

THE CITIZEN BRANDS STUDY AND FRAMEWORK: EXECUTIVE SUMMARY

We're living in the era of expectation inflation. Brand leaders are being asked to navigate an ever-growing list of (often contradictory) demands from consumers, employees, investors, regulators and society at large to inspire, be profitable, contribute to society and grow.

In this landmark study, we explore the tensions at play – and set out an evidence-based, actionable framework, called Citizen Brands, for brand leaders to find balanced growth, in an unbalanced world.

METHODOLOGY

Supported by our research partner Savanta and Havas' management consultancy Gate One, we interviewed 105 brand leaders (senior marketers working in large blue-chip organisations), 120 professional investors (investing in large blue-chip organisations), and 5,300 people across generations (being at once consumers, future employees and representatives of general society). To reflect a global picture, stakeholder groups were drawn equally from the US, UK, France, Saudi Arabia and India.

KEY FINDINGS

To tap into the potential of Citizen Brands, we developed a brand and design framework to help brand leaders thoughtfully design their brands to balance the demands of the individual consumer (self) and those of people, employees, investors and regulators (society) to find balanced growth.

The Citizen Brands framework consists of:

Three levers to address the needs of the 'self'

- **Betterment** is about improving lives emotionally and functionally by making them easier, more enjoyable, more meaningful. It's about helping people progress in their lives.
- **Originality** is to inspire with unique value; to bring something both unique and valuable to people's lives.
- **Assurance** is to reliably deliver and in so doing, win trust. It's about consistently meeting people's expectations and delivering when and where it matters most.

Three levers to address the needs of 'society'

- **Inclusivity** is about opening access and opportunity. We mean it in the broadest of senses – designing products and services to be open and accessible to all.
- **Environmentalism** is about promoting a sustainable view of growth by taking action to reduce brands' environmental impact, integrating sustainable practices into ways of operating, and building operational resilience.
- **Contribution** is being part of and providing value to society. That contribution may take different forms – be it economic, cultural or creative. The idea is that brands are productive members of society: active contributors not indifferent extractors.

Our study explored attitudes to these levers across different stakeholder groups and markets. And the emerging picture is clear: investors, brand leaders and consumers all resoundingly endorse the six Citizen Brand levers (see next page).

The study also found:

Brand leaders are walking a reputational tightrope

94% fear not being seen to be doing enough in response to key societal and environmental issues, while 87% fear being perceived as too 'woke' by focusing on the same issues.

Brand leaders struggle to balance the demands of 'Self' versus 'Society' and grow

Two-thirds of brand leaders and investors interviewed feel unable to balance profitability with people and planet, and eight out of 10 struggle to balance expectations around people and planet with the need to maximise shareholder value.

