

D 100

DYNAMIC 100 BRANDS

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in partnership with IPG Mediabrands*

IPG MEDIABRANDS

Hello,

The world has changed. It is getting harder to keep up; people are moving faster than brands. Being the largest and oldest brand used to guarantee continued success. No one got fired for buying IBM and Eastman Kodak not only had a gold logo, it was the gold standard of blue-chip stocks to invest in. We are in a new world with new priorities. In addition to capturing huge investments and valuations, upstarts like GoPro, Uber, and SpaceX have captured public imagination. Brands that are valuable today aren't necessarily valuable tomorrow, and brands that no one had heard of five years ago have become worth more than those that have been around for decades.

Given this climate of change, existing brand equity measures are outdated. New brand metrics are needed. It's not enough that a brand was strong or performed well in the past. While that may be the case, today these indicators are less likely to drive future success. We need new indicators that capture how agile companies are and how responsive they are to consumer needs and changing market conditions. The degree to which they create innovative new products and services.

The D100 fills this need. IPG Mediabrand, in partnership with Jonah Berger, Associate Professor at The Wharton School of University of Pennsylvania and *New York Times* best-selling author, launches the D100 (Dynamic 100), a list identifying the world's 100 most dynamic brands. Brands are ranked using their dynamic score, a new world measure we've developed after extensive study and research. The score is calculated by assessing brands against four critical and equally weighted dimensions - agility, responsiveness, innovation and sociability. Importantly, we have proven

there is a direct relationship between a brand's dynamic score and its future momentum and revenue growth.

To construct the D100, we surveyed over ten thousand consumers across the world and collected data for over a thousand brands. In addition to the D100, or 100 most dynamic global brands, we indexed the most dynamic brands across key markets, as well as the most dynamic brands in a number of industry verticals.

The results not only help brands see how they stack up relative to their competition, but, identifies geographic regions and dimensions that can be improved upon. Some brands may be quite dynamic, for example, and have low awareness in certain countries. Others may be seen as innovative but lag in their responsiveness. Brands are considered dynamic when consumers perceive them as innovative, agile, and responsive.

In the pages that follow, we outline the construction and results of the D100. This includes a detailed description of each new world measurement, their methodology and principles, and how to use these findings to drive brand solutions or enhance client performance.

A new world. A new way. Welcome to the D100.



MAT BAXTER

Global Chief Strategy & Creative Officer

D100

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TOPLINE SUMMARY 4

The D100 indexes the most dynamic brands in the world and allows companies to benchmark their performance relative to their competitors. Over 10,000 consumers were surveyed across four global regions and in five major markets including the United States, United Kingdom, Germany, China, and India. Combining this information with social media data allowed us to measure four key dimensions of dynamism:



In addition to the D100, we've also indexed the most dynamic brands in each of the key markets, as well as the most dynamic brands in each of a number of industry verticals (e.g., CPG and automotive). The study results not only help brands see how they stack up relative to their competition, but identify geographic regions and dimensions where there is room for improvement. Some brands may be quite dynamic, for example, but have low awareness in certain countries. Others (e.g., Apple and Uber) may be seen as innovative but lag in their responsiveness.

To become more dynamic, brands need to be customer rather than product focused. Brands must be aware of their strengths but, more importantly, understand the customer needs and how they can then meet that need. Brands should not be satisfied with their current position and should always think about the future.

METHODOLOGY 5

This section provides a detailed look into the methods used to construct the D100. Five discussion areas are:

- *Global and local brands to examine*
- *Dimensions of dynamism*
- *Consumer perception data*
- *Social media data*
- *Ancillary data on company performance*

BRANDS EXAMINED

Before collecting information on the brands themselves, we first needed to determine which brands to investigate. There are millions of companies in the US alone, let alone worldwide, and many companies offer multiple brands. As with any inaugural investigation, it is impossible to capture the full breadth of options out there, but we used a few guidelines to shape which brands were examined. Future investigations can investigate change to explore a larger set of options.

