USA

BRAND INTIMACY STUDY **2018**

MBLM

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The largest study of brands based on emotion

Each year we produce the largest study of brands based on emotion. Across three countries we examine how 6,000 consumers bond with the brands they use and love. We are entering the eighth year of our journey in defining a new paradigm in marketing that we call Brand Intimacy. We are excited by the findings emerging this year; the fast-rising and those brands that excel with Generation Z point to a bright future. Brands within the smartphone ecosystem continue to thrive as do automotive brands, with a new surprising entrant in the Top 10.

With such a wealth of findings, we have decided to parcel out the detailed industry findings throughout the year. Each month or so we'll release more results and do a deep dive into the top-ranking brands and key insights specific to that industry. The more we learn about the performance of intimate brands, the more we apply those lessons in our practice with brands of every shape and size. Perhaps what is most exciting is that the Top 10 Most Intimate Brands continue to outperform the S&P 500 and Fortune 500, demonstrating that building stronger bonds with customers creates a strong financial return.

Enjoy the 2018 Brand Intimacy Report on the top-performing brands in the U.S.!

Why Brand Intimacy?

While the world around us has changed dramatically and impacts how we consume, buy and sell, approaches to marketing and brand building have largely stagnated. We created Brand Intimacy to provide a new paradigm in marketing, designed for today's complexity.

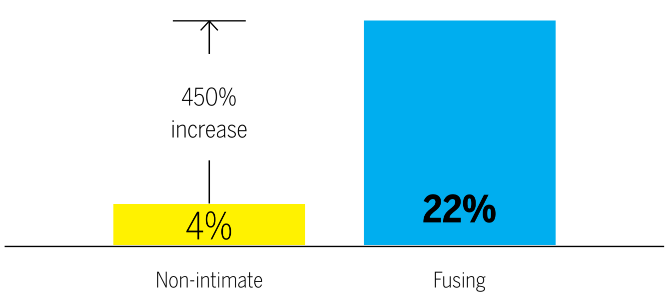
Advantages:

- Provides greater price resilience
- Centers on emotion, which drives behavior and willingness to purchase
- Encompasses latest advances in neuroscience and the science of decision-making
- Measures and details our emotional connections with the brands we use and love
- Customer-centric and based on reciprocity
- Leverages technology to establish an ecosystem for building bonds

Price Resilience

In addition to revenue and profit, we also reviewed price resilience. We continue to see that as consumers move from non-intimate to highly intimate (fusing), so does their willingness to pay a premium for the brand.

Willing to pay 20% more for brand

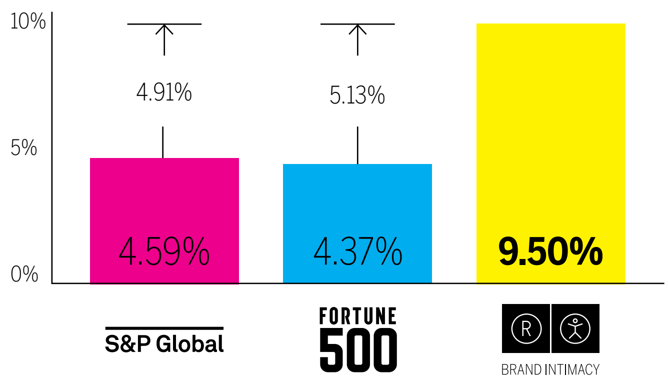


Outperforming leading financial indices

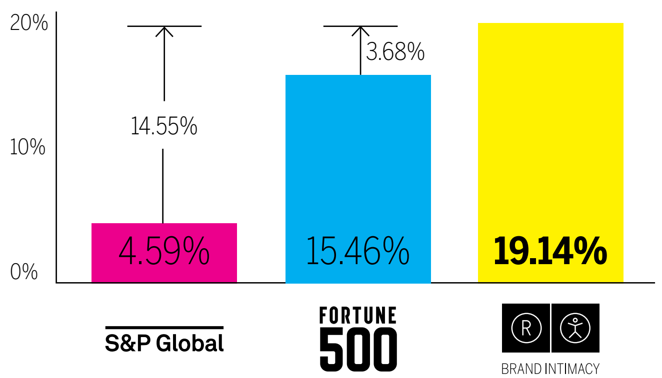
As has been the case in past years, intimate brands continue to outperform established financial indices for both revenue and growth over the past 10 years.

