly experiment and put ideas into

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## Worldwide spending on IoT will grow 16.7% in 2017, reaching more than \$800 billion.<sup>1</sup>

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practice with the resources that smaller companies just don't have, to build their brands faster.

Samsung's continued investment in VR and IoT, on display at the Samsung 837 experience space, is an example of a Best Global Brand that never stops in its efforts to put the latest technologies in the hands of real people. Auto brands like Nissan and Toyota continue to push boundaries for self-driving and electric cars, with up-and-comer Tesla setting the pace. Breakthrough Brand Face++ creates stunning facial recognition technology, but it took Lenovo to give them their most well known use case—allowing users to login to Lenovo products with their smile alone. Best Global Brands are enablers of technology, and when they combine new capabilities and solutions with a strong brand platform, it only amplifies their business growth.

Technology and brand are now indelibly intertwined. We form opinions on many brands through the user experience of their apps alone. Established brands that get the most attention do so for technological leaps and innovations, not just for the latest ad campaign. People want to try new things that work well, and when those things impart a stronger connection or a positive feeling, they are associated with the brand that supplied it in the first place. That needs to be the goal of any brand looking to grow, and technology can take them there faster than ever.

Building brands at lightning speed is not just reserved for startups. No matter how established or beloved a Best Global Brand is, continued brand-building is a must for business growth.

<sup>1</sup> IDC's Worldwide Semiannual Internet of Things Spending Guide 2017

# Don't let technology get in the way

Brands and people are occupying more spaces together, both digital and physical. Technology can create more opportunities for brands to form deeper relationships with customers, and it's becoming more than just a tool—technology can embody your brand. However, if it's not fully embraced and the experience is disruptive rather than immersive, it will only cause alienation in place of connection.

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**The adoption rate of home voice assistants grew to 12% in the fourth quarter of 2016.<sup>1</sup>**

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Voice assistants are a new frontier for many brands: a chance to literally begin a conversation with customers and field questions in real time. However, assistants run the risk of becoming intrusive.

A TV ad that triggers a virtual assistant to deliver a message is a clever exploit of fresh technology—yet besides being amusing or surprising, it does little to build a relationship or provide deeper benefit. This type of advertising may feel like a violation—a brand entering the home without permission over a device many aren't completely comfortable with yet. Users expect to hear from their assistants on their terms—having that assistant deliver a message on behalf of a brand is as jarring as having that brand's own voice come through their speakers. Voice assistants can help bring brands into users' lives, but the message must be meaningful in order to be well-received.

Voice assistants pose other challenges along with their opportunities. One is that each voice assistant has its own brand persona. Alexa is different from Siri is different from Bixby is different from Google Home is different from Cortana. This leaves very little room for a brand's own voice to be heard.

Brands have two choices. One: Create an assistant of their own, which is fraught with resource and adoption issues and is probably only viable for a handful of businesses. Two: Find a way that existing voice assistants can make interacting with that brand and business easier for users. The second option requires openness to partner with experts and stakeholders and to relinquishing total control of the brand experience. Both require a mastery of current technology, and the ability to anticipate consumer behaviors and needs.

What will successful executions sound like? They could take many forms.

This includes entering a hotel room and being greeted by a voice assistant automatically, with a custom itinerary based on personal interests. Integrations that allow users to check their account information, flight status, or tire pressure with a simple voice command. Syncing voice assistant information upon entering a store to deliver directions to sale items that users are interested in. There is no shortage of possibilities, but if the interaction is valuable, positive, and simplifies our lives, it will reflect well on the brand enabling it.

Voice assistants are just one timely example of the disruptive influence technology can have on brands. The same will be true for AI, driverless cars, augmented reality, automation—these new tools create friction as both users and brands come to grips with how they

technologies is not enough to get them to reach their full potential as brand and business tools. The brand experience needs to be a consideration from the start, and built in to help humans work with technology in harmony. Technology that is not translated through a brand can become a barrier between the business and its audience. A voice is a powerful tool, if it carries a relevant message.

<sup>1</sup> IDC - U.S. Intelligence Assistive Embedded Consumer Devices Forecast 2016-2020

<sup>2</sup> Google and Northstar Research Report 2014 - The Mobile Voice Study

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## Over half of US teens and **41%** of adults use voice search on a daily basis.<sup>2</sup>

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work and the best ways to use them. Growth brands know that the Age of You isn't over, and that simply using these

# Closeness does not equal engagement

Enabled by technology, branded experiences are more powerful than ever. Technology has brought brands further into people's lives. But don't mistake proximity for engagement. Simply displaying ads on smartphones and social media or getting a voice assistant to broadcast your message isn't a substitute for a real relationship.

New mediums for marketing such as VR and AR (the top two<sup>1</sup> most-searched

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**The virtual reality software and hardware market size is expected to grow to USD \$40.4 billion by 2020.<sup>2</sup>**

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marketing trends on Google) are in the hands of more customers each day. However, according to this survey, despite the attention each get in the media, the technology that the majority<sup>3</sup> of people want is mobile payment technology, with AR being the technology consumers say they want to use the least.

There are two insights here. One, the buzz around new technology does not necessarily align with what customers really want. Practicality and necessity come before impressive but less-relevant technology. Two, it shows that customers don't ask for what they can't imagine using. AR is an abstract concept—overlaying digital experiences in the physical world. However, that's not to say that once tangible applications come into play, it won't shoot to the top of their wish lists.

More tech means more places to communicate, but just because brands can doesn't mean they should. The

average adult already spends two hours and 51 minutes looking at his or her mobile phone each day.<sup>4</sup>

Increasingly, people are looking to unplug and get back to the real world. When accounting for all the different brands looking to communicate with them over proliferating channels, it's clear why so many want to unplug. Brands need to prioritize making their digital marketing meaningful, useful, and experiential—otherwise it's just more noise that audiences are increasingly tuning out. As such, they are beginning to see the value of real, in-person interactions more and more.

The digitally native generation doesn't remember a time without technology embedded into almost every facet of daily life. Their understanding and expectations of technology are different than the generations before them. They expect instant responses and an on-demand

world. It's up to brands to keep pace, or fall behind.

When it comes to the real world, brick-and-mortar experiences are not the dead end they were prophesied to be. They're becoming part of a cross-digital "brand ecosystem." These need to be strategically engineered around the user—digital is just part of the equation. People expect the full package: a great digital service with tons of capabilities, bolstered by a convenient physical location that enhances the online experience without any interruptions.

As IoT, AI, cloud technology, persona-building, and data analytics continue to work together to create surprising connection and capabilities, the idea of a brand ecosystem becomes more relevant. Via a mobile device, we carry around an instant connection to untold

data about ourselves as we move through the world. As more and more devices become connected, brands that want to be omnipresent will need to form partnerships with one another to get a complete view of the customer. For example, as voice assistants learn more about you and hospitality brands find more ways to work with connected technology, it's in the interest of both to work together to deliver a meaningful experience informed by shared pools of data.

As the world changes and brands grow, experience will become paramount. Brands that use technology in a way that improves and enables a positive experience are going to attract the ever-shifting interests of new customers.

<sup>1,3,5</sup> Code-Digital Trends 2017

<sup>2</sup> Statista - Virtual Reality (VR) Statistics & Facts

<sup>4</sup> Comscore - Mobile Matures as the Cross-Platform Era Emerges

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**1 in 5 are looking to disconnect from their screens and spend more time in the real world this year.<sup>5</sup>**

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# **Brand: From integration to acceleration**

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**Brands are how people understand  
a business on a deeper level.**

**We use them to make better choices,  
demonstrate loyalty, and determine  
value. But a brand's ultimate role is  
to accelerate business growth.**

**At a time when speed to market,  
customer centricity, and cultural  
alignment are vital, brands are the  
key to focused change.**

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# Design as a force of integration

Of the many shared characteristics across the Best Global Brands, for those that are mastering Growth in a Changing World, the elevated role of design in the enterprise is fundamental.

When design is brought up in the context of brand, it's often assumed

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**41% of design-led organizations report higher market share.**

**70% report having a stronger or best-in-class digital experience.<sup>1</sup>**

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that it's about aesthetic concern. While aesthetics remain a vital part of a brand, it cannot be isolated to what's visible—it must be internalized by the organization and harnessed as a force for change and improvement.

As brands are experienced in micro moments in the hyper-fragmented Age of You, design can be a powerful force for unifying a brand's experiences. It can make an instant impression and link moments in a way that's both memorable and meaningful. Design ensures that every aspect of an organization's brand is aligned, with little, if any, distinction between an organization's business strategy and its customer experience.

With increasingly complex organizational demands, design becomes a force of integration. The fundamental advantages of having design hardwired into the organization bolsters the strength of the brand in key ways:

**One is focus.** Excellent design delivers both a coherent customer experience and an elegant roadmap for future growth.

**One is clarity.** Design provides a shared point of view on the ideal customer experience, allowing everyone in the organization to know how they can each impact that experience.

**One is speed.** Design can be harnessed to breed efficiency. Macro design principles can quickly become micro applications.

**One is flexibility.** Embedding design methodologies into the organization allows teams to reinvent processes that adjust to different contexts.

## Design for the outside in and the inside out

At a time of hyper-personalization, organizations must communicate with

customers in a non-linear fashion. By understanding how people live and interact, organizations can structure themselves around their customers' priorities. Design derives power from its role as mediator—accounting for the interest of the customer and the desires of the business equally.

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**91% of design-led companies list design as critical to customer experience.**

**85% listed design as a critical component of brand.<sup>1</sup>**

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## Design for simplification and humanization

With hyper-fragmentation comes hyper-complexity. Rapidly shifting technologies and ever-changing customer demands create multifaceted, layered challenges for organizations. Design solves these complexities by rendering interactions

with technologies and other complex systems simple, intuitive, and pleasurable for the organization and the customer.