While exclusion from the list of brands examined necessarily means that a brand cannot make the D100, inclusion on the list of brands examined does not mean a brand makes the D100. This should reduce concerns about biased sampling in the brands examined stage. While a convenience sampling method was used, just because a brand was examined does not bias its chance of making the D100 list.

We focused on five key markets: the United States, United Kingdom, Germany, India, and China. Given the desire for the D100 to represent globally impactful brands, these markets provide a diverse set of conditions, including both mature markets (e.g., the United States) and some emerging markets (e.g., India). Further changes to future investigations will have the ability to delve into Latin America and other markets as well.

We compiled two lists of brands to investigate: Global brands and market specific brands. Global brands were mostly large, multinationals that had at least some presence in multiple key markets (e.g., Coca-Cola, Nike, and BMW). This does not mean that every brand was offered in each

market, but we expected that some consumers in each key market would be familiar with the brand. We explicitly test this later through measuring consumer familiarity. We examined consumer perceptions of these brands in each of the key markets.

Market specific brands were often smaller brands and may only be offered in one of the key markets (e.g., Royal Mail or Hajmola). Given their lower global awareness, we only included these brands in the survey for their specific markets.

We developed the list of global brands through a combination of methods including examining existing brand lists, industry data, market performance and a variety of other factors. Note that while this global list is large, representing over 400 brands, it is by no means exhaustive. There are certainly additional brands, particularly smaller ones or those in more B2B markets, which were not examined. Given the desire for brands that most consumers were familiar with, we focused on larger, B2C companies. The research is not restrictive and brands can be added into the database as we continue to grow this study.

We used a similar methodology to construct the list of market specific brands. We consulted company specific media, existing brand lists, and industry information. We also reached out to IPG Mediabrand representatives in each key market to solicit any brands to include. The number of market specific brands varied across markets.

Overall, brands examined included both parent brands (e.g., ABINBEV, Johnson & Johnson, and Unilever) as well as sub-brands (e.g., Aveeno, Budweiser, and Dove). In many cases, consumers were less familiar with the parent brands, but having both types of data offers a variety of comparisons.

In total, we examined over 1,200 brands. The final database includes closer to 1,100 based on data that could not be obtained.

DIMENSIONS OF DYNAMISM

While generating the list of brands to examine, we also determined the key dimensions of dynamism. The objective was to capture different aspects that shape whether brands are dynamic. We also looked at existing brands indexes as well as surveyed academic literature on branding, including Aaker's work on dimensions of brand personality. The dimensions were meant to tap different aspects of dynamism, while also being conceptually distinct. Some brands may do well on one aspect, for example, but not on another.

We established four key dimensions of dynamism. They are:



Innovativeness - the degree to which brands leverage new technology and create innovative products and services



Agility - the degree to which brands adapt to changing market conditions



Responsiveness - the degree to which brands listen and respond to customer needs and feedback



Sociability - how large and engaged a brands audience is on social media

Importantly, what it means to be dynamic is itself dynamic in nature. What is dynamic today may not be five years from now. Thus these measures may be adjusted over time based on continued research.

Data on the first three dimensions was collected through consumer perceptions and the fourth was collected through social media data. Each dimension was z-scored and then averaged together to form a brand's overall dynamic score.

We considered other dimensions such as speed and scalability, but the desire to tap the same constructs across all brands examined, the above four measures were best. Future installments will have the ability to examine additional aspects of dynamism, or focus on certain aspects that are only relevant for a subset of brands.

One might wonder whether only small companies can be dynamic, but that is not the case. Dynamism isn't about size per se; it's about the ability and willingness to change. Company culture definitely plays a role here. Dynamic companies like Google make change part of their DNA. They're on the lookout for moonshots and willing to take risks. They encourage employees to work on side projects. The biggest challenge to dynamism is being satisfied with where you are and what you're doing. You have to always be looking towards the future and what is next. Part of this lies with company leadership. Good leaders drive their company culture and make sure dynamism is a key part.