We compiled the Top 10 companies from the Brand Intimacy Rankings, Standard & Poor's 500 and the Fortune 500 lists. For each brand, our teams gathered the reported revenue and profit/loss for the years 2007-2016 from their annual reports and Form 10-Ks. From the data, we then calculated the average year-over-year growth rates for both revenue and profit for the 10-year period. Top intimate brands deliver superior results related to revenue and profit growth, suggesting the importance of emotion in driving the world's leading brands.

Average revenue growth 2007-2016



Average profit growth 2007-2016



U.S. Rankings

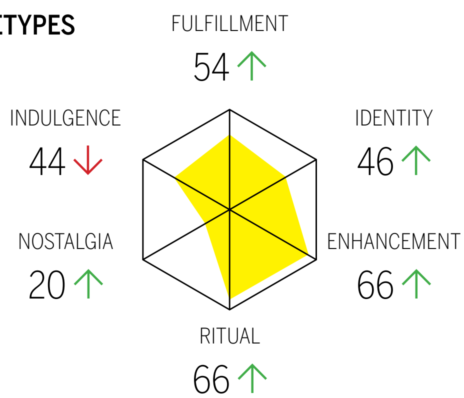
This year's rankings are the latest findings in eight years of research and analysis related to Brand Intimacy. This year's U.S. Top 10 Most Intimate Brands demonstrate the growing dominance of media & entertainment, emerging as the year's top industry and, along with apps & social platforms, linked to ritual and becoming habit forming. Apple, for the third year in a row, remains in first place, considerably ahead of all other brands and ranks #1 in our Mexico and UAE findings. As a technology & telecommunications brand, Apple and others in this category are strongly linked to enhancement, making users smarter and more connected. Amazon continues to climb, improving its rankings from last year's 3rd place, with retail being the top industry for women. The biggest rise comes from YouTube, moving from 25th place in 2017 to 6th. It ranks as the #3 brand for those ages 18-24.

U.S. Top 10 Most Intimate Brands 2018

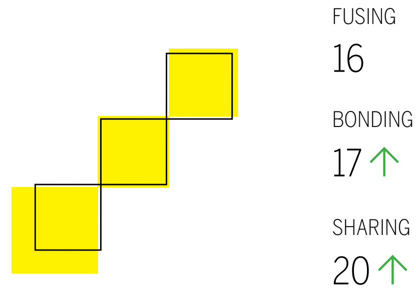
			Quotient
1			83.4
2	amazon	↑	66.5
3	BMW	↑	62.1
4	Jeep	↑	61.7
5	Disney	↓	60.5
6	YouTube	↑	58.8
7	TARGET	↑	58.6
8	NETFLIX	↓	57.2
9	WHOLE FOODS MARKET	↓	57.1
10	Google	↑	57.0