## Design for transformation and adaptation

Not all traditional organizations are built to handle continuous transformation. Fortunately, disruption and design go hand in hand. When introducing new ideas, design methodologies—such as validation and iteration—can help make the unknown comfortable by making ideas tangible and easier to socialize internally.

## Design for structure and culture

Becoming a design-led organization requires both cultural and structural rigor. For some businesses, how to solve for the customer—including processes and tools—may require an overhaul. Design-led organizations are driven by empowered employees who are empathetic to their audiences, and who deliver what people need, instead of what the job requires.

None of this means that design can't be beautiful, but above all, it must be functional—it should balance beauty and utility, efficiency and emotion. Purity of design can't be at the user's expense. More than a lofty and provocative goal, design is an essential tool for building strong, agile, customer-centric organizations.

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**Design is where a single touchpoint reflects the entire business, and where what's left out is as considered as what stays in. Where the customer and the experience are one.**

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<sup>1</sup> "Design-Led Firms Win the Business Advantage" a commissioned study conducted by Forrester on behalf of Adobe, 2016.

# The capabilities for change

While it's hard for businesses to keep up with constant change, the most significant toll is on its people. When market forces shift and businesses have to pivot, it can often bring more stress for everyone within the organization. Change is now coming so fast, so often, that a new wave begins before people have had a chance to recover from the last.

With these evolving market conditions driving new ideas, experiences, and models for growth, any external changes made by a company will struggle to gain a foothold if internal teams are not informed, engaged, motivated, or fully equipped with the right capabilities to create change and grow along with the organization. Especially given that change is not always immediately perceived as positive.

Change is what helps create new and engaging customer experiences, but without engaged and invested employees, this is impossible to

deliver. Organizations cannot afford to leave their people behind. And it takes much more than a declaration or reassurance from leadership. Change must be institutionalized. Flexibility, reinvention, and reorientation must be

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**50% of US workers have been affected by organizational changes in the last year, are currently being affected, or expect to be affected in the coming year.<sup>1</sup>**

---

second-nature—an inbuilt reflex, without a second thought. This will align the business ambitions with the evolving market conditions, and prime the organization for growth inside out and outside in.

This is where brand plays a key role. Not only is a brand the ideal vehicle for highlighting an organization's ambition and purpose in a way that's human and engaging, it also plays the role of integrator. Brands are increasingly deployed to bridge gaps across organizations, which are increasingly global, multidisciplinary, and siloed. The brand can bring coherence to varied customer experiences and touchpoints, and help companies leverage best practices and competencies from all corners of the organization.

With every change, it's important then for the brand to ensure that platforms, processes, and people are aligned.

operational capabilities	operational blueprint
platforms	inspire and motivate
process	educate and collaborate
people	create and activate
	support, consult, administer
	insight and measurement

## Platforms

To communicate this brand message consistently across time zones and language barriers, strong, centralized platforms are paramount. These can come in the form of: a fully-integrated brand portal; effective internal communication apps and services that reach people where they are without distracting them; reliable, intuitive databases and other technologies that share knowledge and drive business strategy forward. These platforms are essential to lowering the inevitable friction of working in an ever-more hectic and global marketplace.

## Processes

However, the best platforms in the world are nothing without efficient processes built in that empower employees rather

than pile on bureaucratic tedium and slow them down. When used correctly, they should lower barriers while ensuring that all brand communications are consistent, that responsibilities are clearly delineated, and that all brand activities point towards a broader strategy. Processes can help impart a broader culture of experimentation, giving people the leeway to try and fail so that they can imagine new ways to grow.

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**The most engaging, cohesive customer experiences are driven by high performing brand and marketing organizations.**

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## People

Building processes goes hand-in-hand with empowering people to embrace and lead change. This requires bringing people along on the journey, providing clarity on the destination, and most

importantly, investing in people with the right training, skills, and behaviors. For an organization to be primed for change, people need to know that the organization will equip them with everything they need to drive that change, and will provide rewards in the form of personal development. To achieve growth in the modern marketplace, this bottom-up approach is essential. Systems are important, but it's predominantly about people.

Strategy, culture, and technology are all beholden to real individuals. Not just inside the company, but outside of it as well. The core of this idea is truly intuitive: A brand is made by people, for people. Change is constant because customers are always changing, so for a brand to keep up with them, its people must be able to move just as fast.

<sup>1</sup> APA 2017 Work and Well-Being Survey

# Accelerating what matters

Businesses today have an overwhelming amount of data available to them, but data analysis often occurs in the rear-view mirror. Cumbersome data collection and analysis is not fast enough to respond to changes that brands need to make closer to real time.

In order to grow, companies need to move to a more predictive model of brand analysis. Amid constant change, they need to measure the data attributes indicative of what will truly drive business impact. It's the only way to move at the speed required to be ahead of the competition.

A strategic model combines brand, transactional, perceptual, and behavioral data in order to identify the right brand activations and drive the best business outcomes. This combined data approach outlines the key metrics of a business's performance, and provides a focused view into the micro indicators driving the macro changes.

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**From:**  
**Too much data, but not enough insight into how to take action.**

**To:**  
**A strategic brand model that helps make better business decisions.**

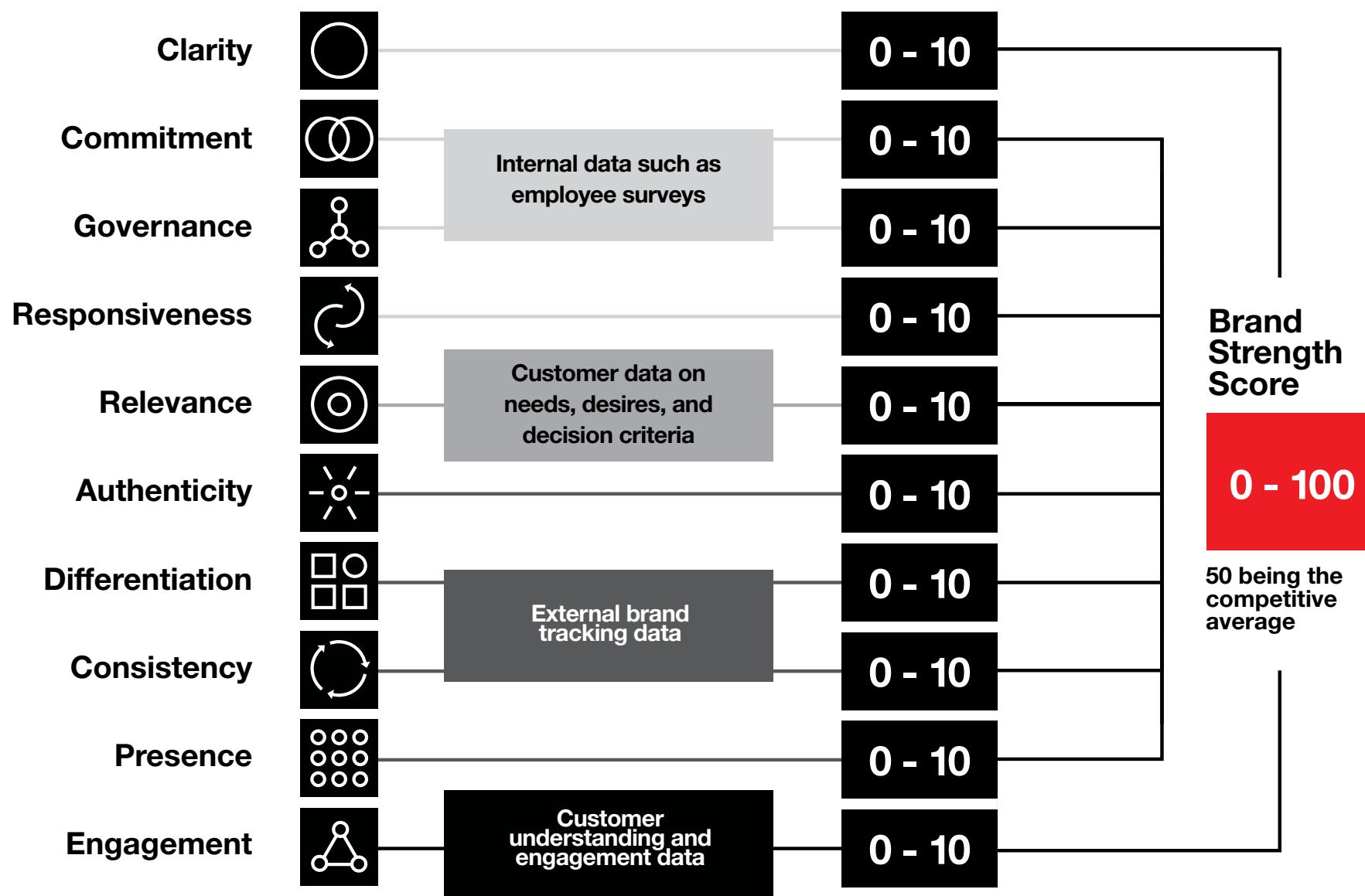
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This is a statistical model, based on the 10 Brand Strength dimensions (those used in the Interbrand Best Global Brands methodology to measure the performance of a brand) which identifies

the exact perceptual, behavioral, and transactional data sources underpinning each dimension.

These leading indicators help identify the processes, strategies, and behaviors that can be acted on quickly and directly to anticipate and affect real change, while driving demonstrable impact on business performance.

## **Brand Strength Assessment**



## **Data for the real world: Designed around the customer**

We know that delivering superior customer experiences drives business growth. However, these experiences are becoming increasingly challenging to create as the customer's journey becomes more complex.