CONSUMER PERCEPTION DATA

To understand how consumers perceive different brands, we collected data from over 10,000 consumers across the world. As noted above, the key markets were the United States (average age = 34.5, 50% male), United Kingdom (average age = 35.9, 51% male), Germany (average age = 33.7, 48% male), India (average age = 34.6, 52% male) and China (average age = 33.4, 53% male).

Data Collection

The data was collected with the help of an internationally recognized research firm that has access to consumers in different markets across the world. A similar number of consumers were collected in each country and data was collected over a multi-month period.

A few aspects of the sample population are worth noting as they impact interpretation of the results. The budget available necessitated using internet surveying methods. Given the developing nature of some of the markets examined (e.g., India), though, this means that not everyone from the participant populations was equally likely to participate. The sample definitely skews more towards an urban, digital savvy audience. Respondents had to have access to the internet and be willing to do surveys on the web. The upside is that these individuals may be more familiar with some of the global brands mentioned.

A number of methods were used to increase data quality:

- First, we included attention checks to tap whether participants were paying attention. Consistent with state of the art methods, these included simple questions following dense passages of text. If one did not read the text they would answer the question and be excluded. If one did read the text in detail, they would know to leave the answer blank.
- Second, we excluded any individuals who rushed through the study or took overly long to complete it (suggesting they went and did something else in the interim).
- Third, we dropped anyone who gave the same or almost identical answers to all the questions.

Survey Design and Instrument

The survey was conducted using the Qualtrics research platform. Participants were told that the researchers were interested in how people perceive different brands. They were told that some of the brands listed would be from the United States and some would be from other countries.

To improve data quality, each participant was given only a randomly selected subset of approximately 40-70 brands to rate. The participants received the global list of brands, while participants from each of the other countries received that list as well as any additional local brands.

Brand Familiarity

Importantly, we screened participants on brand familiarity. Not all participants may be familiar with all 40-70 brands they were shown. To avoid including brand perception data from individuals that were unfamiliar with a given brand, we first asked them a screener question. Participants were shown each of their assigned brands, across a few pages, and asked to mark whether they were familiar with the brand or not. For a given participant, we only collected additional data on brands they reported being familiar with.

Q | FOR EACH OF THE BRANDS BELOW, MARK WHETHER YOU ARE FAMILIAR WITH THE BRAND OR NOT

	FAMILIAR	NOT FAMILIAR
PHILIPS	●	●
LOUIS VUITTON	●	●
UBER	●	●
BANK OF AMERICA	●	●
ZARA	●	●
LANCIA	●	●

A couple points worth noting here as they impact interpretations:

- The familiarity variable doesn't measure whether consumers have ever bought something from the company, it just measures whether they report being familiar with the brand. Some portions of Indians may report being familiar with IKEA, for example, even if the company does not have any stores there. They may have traveled abroad or heard about the brand from others. Indeed, 38% of respondents from India reported being familiar with the brand.
- 38% by itself may seem high, but relative to other brands that number is quite low. The Coca-Colas, McDonalds, and Nikes of the world all have familiarity of more than 95%. 38% familiarity is around what TIM, Domestos, or Gazprom are in the US. All brands with little to no US presence.
- It is also important to remember that our sample is more metropolitan and digitally savvy.
- More generally, the data is most useful when we make relative comparisons. Do some people in India suggest they know something about IKEA? Yes. Is it anywhere near as many who say they know about brands with a large presence there? No.

- For all these reasons, we use a cut-off of 50% for including a brand on the most dynamic brands list for a given country

Key Brand Perception Measures

To improve data quality, each participant was randomly assigned to rate the brands they reported being familiar with on one of the three consumer perception dimensions (innovativeness, agility, or responsiveness). This avoided participants getting fatigued by the amount of work required and giving worse answers

For example, for participants assigned to responsiveness, respondents rated each brand they were familiar with on the following question.