Consumers feel equally trapped between cost and conscience

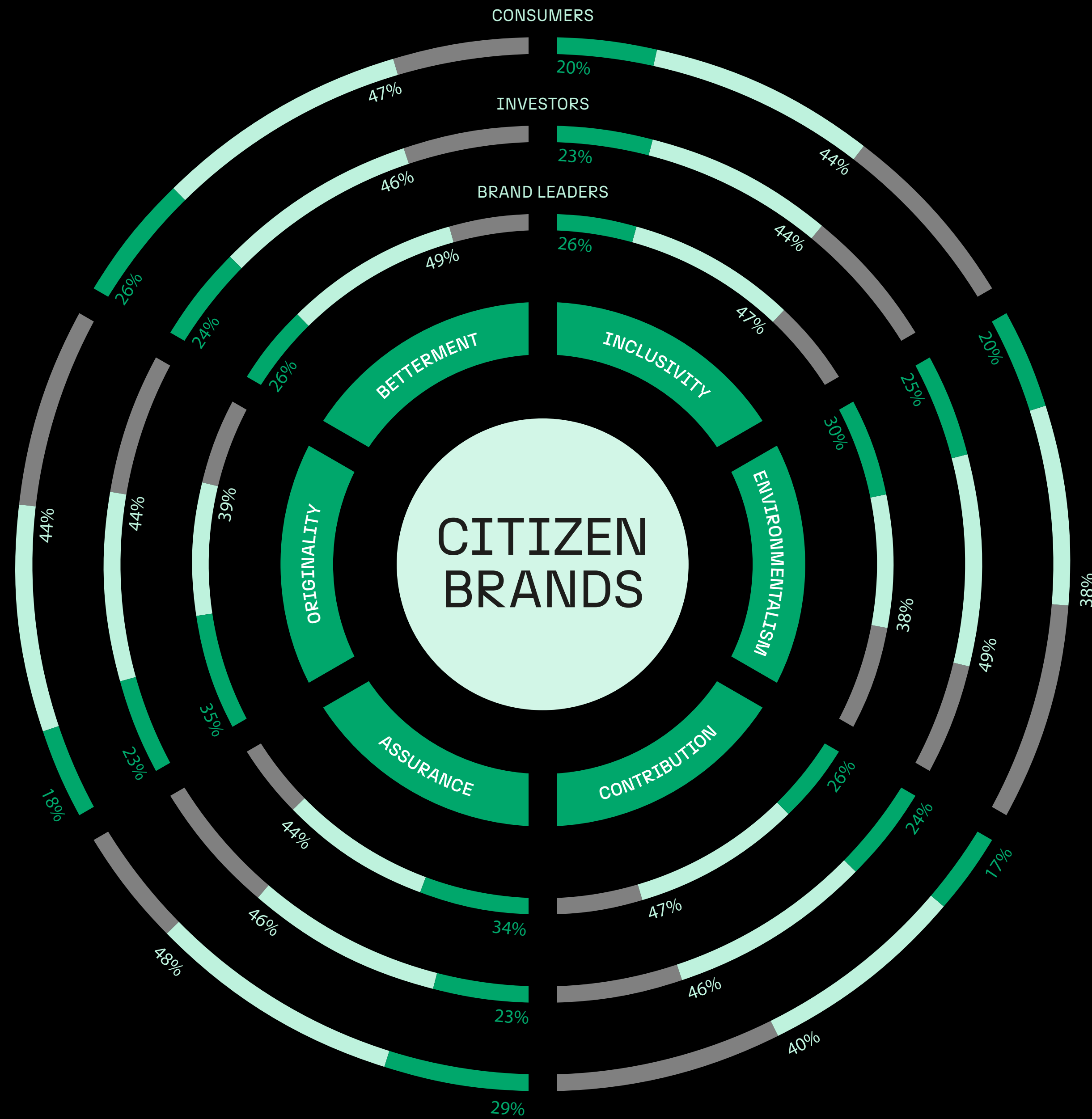
71% of consumers feel forced to choose between price and sustainability.

Citizen Brands balance the demands of self and society and drive balanced growth

The top 20 'citizen brands' – those able to meet the needs of both the individual and society – earned £8bn more in yearly revenues on average than their lowest-performing counterparts. They also achieved equity price increases that are on average five times higher than those of the lowest performers.

THE SIX CITIZEN BRAND LEVERS

- KEY
- Essential
 - Very important
 - Fairly important/
not important



SO WHO ARE THESE 'CITIZEN BRANDS'?

Who best embodies the attributes of a 'Citizen Brand'? As part of the consumer element of the study, we asked 5,300 respondents to rate 150 brands according to the six attributes, creating an index of Citizen Brands. Of these, 100 were global and 50 local, all group/parent brands with consumer visibility, spread across 10 diverse categories.

TOP 10 CATEGORIES

- Retail
- Consumer tech
- Consumer goods
- Energy
- Entertainment & media
- Health & wellness
- Financial services
- Mobility
- Fast food & beverages
- Travel & hospitality

GLOBAL TOP 20 BRANDS

01		11	
02		12	
03		13	
04		14	
05		15	
06		16	
07		17	
08		18	
09		19	
10		20	

50

Local Citizen Brands

100

Global Citizen Brands

REGIONAL WINNERS

Importantly, Citizen Brands are not just the preserve of global players. Each market has a solid representation of local champions in their top 20.

US

UK

France

India

Saudi Arabia