Reams of data surround the measurement of the customer experience, which often creates a fragmented and reactive view. A connected source of data, one that provides a holistic view of people, is needed to keep pace with the speed of market change and customer demands. This ensures that data is dynamic and nimble so that activation can be highly

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**From:**  
**Disparate data driven  
by speed of market  
change.**

**To:**  
**A clear roadmap with  
prioritized actions  
that impact growth.**

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targeted. By prioritizing actions that truly impact growth, the right experiences will be created and delivered to the right person, at the right time and place.

## **Data for the real world: Designed for brand and business performance**

It is critical for organizations to stay focused on their long term goals while reacting to the shifting, test-and-learn culture of the digital user experience. Directing focused, daily brand and business decisions is possible through a detailed roadmap that identifies both immediate and long-term impact on business performance. Such a roadmap should also clearly model the relationship between brand metrics and business-level financial data.

Internally, this helps align different groups across the organization that may be responding to customers in vastly different ways, depending on the data that's pushing them for immediate action. If these units are not led by a central vision, internal chaos can occur, which can erode the brand's performance and break down the overall customer experience.

## **What a strategic model ultimately provides**

- 1** A business case to validate the focus and changes necessary to drive growth and improve brand and business performance.
- 2** A strategic roadmap that enables the right allocation of money and resources to the right areas, aligning all business and brand activities.
- 3** A rigorous approach to overhaul internal processes, institutionalize change in order to deliver relevant experiences, and ensure internal teams have the right capabilities.

To be truly ready for change, companies need to optimize the way they look at data, and not respond haphazardly. For focused business success, responses need to be consistent, dimensionalized, and underpinning a larger vision. Only with focus can a business truly accelerate growth.

# Top 100



# Top 100 Ranking

# Top 10





The Top 10 Brands  
hold 42% of the  
Best Global Brands  
total value.

# Hallmarks of the Top 10 Best Global Brands

## The customer is always first

All of the Best Global Brands make customers a priority, but the most successful make it THE priority. Whether it's engineering solutions tied directly to a strong customer understanding, anticipating what customers want with forward-thinking design, or just obsessively working to delight users at every opportunity—the Best Global Brands Top 10 make the people they serve with their brands their first consideration.

## Technology is a growth sector

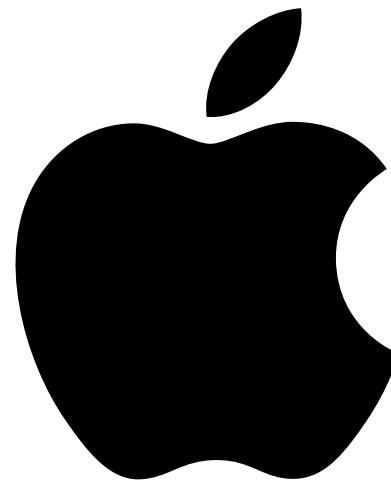
Half of the ten brands at the top of the Best Global Brands 2017 list are in the technology sector—Apple, Google, Microsoft, Samsung, and Facebook. Each one of these brands either moved up on the list or stayed in the same place, which is a testament to their continued momentum. Yet all of these businesses do much more than just create cool new technology. They have mastered creating experiences through technology that reinforce the value of the brand itself. For all ten brands, nothing is invented for the sake of it. New innovations merge seamlessly into an ecosystem of other experiences, totally oriented around the brands themselves.

## Radical flexibility

Despite strong legacies and investments in products and business practices that are renowned the world over, the Best Global Brands are ready to pivot at any moment to pursue growth. Nothing is so essential that it can't be reinvented. What was foundational one day can become outdated the next morning, but those at the top of the list have brands strong enough to maintain their relationships despite fundamental change. Radical flexibility means that tech giants can become grocery stores, food and beverage providers can become lifestyle brands, car companies can launch vehicles into orbit, and phone manufacturers can pioneer AI. When change is the new normal, anything is possible.

# Top 10

01

**184,154 \$m**

02

**141,703 \$m**

02

**79,999 \$m**

04



69,733 \$m

05



64,796 \$m

06



56,249 \$m

07



50,291 \$m

08



48,188 \$m

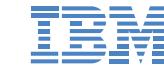
09



Mercedes-Benz

47,829 \$m

10



46,829 \$m

# Top Growing Brands





A total of 16 brands  
achieved double-digit  
percent growth in 2017

# Hallmarks of the Top Growing Brands

When it comes to shared characteristics, it's certainly no coincidence that the Top Growing Brands this year master Growth in a Changing World. Like most of the Best Global Brands, the top performers understand the value of their brands and cultivate them with great care. But they also exhibit some key characteristics:

## **Age and offering is irrelevant**

While technology is helping create new brands at lightning speed, growth is not reserved for the up-and-coming. The youngest Top Growing Brand, with the highest growth for the second year running, is Facebook at 13 years, growing 48% to break into the Top 10 for the first time. But across all sixteen brands with double-digit percent growth, ages range—the most established at 180 years young. It proves that understanding and embracing the “Grow, Change, Grow” cycle can create sustained brand and business growth. And while technology and financial services are the most represented sectors, the brands growing in double-digit percentages also come from retail, sporting goods, restaurants, logistics, apparel, luxury, and automotive.

## **Customer and people obsession**

Regardless of whether it's stated blatantly by each, Top Growing Brands understand intrinsically that brands start and end with people. When it comes to innovation and development, it's all deeply customer-centric, using data and measurement effectively to ensure strong engagement and impact growth. Everything they do is deliberately built around customers' needs and desires, and delivered through unique experiences. They also invest in their people internally—many of the Top Growing Brands have been recognized for their culture, workplaces, initiatives, causes, and dedication to their employees. These brands understand the power of people, and that great brands are built from within.

## **Clarity and focus**

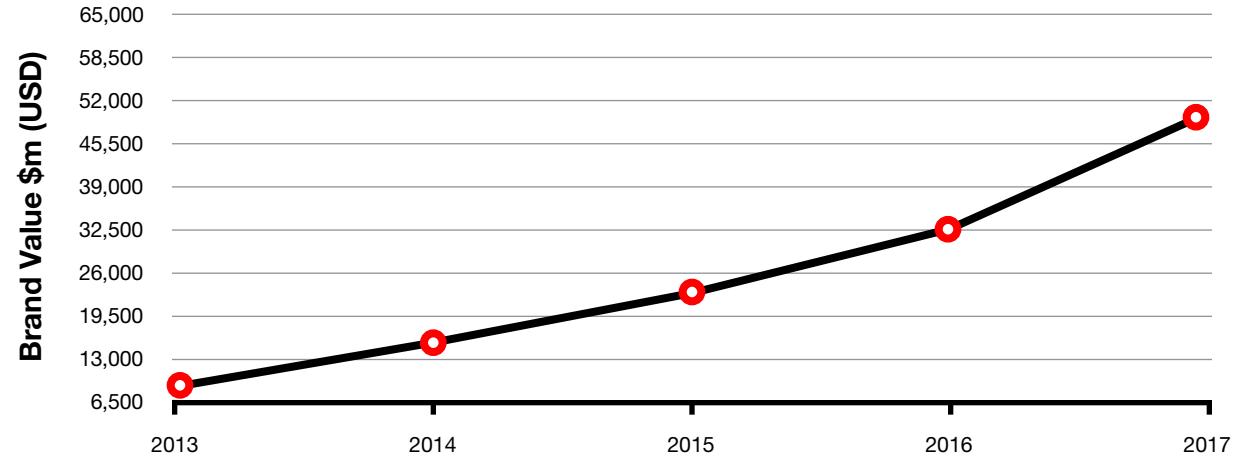
Having a clear strategic mission and a meaningful purpose is a vital characteristic. Most Top Growing Brands showed particular focus in this area, clearly articulating their ambitions, infusing these into behaviors and experiences, and reinforcing them at every opportunity to all stakeholders—customers, employees, and shareholders alike—holding each up to its delivery. These brands understand the power of an often simply stated proposition: It is the basis for any serious roadmap to growth, guiding every initiative and innovation. Whether they are tagline-like expressions that can be repeated with ease, or declarations and manifestos that demand action, there is no question of the brand's highest-order aim.

08



**+48%**

**48,188 \$m**



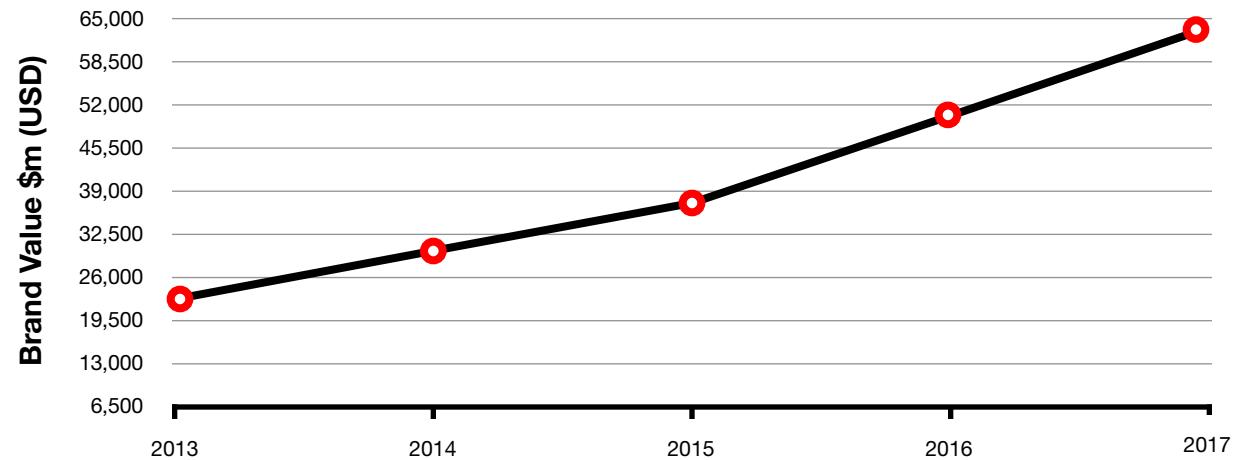
Facebook announced, during its F8 2017 conference, three strategic pillars for the future of the brand: connectivity, artificial intelligence, and virtual reality, each contributing to Facebook's mission to cultivate communities and bring the world closer together.