**Q | HOW RESPONSIVE DO YOU THINK DELOITTE IS?
THAT IS, TO WHAT DEGREE DO THEY CHANGE THEIR
PRODUCTS, OFFERINGS, AND BEHAVIOR BASED ON
WHAT THE CUSTOMER WANTS?**

NOT AT ALL RESPONSIVE EXTREMELY RESPONSIVE



SOCIAL MEDIA DATA

Social media data was used to compute the sociability measure. We will briefly describe the data used and calculations made to compute the measure and then discuss some alternative methods that may be used in future iterations of the research.

The sociability measure incorporated data from the two major social media channels, Facebook and Twitter, and captured both (1) the size of a brand's audience as well as (2) the engagement of that audience.

Audience Size: Audience size proxies for the number of people that report liking or follow a given brand. For Facebook, IPG Mediabrand provided the number of likes the brand received on its Facebook page. Facebook likes are highly skewed, with the most popular brands receiving orders of magnitude more likes than others. To avoid these differences over-impacting the overall D100 score, we took the log of likes.

For Twitter, IPG Mediabrand provided the number of followers the brand had on its Twitter Page. Follower counts

are highly skewed, with the most popular brands having orders of magnitude more followers than others. To avoid these differences over-impacting the overall dynamic score, we took the log of follower count.

Audience Engagement: Audience engagement captures whether people actually respond to, or interact with, the content a brand posts. For Facebook, IPG Mediabrand provided the "number of people talking about" a given brand (which Facebook reports as a measure of engagement that combines likes, comments and other actions). Larger brands or those with more followers should clearly get higher numbers on this measure, so to normalize it, we controlled for audience size. We computed audience engagement as the number of people talking about the brand divided by the total number of page likes.

For Twitter, IPG Mediabrand provided the total number of likes a brands tweets received. Larger brands, or those with more followers should clearly get higher numbers on this measure, so to normalize it, we controlled for total number of tweets and audience size. We computed audience engagement as the number of likes a brands' tweets received, divided by the number of tweets, divided by the number of followers. All multiplied by a constant.

Sociability: To compute sociability, we z-scored each of these 4 measures and averaged them.

A couple of points here are worth noting as they impact results interpretation:

- A number of brands had no Facebook page or no Twitter page, which drastically reduced their scores on this measure.
- In some cases, sub-brands or parent brands did not have pages, so parent brand or sub-brand pages were used instead.
- Consequently, results of these measures should be interpreted with caution.
- Including measures of both audience size and engagement includes potential concerns with each. If we only measured engagement one could argue we did not account for the fact that some brands have a larger following. If we only measured audience size, one could argue that this is a passive measure and that brands can buy friends and followers.

In future versions of the D100, it would be ideal to capture the buzz a brand receives on earned media. That was originally the goal here, but data issues prevented that possibility. A brand may have no Facebook page, but get talked about a lot on individuals' personal pages, so earned media, or mentions on blogs, would be a better measure of buzz.

Future versions on the D100 might also examine sentiment of engagement. People may comment a lot on posts by a particular brand, for example, but if all those comments are negative, that is different than most of the comments being positive. That said, audience size metrics should only capture people that actually like the brand, and Twitter likes are only positive in nature. So while sentiment could be used to inform the metric even further it is unlikely that the current metric is heavily biased in this regard.

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RELATIONSHIP WITH COMPANY PERFORMANCE

Consistent with the goal of the list, results demonstrate that scores on the D100 are linked to company performance. More dynamic brands (e.g., those that score one standard deviation above the mean in dynamism) have 2.7% higher revenue growth. While this may not seem huge on its own, the average revenue growth across the brands examined is only 4.4%, so a 2.7% increase is significant. This suggests that D100 score may be a good indicator of future company performance.