RANK	BRAND	QUOTIENT
1	Apple	83.4

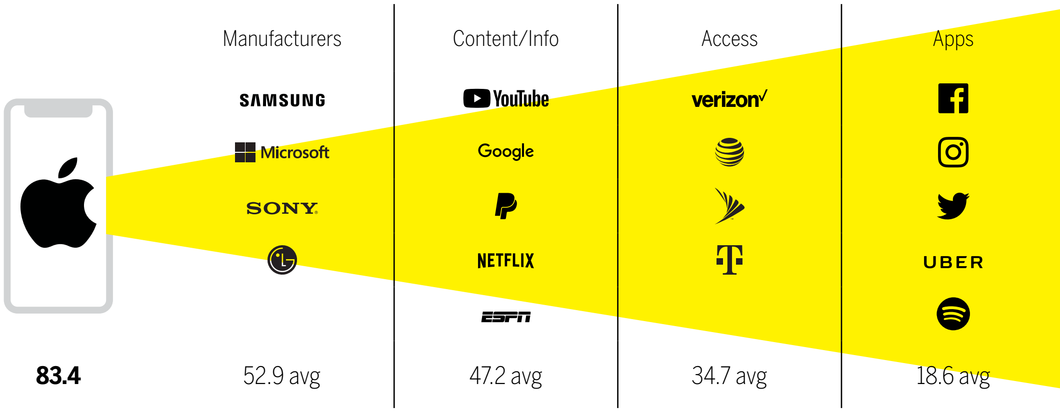
ARCHETYPES



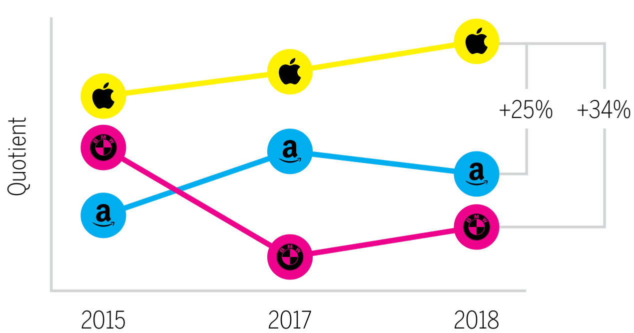
STAGES



Apple is king of the smartphone ecosystem



Apple's growing dominance vs. other leading brands



#1

- **OVERALL**
- among **AGES 18-64**
- among **MEN**
- among **WOMEN**


2
PROLOGUE
I had just come to accept that my life wou
be ordinary when extraordinary thin
began to happen. The first of these came
a terrible shock and, like anything that chang
you forever, split my life into halves: Before a
amazon
amazon
amazon

RANK

2

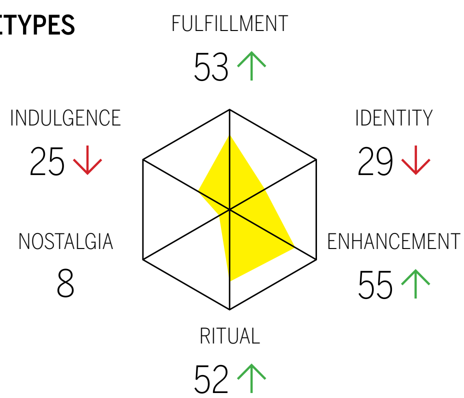
BRAND

amazon

QUOTIENT

66.5

ARCHETYPES



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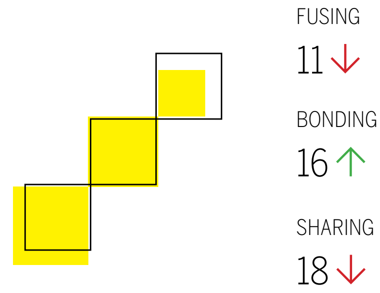
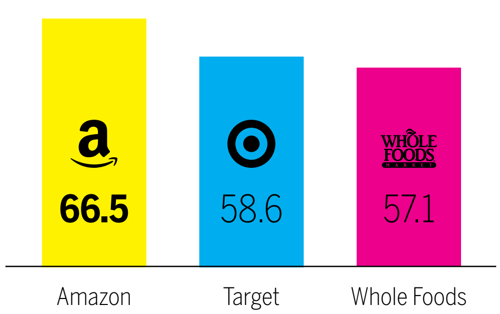
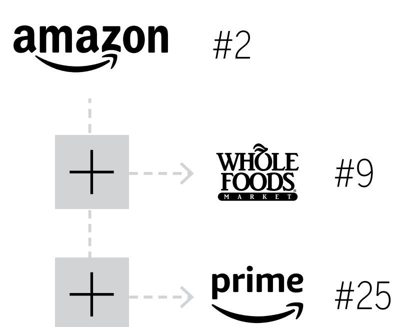


