How consumers rank leading brands, why disrupters are gaining ground and what companies can gain by simplifying.

Global Brand Simplicity Index 2015

Presented by David Pulaski
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IleX, Atlanta
WHAT’S THE KEY TO BUILDING A BETTER BRAND EXPERIENCE?
SIMPLICITY.
THE IMPACT OF SIMPLICITY
SIMPLICITY BY THE NUMBERS

STOCK GROWTH

214%

LOYALTY

69%

PREMIUM

63%

Simplicity Portfolio

+293%


+105% S&P

+102% DAX

+78% DOW

+33% FTSE

350%
300%
250%
200%
150%
100%
50%
0%
-50%

300%
INDUSTRIES DON’T STACK UP EVENLY ACROSS MARKETS

Perceptions of industry performance differ by region. Here is a country-by-country industry against the global industry ranking.
2015 US BRANDS

Who’s leading, who’s lagging?
<table>
<thead>
<tr>
<th>Rank</th>
<th>Brand</th>
</tr>
</thead>
<tbody>
<tr>
<td>115</td>
<td>American Airlines</td>
</tr>
<tr>
<td>116</td>
<td>DIRECTV</td>
</tr>
<tr>
<td>117</td>
<td>FARMERS INSURANCE</td>
</tr>
<tr>
<td>118</td>
<td>dish</td>
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<tr>
<td>119</td>
<td>aetna</td>
</tr>
<tr>
<td>120</td>
<td>UnitedHealthcare</td>
</tr>
<tr>
<td>121</td>
<td>Cigna</td>
</tr>
<tr>
<td>122</td>
<td>Time Warner Cable</td>
</tr>
<tr>
<td>123</td>
<td>Humana</td>
</tr>
</tbody>
</table>

**Bottom 10 United States Brands**

124 | Comcast
<table>
<thead>
<tr>
<th>HIGH SCORE/LOW PREMIUM</th>
<th>HIGH SCORE/HIGH PREMIUM</th>
</tr>
</thead>
<tbody>
<tr>
<td>H&amp;M</td>
<td>Netflix</td>
</tr>
<tr>
<td>LG</td>
<td>Apple</td>
</tr>
<tr>
<td>Microsoft</td>
<td>Nike</td>
</tr>
<tr>
<td>Canon</td>
<td>Sony</td>
</tr>
<tr>
<td>Nokia</td>
<td>IKEA</td>
</tr>
<tr>
<td>Amazon</td>
<td>Adidas</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>LOW SCORE/LOW PREMIUM</th>
<th>LOW SCORE/HIGH PREMIUM</th>
</tr>
</thead>
<tbody>
<tr>
<td>Reebok</td>
<td>Toyota</td>
</tr>
<tr>
<td>Gap</td>
<td>Audi</td>
</tr>
<tr>
<td>Bosch</td>
<td>Mercedes-Benz</td>
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<tr>
<td>Holiday Inn</td>
<td>Puma</td>
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<tr>
<td>Haier</td>
<td>BMW</td>
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<tr>
<td></td>
<td>Virgin Mobile</td>
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<td></td>
<td>HTC</td>
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<td></td>
<td>Lufthansa</td>
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<td></td>
<td>Avis</td>
</tr>
<tr>
<td></td>
<td>Marriott</td>
</tr>
</tbody>
</table>
SIMPLY SOCIAL

ENTERTAIN BEFORE YOU SELL

GET NOTICED, BUT DON’T DISRUPT

EXPLORE SOCIAL MEDIA FOR CUSTOMER SERVICE

WHY PEOPLE USE SOCIAL

- Connecting with friends, family and coworkers: 81.0%
- Finding sources of entertainment: 77.0%
- Staying up to date on the news: 73.7%
- Learning about brands, products and services: 65.5%
- Engaging customer service: 44.8%
CONNECTING WITH FRIENDS, FAMILY AND CO-WORKERS

What activities do people find simple?

- **Maintaining existing relationships**: 82% (Youth) vs. 83% (Older)
- **Getting updates from brands and businesses**: 74% (Youth) vs. 61% (Older)
- **Getting access to influencers/celebrities**: 68% (Youth) vs. 49% (Older)
- **Making new friendships**: 60% (Youth) vs. 57% (Older)
- **Establishing professional relationships**: 56% (Youth) vs. 62% (Older)
- **Making romantic connections**: 48% (Youth) vs. 41% (Older)
LEARNING ABOUT BRANDS, PRODUCTS AND SERVICES

Which platforms do people use to discover new products and are they simple?

- This platform makes discovery simple
- I use this platform for discovery
STAYING UP TO DATE ON THE NEWS

How do people stay up to date on the news and are those platforms simple?

- This platform makes staying up to date simple
- I follow brands on this platform

[Graph showing platform usage and brand following percentages]
2015

SHIPPING / MAIL
DEEP DIVE
Industry rankings

DHL  FedEx  UPS  USPS
For shipping/mail, FedEx is #1 globally, but UPS dominates in the US

<table>
<thead>
<tr>
<th>GLOBAL RANK</th>
<th>US RANK</th>
</tr>
</thead>
<tbody>
<tr>
<td>FedEx 60</td>
<td>UPS 21</td>
</tr>
<tr>
<td>DHL 69</td>
<td>FedEx 40</td>
</tr>
<tr>
<td>UPS 73</td>
<td>UPS 61</td>
</tr>
<tr>
<td>USPS --</td>
<td>DHL --</td>
</tr>
</tbody>
</table>
UPS is easy, reliable and helpful, but not always

“Always an easy transaction/tracking system.”

“I find it simpler because they are extremely reliable and make things easy to deal with.”

“The UPS stores are generally well staffed and very helpful.”

“Not as convenient locations.”

“Bad customer service experience, no resolution offered for my problem.”

“They put a lot of information out & are constantly changing.”
FedEx can be more complicated and less efficient than UPS

“They have simpler tracking process and cater to delivery needs.”

“Have to ask multiple questions at times to know what you need for shipping.”

“Easy process all computerized.”

“Not as efficient as UPS.”

“Makes it easy to keep track of packages online.”

“UPS is easier to navigate.”
Bureaucracy and poor customer service threaten simplicity

“Very easy to use their service. They have machines in the lobby you can use after hours.”

“Simple, local mail delivery and shipping.”

“The mailbox in front of my house is easy to check daily and should I need to ship a package the Post Office is easy to get to.”

“Usually a long line any time you need to go there in person.”

“Too many rules and rates; not enough helpful employees.”

“USPS does not have good costumer service or communications. They are just like any other government organization and are disliked.”
Thank you

#simplicitypays

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