05



**+29%**

**64,796 \$m**



For 2017, Amazon is prioritizing three growth areas: Amazon Prime, which continues to attract millions of members; brick-and-mortar stores; and ongoing logistics innovation to improve service—all with true customer obsession.

56



Adobe

+19%

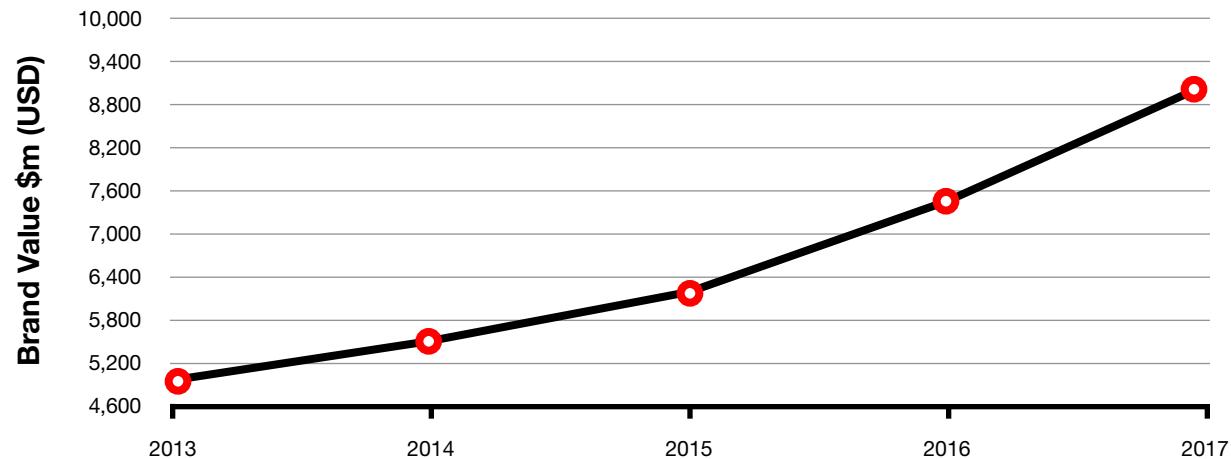
9,060 \$m

55

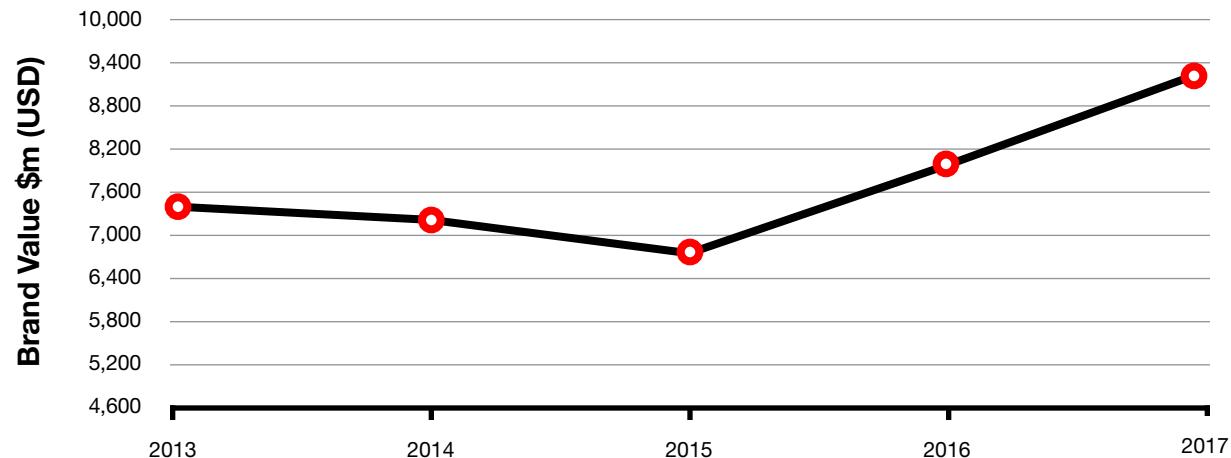


+17%

9,216 \$m



Adobe is clearly committed to innovation and leadership in digital media and digital marketing, with a focus on creativity in business and beyond, to fuel business growth. This includes personalization, content, advertising, and data and analytics.



For adidas, 2016 marked the first full year of “Creating the New,” a strategic plan aimed at accelerating growth by significantly increasing brand desirability, built around “three strategic choices of Speed, Cities, and Open Source.”

60



+16%

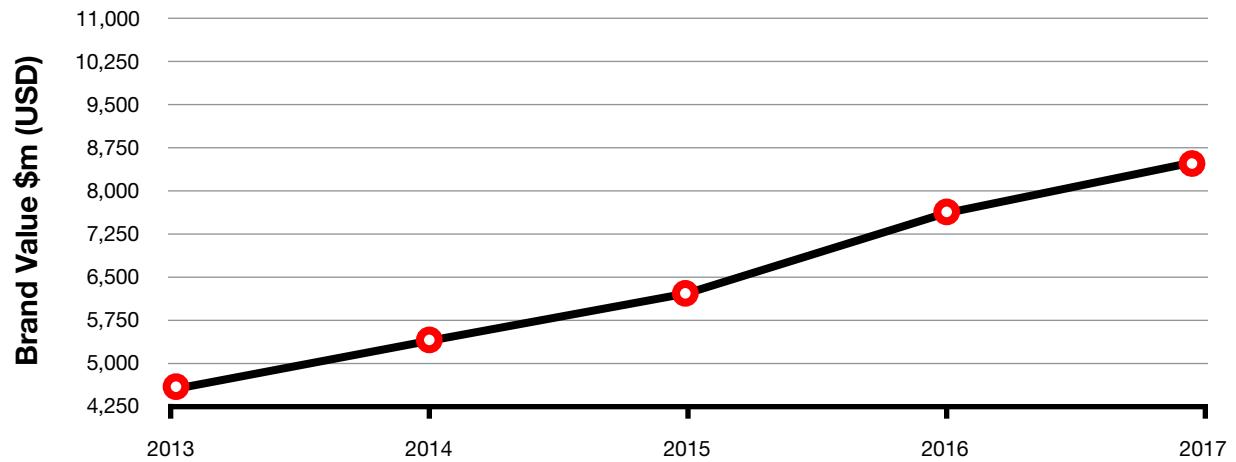
8,704 \$m

44

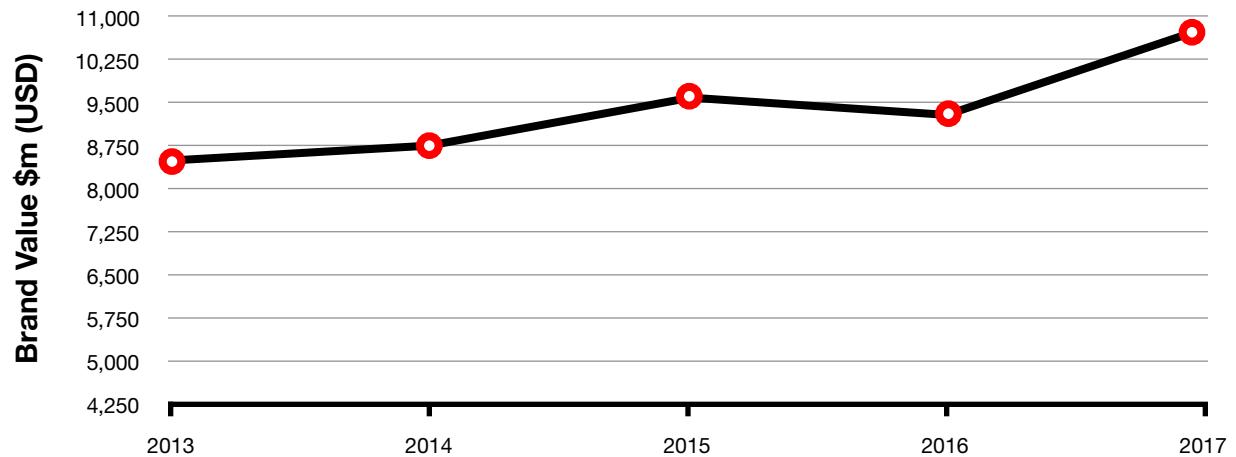


+16%

10,864 \$m



Starbucks' number one priority is to "restore Starbucks sales to historic growth levels." This year, Starbucks announced several strategic actions to optimize its store portfolio, strengthen its core, and accelerate the execution of its long-term growth strategy.



In its 2016 Annual Report, Goldman Sachs acknowledged how quickly expectations and conditions can change, and that by staying true to its strategic focus, the company can continue to generate industry-leading returns for shareholders and outperform over the long term.