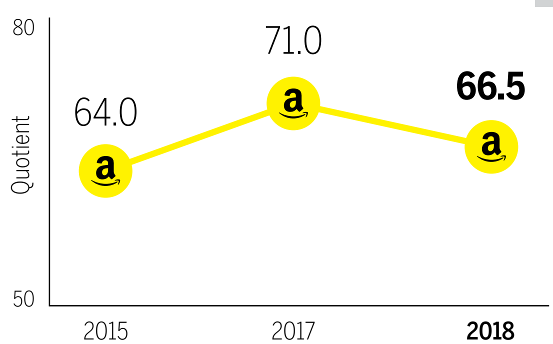
Brand intimacy in retail



Amazon's family of brands

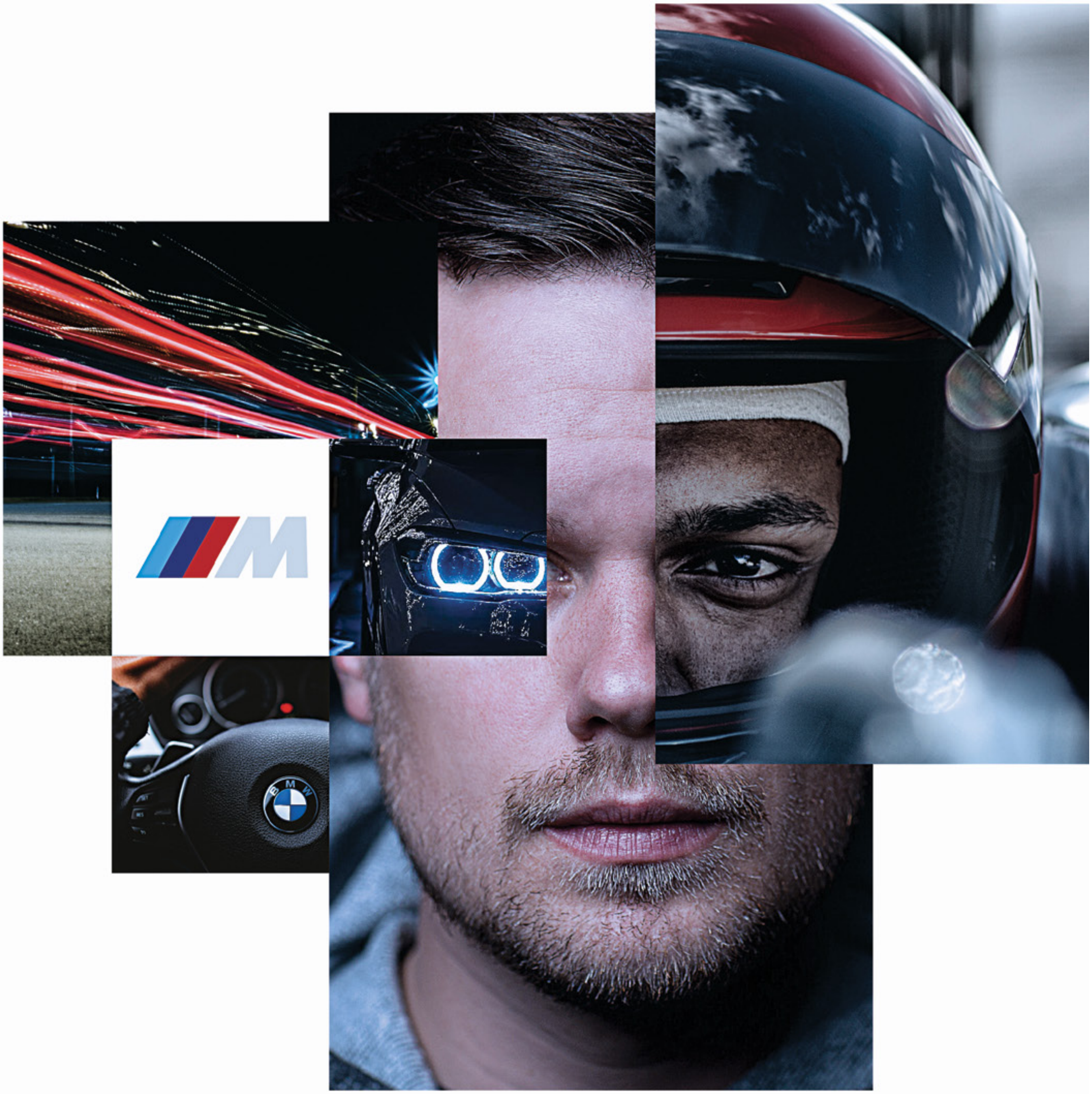


Performance over time



#1

Among users
AGES 35-44



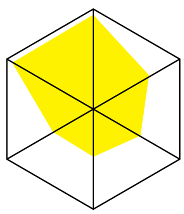
RANK	BRAND	QUOTIENT
3	BMW	62.1

ARCHETYPES

FULFILLMENT 58 ↑

INDULGENCE 57 ↑

IDENTITY 41 ↑

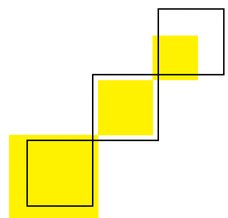


NOSTALGIA 29 ↑

ENHANCEMENT 35 ↑

RITUAL 30 ↑

STAGES

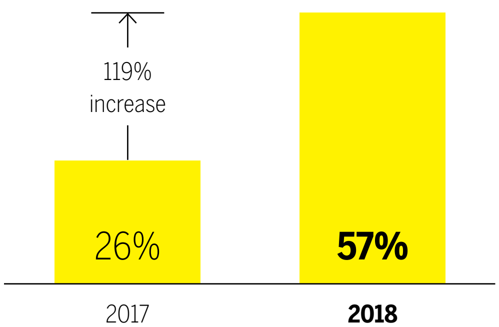


FUSING 10 ↑

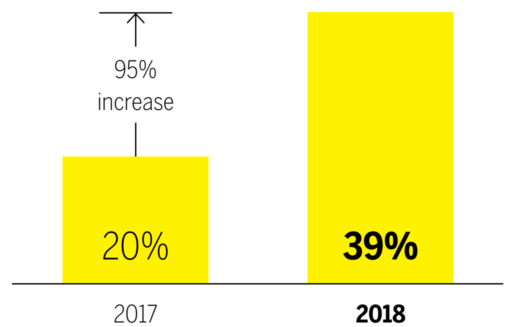
BONDING 13 ↑