Further, the relationship between dynamism and revenue growth persists even when controlling for more traditional brand metrics like brand awareness or size. This suggests that brand dynamism helps drive future performance above and beyond more traditional brand measures.

The relationship between dynamism and revenue growth is particularly driven by the Agility dimension and somewhat by the Sociability dimension. Agile companies also have a higher market cap. We thought that dynamic score might be correlated with stock performance but it was more strongly correlated with revenue.

By this, looking at whether future iterations of the project will allow us to more fully examine how changes in dynamism relate to profitability. Whether brands that become more dynamic also become more profitable over time.

DYNAMIC SCORES

To ensure that the brand lists reflected brands with decent awareness in the market studied, only brands that were familiar to at least 50% of respondents in a given country could make the dynamic brands list for that country. And only brands that were familiar to at least 15% of respondents in every country could make the overall D100 list.

The most dynamic brands on the global lists were

1| **Google**



2| **amazon**



3| **SAMSUNG**



Mercedes-Benz

4| **NIKE**

9| **Audi**

5| **intel**

10| **Lenovo**

The most dynamic brands tend to do quite well on all four dimensions, but there is certainly variation. Lenovo, for example, is seen as less agile and innovative but does well on social media. Amazon is seen as innovative, but less responsive to others outside the organization. Samsung is seen as agile, but has less engagement on social media than some of the others in the top ten. Google as the number one company does consistently well across the board.

It is interesting to see Lenovo doing so well (10th on the list), as it is not always mentioned in the same conversation as brands like Apple and Google. Philips also did quite well (13th) in part due to sociability but also responsiveness. Also interesting to see NASA as we don't always think of it as a brand.

BRAND	AGILE	INNOVATIVE	RESPONSIVE	SOCIALITY	DYNAMIC SCORE
 Google	6.89	7.04	6.91	6.94	69.45
 Amazon	7.12	6.52	6.39	7	67.56
 Samsung	6.99	6.80	6.31	6.4	66.25
 Nike	6.74	6.23	6.13	7.08	65.43
 Intel	6.22	6.60	5.82	6.78	63.56
 NASA	6.29	6.84	5.14	7.14	63.52
 BMW	6.04	6.33	5.74	7.16	63.17
Mercedes-Benz	6.27	6.39	5.55	6.74	62.38
 Audi	5.90	6.08	5.42	7.44	62.09
 Lenovo	5.69	6.09	5.39	7.48	61.61

Breaking down dynamism into its component dimensions, the most innovative brands were Apple, Google, and NASA.

- Apple has a strong reputation for innovative products like the iWatch, iPod, and new versions of the iPhone. While the press has argued that they have stagnated lately, they still have released a huge number of innovative products.
- Google, now Alphabet, is on the forefront of innovation. Driverless cars, modular phones, and a number of other initiatives in the ATAP project keep them at the vanguard.
- While a less traditional brands, NASA is certainly quite innovative in exploring new aspects of space.

DHL, Red Bull, and Lenovo had the highest Sociability score. Red Bull not only has a large fan base on Facebook, but they are highly engaged. While DHL and Lenovo's fan bases on Facebook and Twitter are smaller, they are highly engaged. The most agile brands are Amazon and Apple. In addition to Google and Apple, Amazon is seen as highly responsive to customer needs. Note, Apple does not make the top 10 in part due to the fact it does not have a Facebook page, which lowers their sociability score.

This list highlights that even the most dynamic brands have room for improvement. For brands that are not seen as innovative, how can they create new products and services, or get more credit for innovative work they may already be doing but that consumers are not aware of? For brands that are not seen as responsive, they need to improve their relationship with consumers and how caring they seem. For brands with lower sociability, they need to invest more in social media. Not just growing their follower base, but deepening their engagement with those followers, boosting liking and shares.