70



+14%

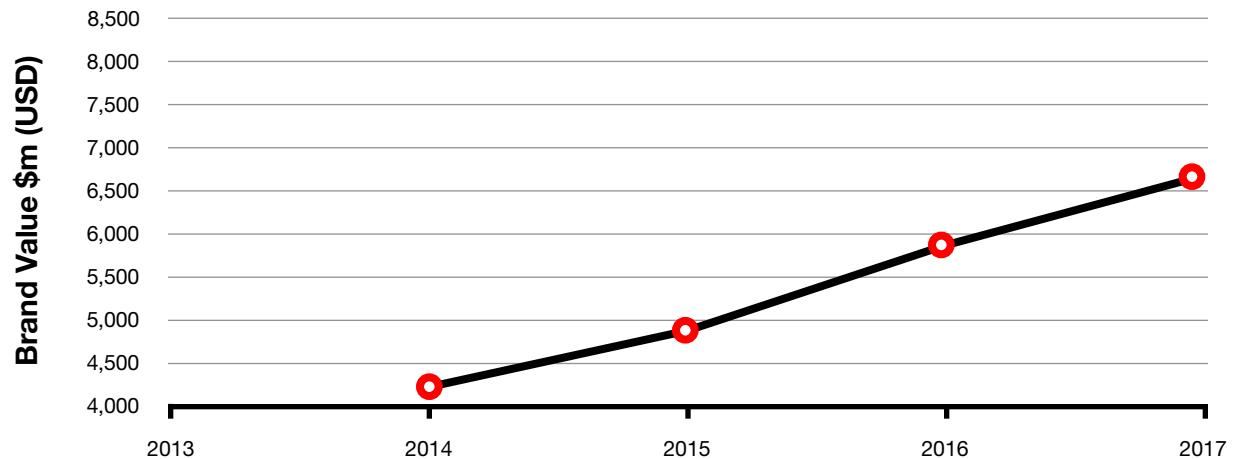
6,676 \$m

63

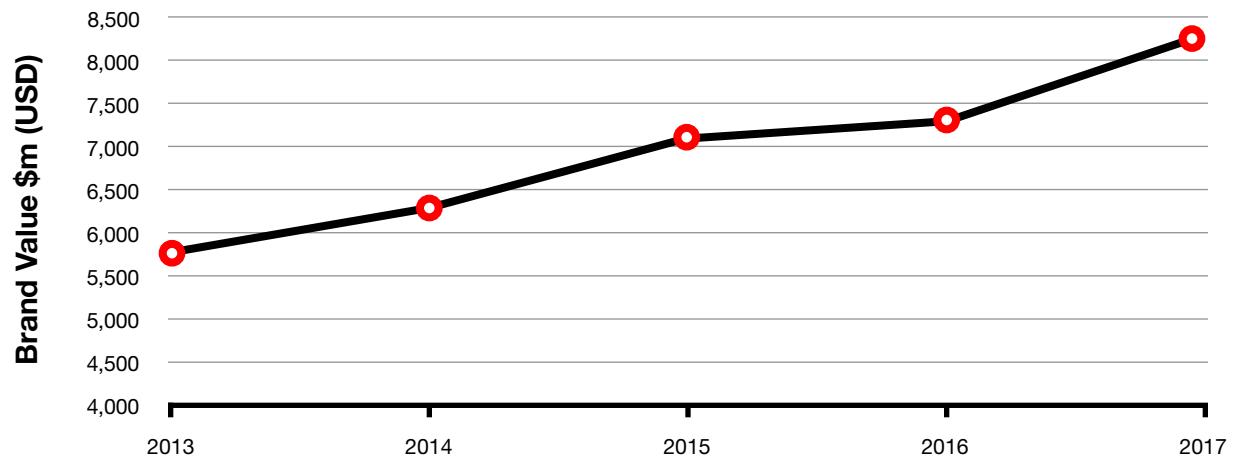
Morgan Stanley

+14%

8,205 \$m



Huawei launched its “All Cloud strategy,” which is focused on network modernization and aims to enable digital transformation within the enterprise. New campaigns have been billed under the tagline “Growing Together Through Digitalization and Building a Better Connected World.”



Morgan Stanley continues to maintain a leading position in the industry, investing in enhanced digital capabilities to maintain its competitive advantage and bolstering its internal teams to drive growth.

72



+12%

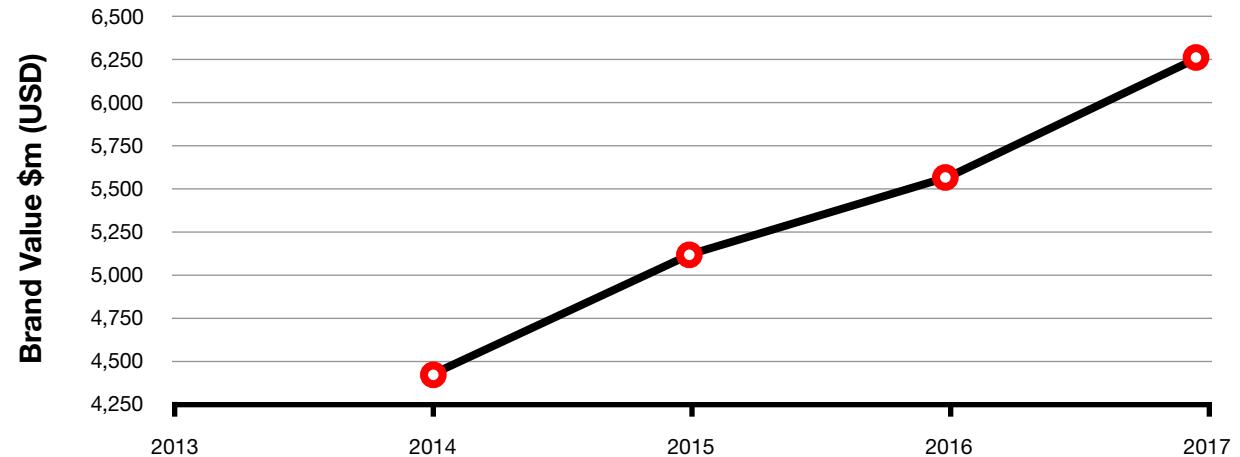
6,255 \$m

80

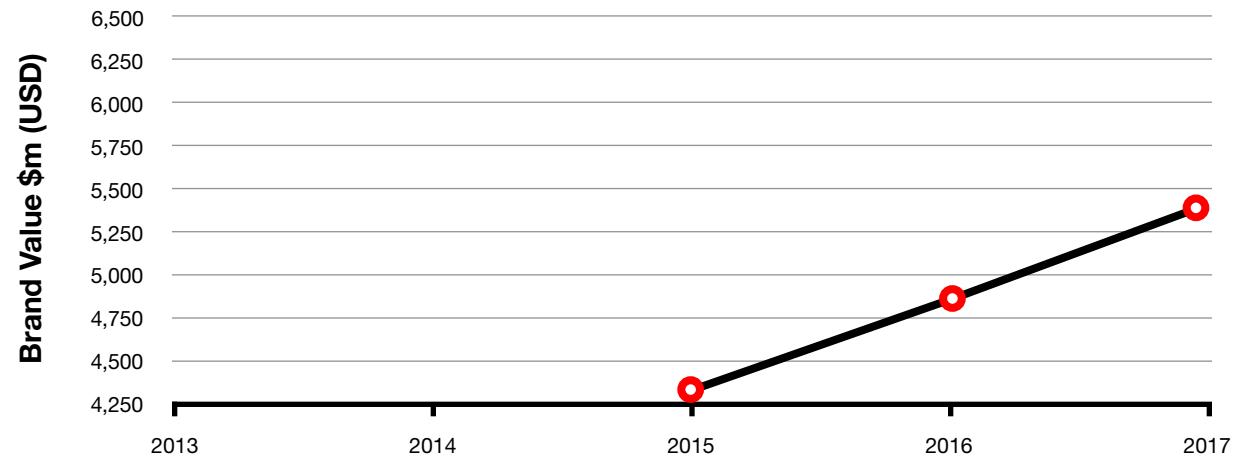


+12%

5,408 \$m



FedEx puts “The Purple Promise” and its values—people, service, innovation, integrity, responsibility, and loyalty—at the center of its brand and customer efforts. It’s a clear outline of what the company expects from employees and of its promise to customers.



PayPal is in its second year as an independent, publicly traded company. Its growth was fueled by a powerful technology platform, innovative products, trusted brand, and a network of strategic partnerships, which all help PayPal democratize financial services for people around the world.

# New Entrants



# New entrants

The 2017 new entrants span the Media, Technology, and Automotive sectors. Game-changing brands Netflix and Salesforce.com make their first-ever appearance among the Best Global Brands.