SHARING 21 ↓

Net promoter score



Can’t live without



#3

Among **MEN**

#3

Among users **AGES 45-64**

RANK

4

BRAND

Jeep

QUOTIENT

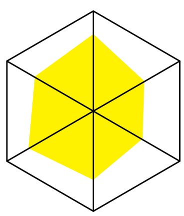
61.7

ARCHETYPES

FULFILLMENT 47 ↑

INDULGENCE 42 ↑

IDENTITY 36 ↑

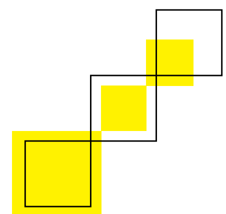


NOSTALGIA 46 ↑

ENHANCEMENT 34 ↑

RITUAL 42 ↑

STAGES



FUSING 11 ↑

BONDING 10

SHARING 21 ↓

Jeep ranks higher with **WOMEN** than men

♀ **#4**

#8 ♂

42%

Jeep customers in an **INTIMATE RELATIONSHIP** with the brand

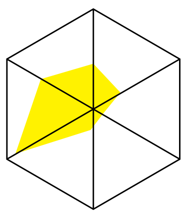
#2

For **FUSING**, the highest stage of intimacy


LASER

RANK	BRAND	QUOTIENT
5	Disney	60.5

ARCHETYPES



FULFILLMENT 36 ↓

INDULGENCE 49 ↓

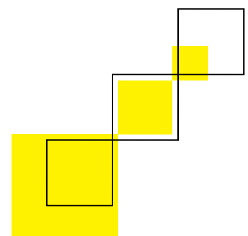
IDENTITY 27 ↓

NOSTALGIA 76 ↑

ENHANCEMENT 9 ↓

RITUAL 17 ↓

STAGES



FUSING 8 ↓

BONDING 13 ↓

SHARING 25 ↑

#1

For the **NOSTALGIA** archetype

#3

♂ #19

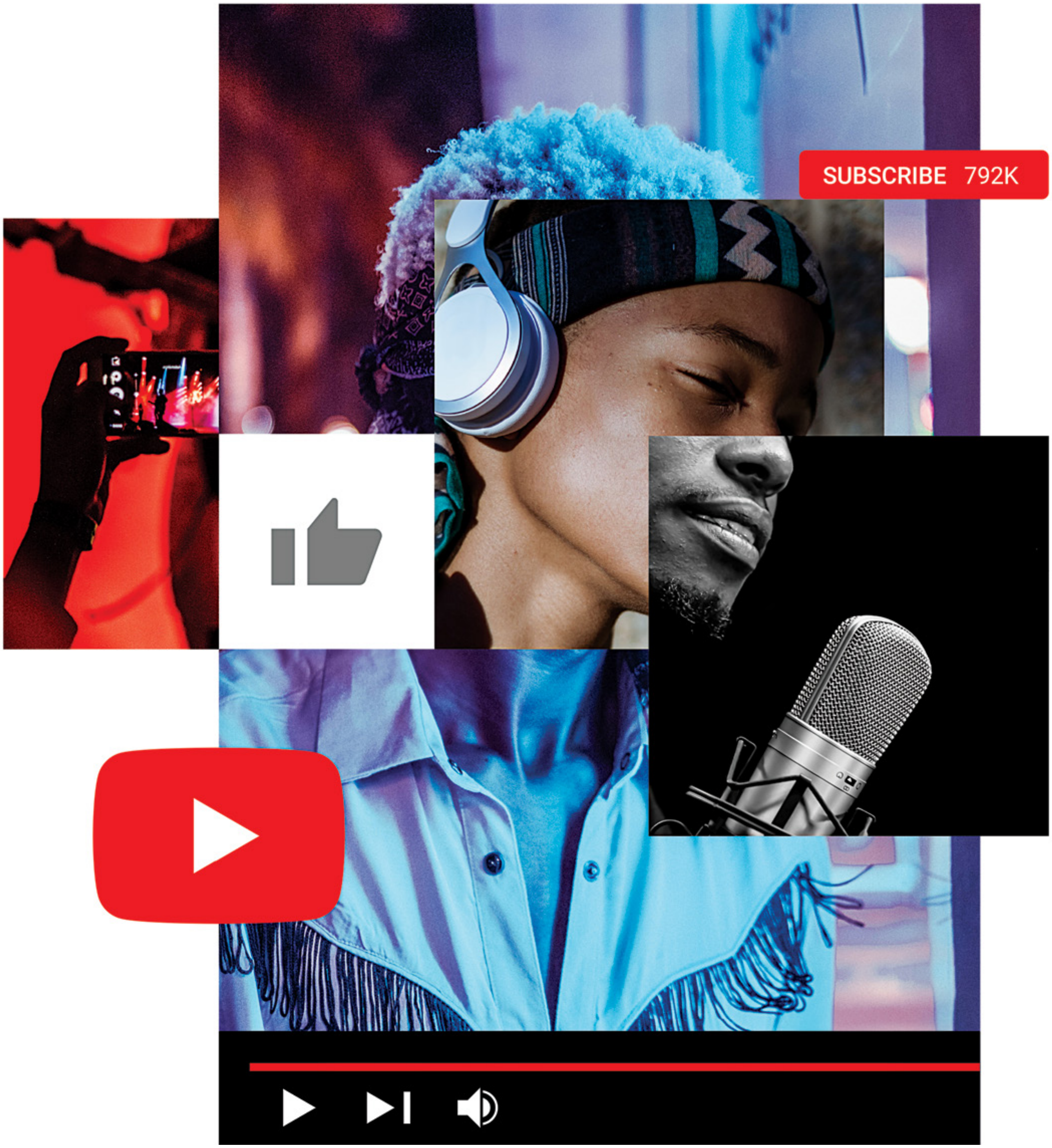
Disney ranks higher with **WOMEN** than men

Head to Head

Disney		YouTube
10%	Will pay +20%	8%
48%	NPS	58%
31%	Can't live without	39%
60.5	Quotient	58.8