Brands such as FitBit (15th), GoPro (12th), and Tesla (17th) are on the noticeable rise. While they currently don't have as broad awareness but they are doing well on many dimensions of dynamism. Fitbit and GoPro have particularly high innovativeness scores, Tesla is seen as quite agile, and all do well on sociability. Fitbit has awareness of almost 60% in the US, but is below 40% outside the US. Tesla's awareness isn't above 60% anywhere. GoPro has low awareness in China, India and Germany.



**FOR GLOBAL CONSUMERS,
THE MOST DYNAMIC BRANDS WERE:**

1. GOOGLE
2. AMAZON
3. SAMSUNG
4. NIKE
5. INTEL
6. NASA
7. BMW
8. MERCEDES-BENZ
9. AUDI
10. LENOVO



**FOR US CONSUMERS,
THE MOST DYNAMIC BRANDS WERE:**

1. GOOGLE
2. AMAZON
3. NETFLIX
4. SAMSUNG
5. NASA
6. NIKE
7. FACEBOOK
8. SPACE X (ONLY 40% FAMILIAR)
9. SOUTHWEST AIRLINES
10. DISNEY



**FOR GERMAN CONSUMERS,
THE MOST DYNAMIC BRANDS WERE:**

1. SONY
2. AMAZON
3. SAMSUNG
4. AUDI
5. TESLA
6. GOOGLE
7. NIKE
8. NIVEA
9. GILLETTE
10. MERCEDES-BENZ



**FOR UK CONSUMERS,
THE MOST DYNAMIC BRANDS WERE:**

1. GOOGLE
2. AMAZON
3. DYSON
4. SAMSUNG
5. XBOX
6. MICROSOFT
7. AXE/LYNX
8. BEN & JERRY'S
9. SONY
10. PAYPAL



**FOR INDIAN CONSUMERS,
THE MOST DYNAMIC BRANDS WERE:**

1. GOOGLE
2. DISNEY
3. AMAZON
4. BMW
5. AMUL
6. NIKE
7. AUDI
8. FACEBOOK
9. FLIPKART
10. CADBURY



**FOR CHINESE CONSUMERS,
THE MOST DYNAMIC BRANDS WERE:**

1. INTEL
2. ALIBABA
3. WECHAT
4. NIKE
5. BMW
6. GOOGLE
7. ADIDAS
8. IKEA
9. SAMSUNG
10. IBM

CORRELATIONS BETWEEN DIFFERENT DIMENSIONS OF DYNAMISM

Below are the correlations between the different dimensions of dynamism. As expected, all the relationships are significant, but some are stronger than others. Agility and innovativeness, for example, are most strongly related, while the sociability measures are less correlated with the others, potentially because they were measured differently.



COUNTRY DIFFERENCES

Below are the average scores for the main global brands for each of the five markets on the three main consumer perception dimensions of dynamism (we leave out social scores and they are not specific to any one market). There are a number of reasons ratings could differ between countries (e.g., consumers are more or less familiar with the brands, they tend to rate things more or less positively, etc.) so any differences should be interpreted with caution. That said, consumers from India and China tended to provide higher ratings for the set of global brands. Consumers from Germany and the UK tended to provide lower ratings. Consumers from the US, Germany, the UK, and India tended to find the brands more responsive, while Chinese consumers tended to see them as more agile.

		AGILE	INNOVATIVE	RESPONSIVE
	<i>US</i>	5.06	5.21	5.29
	<i>China</i>	5.44	5.26	5.13
	<i>Germany</i>	4.46	4.59	4.68
	<i>India</i>	5.29	5.27	5.33
	<i>UK</i>	4.64	4.62	4.83

INDUSTRY DIFFERENCES

Below are the average scores for different industries.