78 <b>NETFLIX</b> 5,592 \$m	84 <b>salesforce</b> 5,224 \$m	88  4,876 \$m
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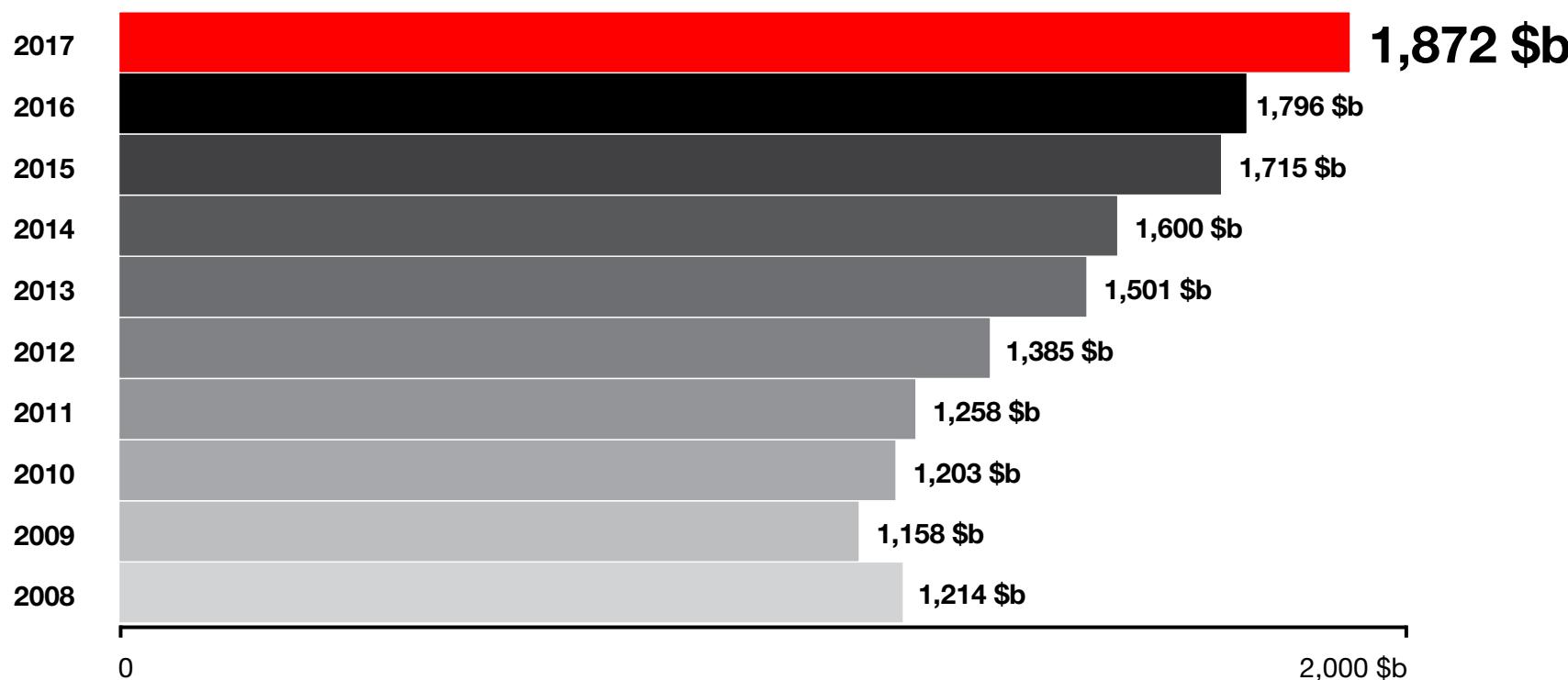
An aerial photograph of a winding asphalt road through a dense green forest. The road curves through the landscape, with a white dashed line visible in the center. The surrounding terrain is a mix of dark green foliage and lighter, rocky areas. The overall scene conveys a sense of travel and natural beauty.

# 10 Years of Growth

# Best Global Brands: 10 years of growth

Total brand value over the last 10 years has grown by 54%.

In 2017, it grew by 4.2%, and individual brand value by an average of 3.1%.



# Strong brands accelerate business growth

Best Global Brands consistently outperform in the market, compared to leading indices such as MSCI. This is because strong brands can protect a business in a downturn and boost it in an upturn—evidence that brands can be business accelerators in periods of both rebuilding and growth.



# Top 5 Sectors

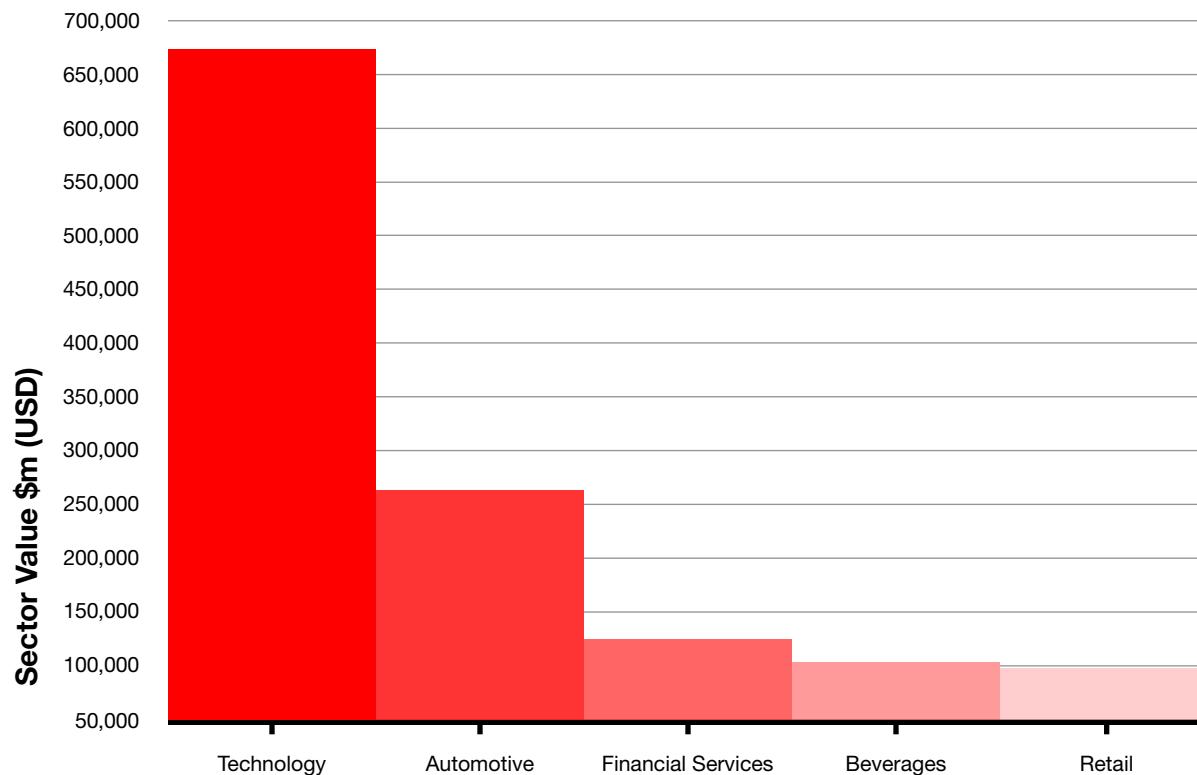




**Over half of the Best  
Global Brands are from the  
Automotive, Technology,  
Financial Services, and  
FMCG sectors.**

# Top 5 sectors

The five leading sectors in 2017 range vastly in number of brands and value—with a 578,746 \$m USD difference between Technology (15 brands) and Retail (3 brands), which rises into this year's Top 5, knocking out FMCG.



# Top Growing Sectors



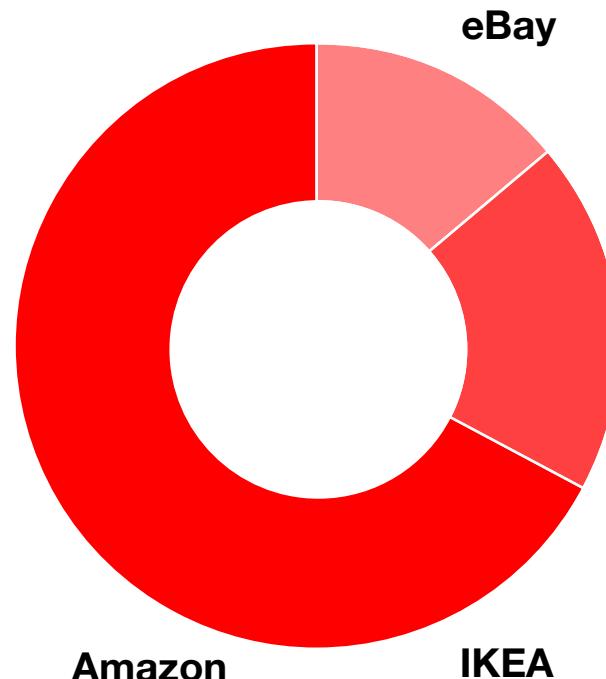


While the technology sector dominates, all top growing brands are translating technology into experience.

# Retail

## 3 Brands

Retail brands are putting convenience at the core of their experiences: IKEA (+4%) ramps up city-center pickups; while eBay (+1%) improves shopping and discovery, and grows its mobile offering; and Amazon (+29%) moves further into the real-world with stores, logistics centers, and delivery drones—and they're using VR and AI to add value to people's lives. All are growing based on a core ethos, whether sticking to sustainability targets, pricing principles, or a mission of user-empowerment.



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*"In a world in which 90% of the globe's retail spend still takes place in bricks-and-mortar spaces, retailers are beginning to explore inventive new ways of reconciling online expectations with the physical store experience."*

**John Michael O'Sullivan**  
Design Team Leader, HMKM

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**+18.7%**

Sector Growth

---

**5.2%**

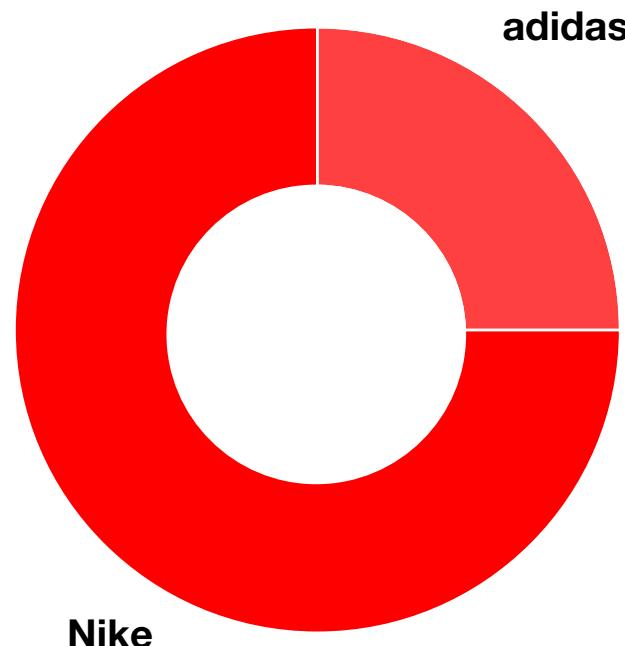
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**\$96,493 \$m**

# Sporting Goods

## 2 Brands

The sports sector has risen on its merits (and luxury's slight slip) to become this year's #2 Top Growing Sector. Brands are combining fashion, sports, and lifestyle to expand and deepen their reach, and thriving on partnerships with culture stars and sports icons alike. They're also tapping into widely-held values with innovative eco-offerings and equality-driven campaigns, while making leaps with new materials and technologies.