#2

Among **MILLENNIALS** as their most intimate brand


SUBSCRIBE 792K

RANK

6

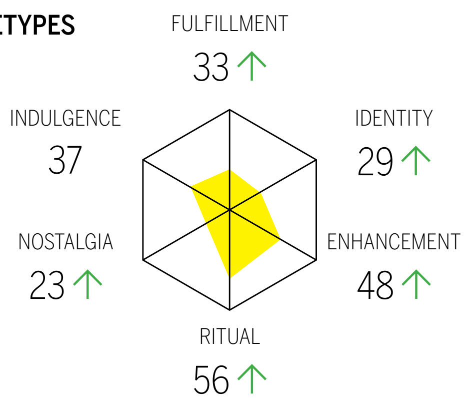
BRAND

YouTube

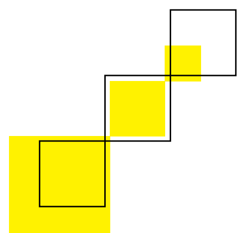
QUOTIENT

58.8

ARCHETYPES



STAGES



FUSING
8

BONDING
13

SHARING
24

#3

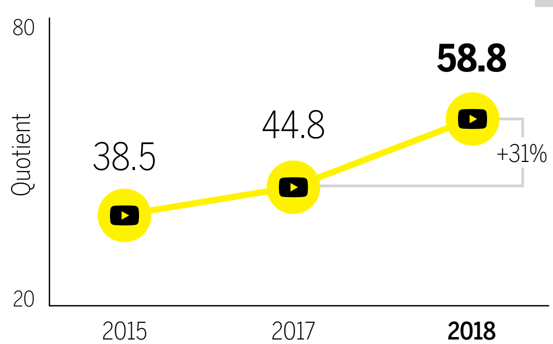
For the **RITUAL** archetype

YouTube + Google

YouTube #6

Google #10

Performance over time



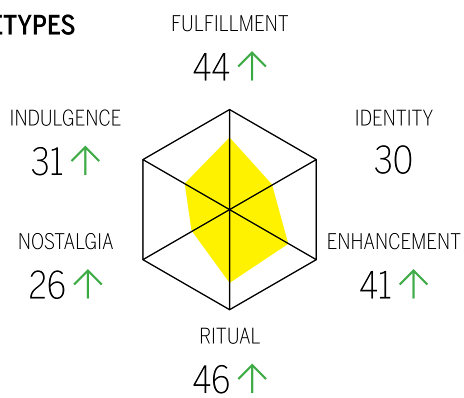
Daily usage is rising, especially among Gen Z