	DYNAMIC SCORE	AGILITY	INNOVATIVENESS	RESPONSIVENESS	SOCIALITY	FAMILIARITY
<i>Electronics</i>	57.75	5.60	5.82	5.40	6.28	74%
<i>Technology</i>	55.35	5.45	5.51	5.26	5.92	62%
<i>Media & Entertainment</i>	54.61	5.36	5.22	5.07	6.19	57%
<i>Auto</i>	53.89	5.10	5.16	4.91	6.39	68%
<i>Restaurant</i>	53.85	4.98	4.59	5.09	6.88	60%
<i>Travel</i>	53.76	5.06	5.01	4.91	6.53	54%
<i>CPG</i>	53.69	5.08	5.03	5.27	6.10	57%
<i>Retail</i>	53.08	4.92	4.98	4.94	6.39	51%
<i>Transportation</i>	52.36	4.74	4.87	4.63	6.69	52%
<i>Food & Drink</i>	51.98	4.84	4.79	5.07	6.09	53%
<i>Consultative Services</i>	51.80	4.99	4.95	4.74	6.04	32%
<i>Telecommunications</i>	51.74	4.97	4.96	4.92	5.85	47%
<i>Manufacturing</i>	51.34	5.06	5.15	4.83	5.49	36%
<i>Insurance</i>	50.55	4.88	4.80	5.04	5.50	35%
<i>Financial</i>	50.23	4.86	4.84	4.82	5.57	48%
<i>Healthcare</i>	49.60	4.82	5.03	4.97	5.01	33%
<i>Energy</i>	47.72	4.64	4.49	4.82	5.14	43%
<i>Tobacco</i>	41.23	4.32	3.99	4.53	3.65	49%

As the figure shows, certain industries (e.g., electronics, technology, and media and entertainment) are seen as more dynamic than others (e.g., healthcare, energy, and tobacco). Industries that are seen as more dynamic tend to be more consumer facing, and contain brands that are more broadly familiar. This is important for two reasons. First, when evaluating how dynamic a brands is, given the variation across industries, it's important to compare brands to their industry average. Second, brands in industries that are seen as less dynamic have a great opportunity to not only outperform their industry peers, but to raise perceptions of their industries as a whole.

MASTER BRANDS AND SUB-BRANDS

One might imagine that there is a clear relationship between sub-brands and master brands (e.g., if one is dynamic the other is as well), but it is not that simple. First, sub-brands often get much more attention than master brands. There are many more ads and other marketing communication vehicles for sub-brands than master brands, so consumers have a much better sense of what sub-brands stand for. Second, consumers are not always aware of the link between master and sub-brands. Most consumers couldn't name all of Unilever's sub-brands or who makes Corona. For both reasons, even if a sub-brand are seen as dynamic it doesn't always rub off on the master brand, and vice-versa.

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BEST PRACTICES

When examining scores for a given brand, a few things are useful to keep in mind:

Compare scores to country or vertical averages

Comparisons are key. Knowing a brand has 37% familiarity or 6.25 on innovativeness doesn't mean much by itself, it only gains meaning in relation to the scores of other brands on the list. To determine how well a given brand is doing on a given dimension, compare that score to the average for that country or for its vertical.

Different countries are different

We've tried to control for inter-country differences, but some remain. Best to focus on scores within a country or for the same brand across regions. Below are the averages for each country.

	AGILE	INNOVATIVE	RESPONSIVE
US	5.06	5.21	5.29
China	5.44	5.26	5.13
Germany	4.46	4.59	4.68
India	5.29	5.27	5.33
UK	4.64	4.62	4.83

Different categories are different

You can still compare the scores, but it is not as fair a comparison as brands in different categories may have different scores in part because of expectations that vary across categories (rather than the performance of the brand itself). It is also easier to be dynamic in certain categories rather than others, given the way the market is organized. Technology companies often innovate, for example, while financial service firms tend not to.

To become more dynamic, brands need to be customer rather than product focused. Don't just think about what you're good at, what does the customer need and how can you meet that need. Don't be satisfied with where you are currently, always think about the future.

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