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*"In this new and constantly changing environment, there are new players, new materials, new technologies, and new demand: Exclusive designs can be sold out in a couple of hours all over the world."*

**Beto Almeida**  
Managing Director, Interbrand São Paulo

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**+10.1%**

Sector Growth

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**1.9%**

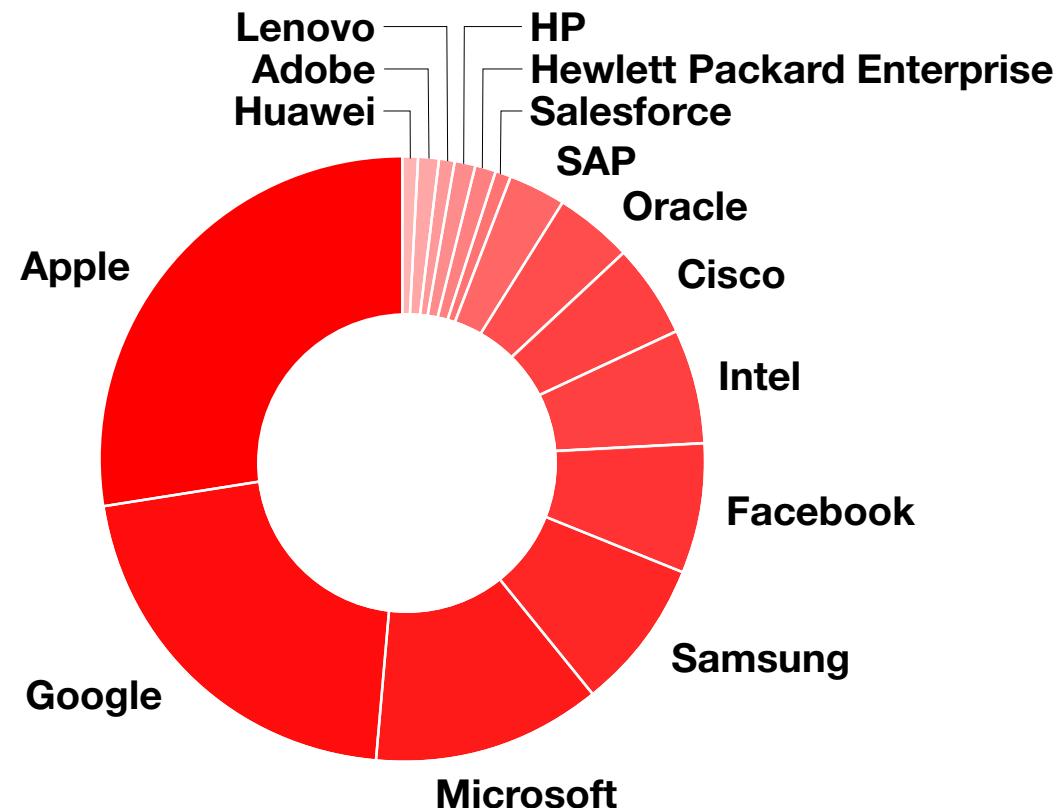
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**36,238 \$m**

# Technology

## 15 Brands

At \$675,239 million, technology is the most valuable sector, claiming half of the Top 10—Apple (#1), Google (#2), Microsoft (#3), Samsung (#6), and Facebook (#8)—and three of this year's Top Growing Brands. Creating connections is driving fast-risers like Top Growing Brand Facebook (+48%) and New Entrant Salesforce.com. Leaning on a legacy of innovation, tech leaders continue to diversify their offerings, while already-diversified incumbents are consolidating and pushing further into the cloud. Across the sector, new partnerships are popping up with the mutual goal of simplifying people's complex digital lives.




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*"With the shared goal of creating these truly connected and intelligent user-first experiences, technology brands have been forced to diversify their portfolios. This expansion has resulted in customers becoming competitors and competitors becoming partners."*

**Heather Baillie**  
Senior Director, Interbrand New York

**+8.4%**

Sector Growth

**36.1%**

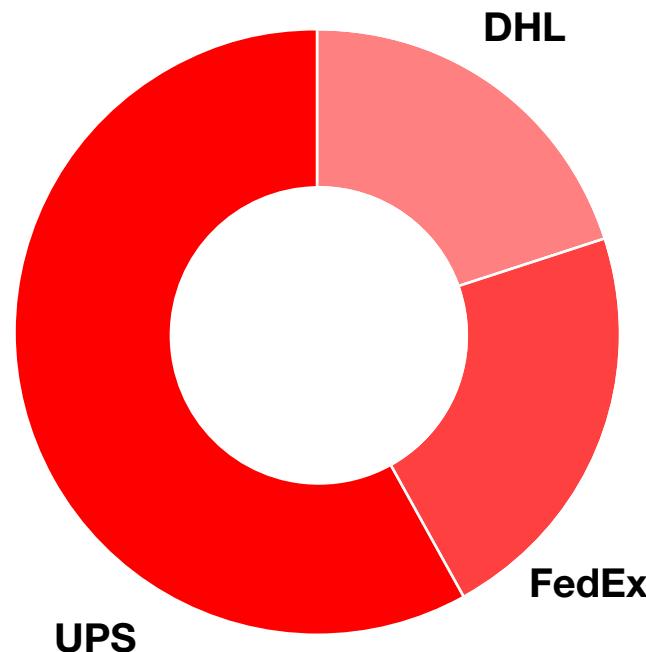
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**675,239 \$m**

# Logistics

## 3 Brands

This fast-shifting sector thrives by integrating technology into their brands and leaning hard on their core logistics missions. Tech-fueled solutions in fleet management and route optimization has had the triple benefit of improving productivity, enhancing customer service, and slashing CO<sub>2</sub> emissions. But with new non-traditional modes of delivery, from drones to cargo-sharing, logistics players will have to lean on the strength of their traditionally-visible brands while being open to new growth partnerships.



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*“Logistics carriers need to transform their businesses by closing the technological gap between capabilities and customer desires, and offering smarter and more sustainable solutions.”*

**Nina Oswald**  
Managing Director, Interbrand Cologne

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**+6.5%**

Sector Growth

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**1.5%**

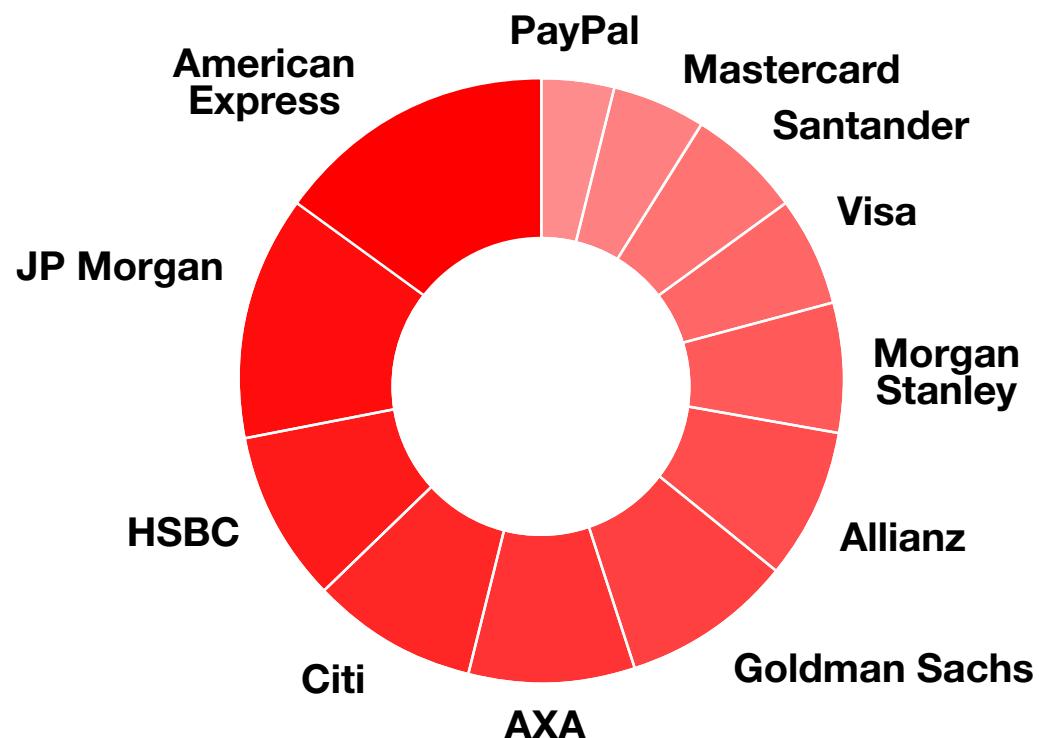
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**28,358 \$m**

# Financial Services

## 12 Brands

The Best Global Brands are making headway on their paths towards transformation and building trust, with Goldman Sachs (+16), Morgan Stanley (+14), PayPal (+12%), Mastercard (+11%), and JP Morgan (11%) among the Top Growing Brands. Even the largest institutions are super-focused on individuals, with an evolving message of helping people live better lives. They're treating customers like partners and partnering for growth, and adopting technologies that make life easier, from wearables to robo-advisors to blockchain. They're also cultivating employee engagement, recognizing that change truly starts from within.




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***“From payments to insurance, brands are rallying around inspiring ambitions to steer the profound transformations they want to make from the inside out.”***

**Eryn Murphy**  
Executive Director, Interbrand Paris

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**+5.8%**

Sector Growth

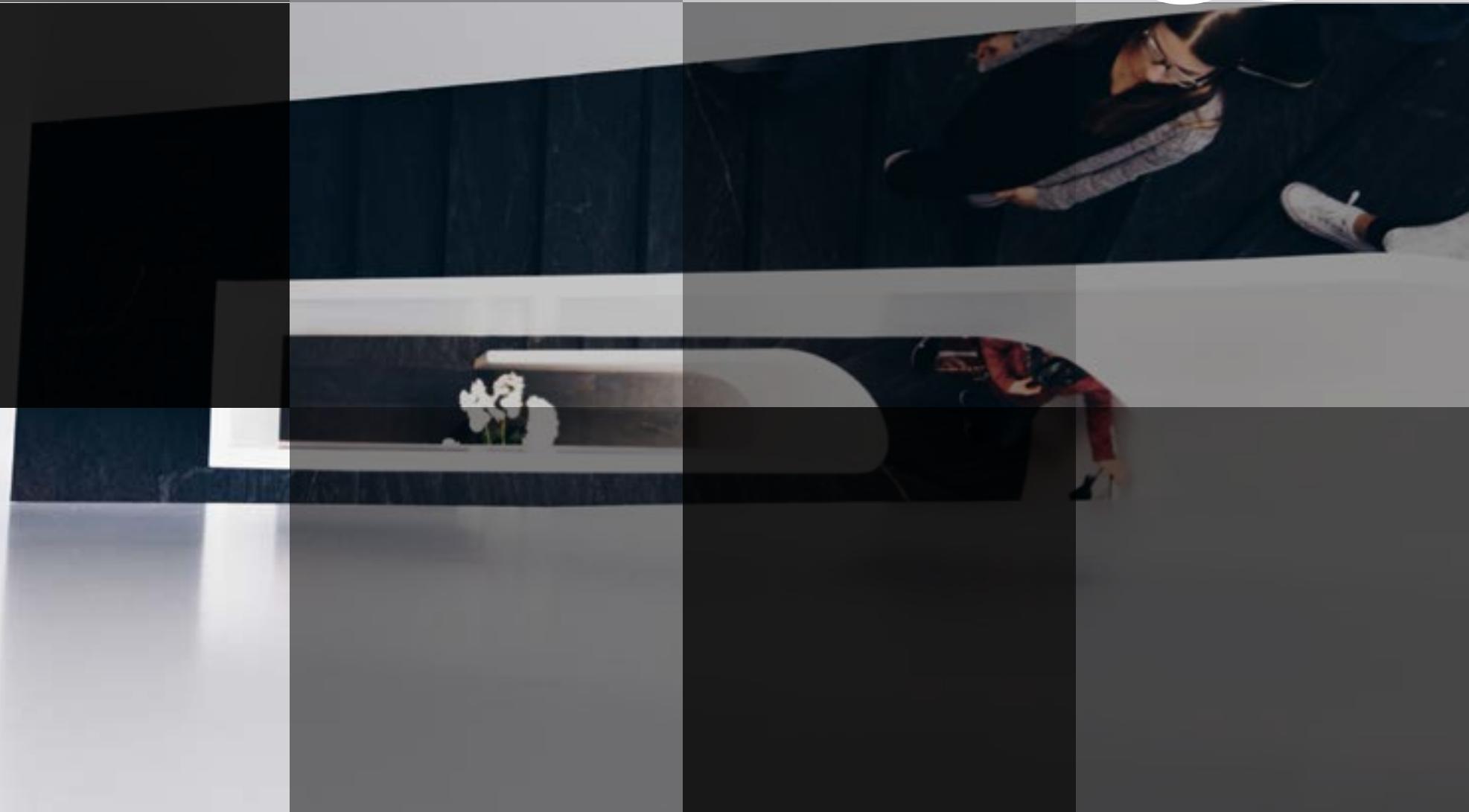
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**6.5%**

of the table at

**121,145 \$m**

# Methodology



# Interbrand valuation methodology



# Best Global Brands methodology

Having pioneered brand valuation in 1988, Interbrand has a deep understanding of the impact a strong brand has on key stakeholder groups that influence the growth a business—namely both current and prospective customers, employees, and investors. Strong brands influence customer choice and create loyalty; attract, retain, and motivate talent; and lower the cost of financing. Our brand valuation methodology has been specifically designed to take all of these factors into account.

A strategic tool for ongoing brand management, valuation brings together market, brand, competitor, and financial data into a single framework within which the performance of the brand can be assessed, areas for growth identified, and the financial impact of investing in the brand quantified.

For a more in-depth view, visit  
[bestglobalbrands.com](http://bestglobalbrands.com)

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## Financial data



Thomas Reuters and company annual reports

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## Consumer goods data



Canadean (brand volumes and values)

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## Social Media Signal

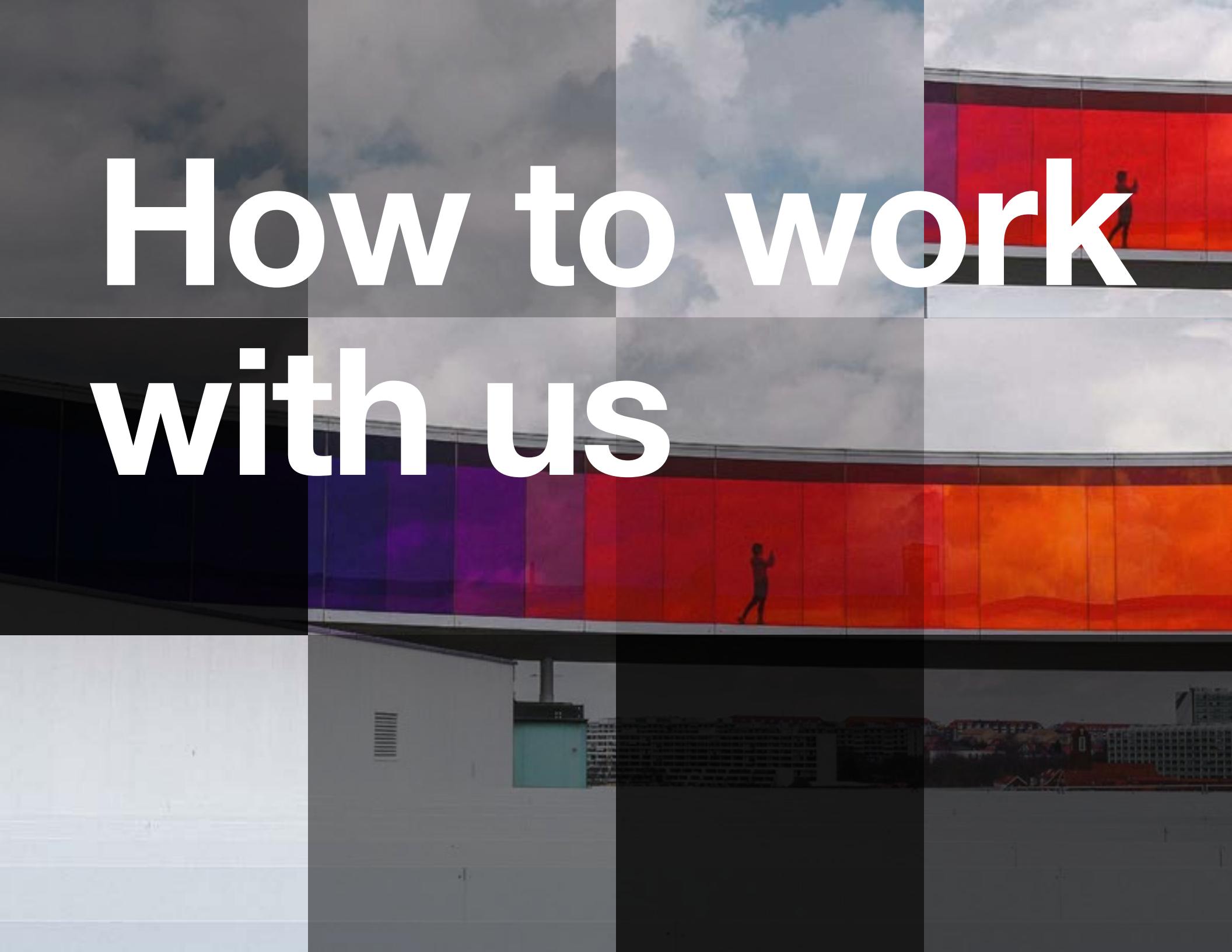


Twitter



Social media analysis by Infegy

# How to work with us



# How to work with us

At Interbrand, we're committed to helping companies of all shapes and sizes grow their brands and businesses. If you'd like to get a conversation started, here's a few ways to do so:

## Anatomy of Growth Study

Knowing that great brands are built from within, we're conducting a study designed to provide deeper understanding of what leading brands are doing internally to drive growth externally. We're inviting brands to participate to understand the opportunities and challenges they're facing when building cultures and capabilities.

## Growth Accelerator Session

Book a private, complimentary session with Interbrand to get an initial growth assessment. You'll work with a leading Interbrand team to design a high-level roadmap. We utilize our Brand Strength Factors—an essential part of our Brand Valuation methodology—and our Growth Accelerator to customize the session, and activate your growth agenda.

To participate in the Anatomy of Growth Study, to ensure you are on the list for published results, or to book a Growth Accelerator Session, please contact **Andrea Sullivan**.

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# About Interbrand

At Interbrand, we believe that growth is an outcome of a clear strategy and exceptional customer experiences, enabled by world-class capabilities. That's what we deliver through a combination of strategy, creativity, and technology that helps drive growth for our clients' brands and businesses.

With a network of 21 offices in 17 countries, Interbrand is the leading global brand consultancy, the publisher of the highly influential annual Best Global Brands and Interbrand Breakthrough Brands reports, and Webby Award-winning brandchannel.

For more information, please visit [interbrand.com](http://interbrand.com)

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