Age group	2017	**2018**
All ages	57%	66%
Gen Z	**72%**	**86%**

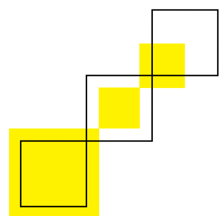

TARGET

RANK	BRAND	QUOTIENT
7	TARGET®	58.6

ARCHETYPES



STAGES



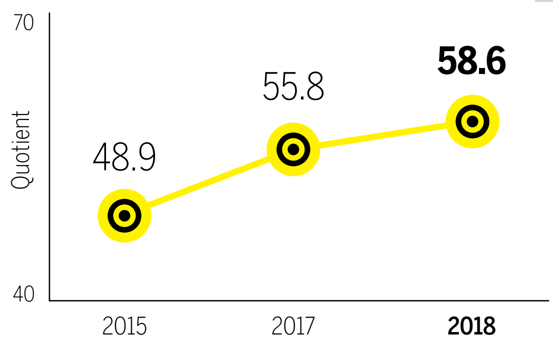
Improving with men

Ranked	Ranked
39th	**11th** ↑
2017	2018

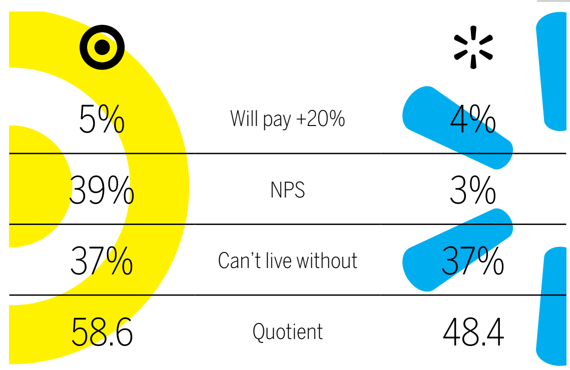
#1

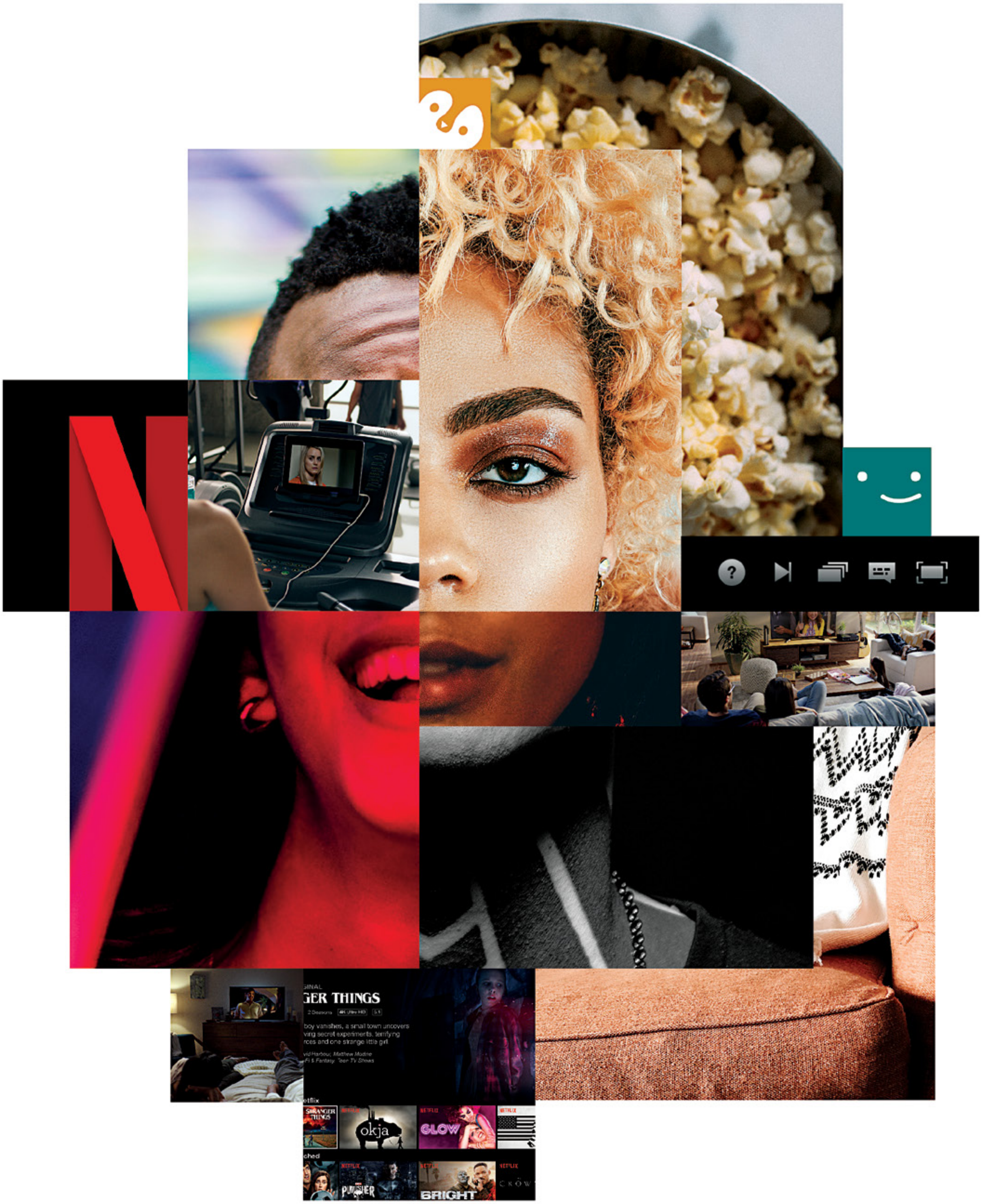
With incomes between **$75-$99K**

Performance over time



Head to Head




GER THINGS
okja
GLOW
BRIGHT

RANK

8

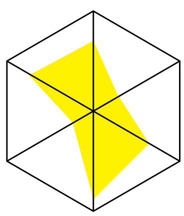
BRAND

NETFLIX

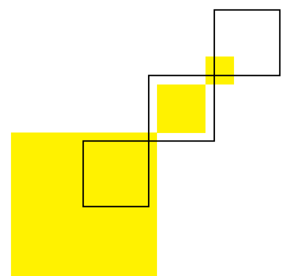
QUOTIENT

57.2

ARCHETYPES



STAGES



#4

For the **RITUAL** archetype

#2

With incomes between **$50-$75K**

51%

Netflix customers in an **INTIMATE RELATIONSHIP** with the brand

Stronger with older vs. younger users

Ages	Rank
25-34	13th
45-54	**5th**


COSTA RICA
ORGANIC
$4.99
WHOLE FOODS

RANK	BRAND	QUOTIENT
9	Whole Foods Market	57.1

ARCHETYPES

FULFILLMENT
41 ↓

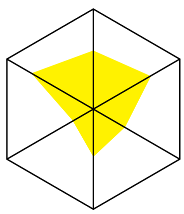
INDULGENCE
51 ↑

IDENTITY
47 ↑

NOSTALGIA
17 ↑

ENHANCEMENT
26 ↑

RITUAL
37 ↑



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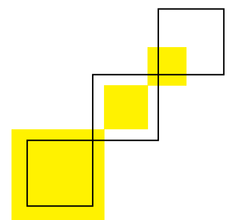


FUSING
9 ↓

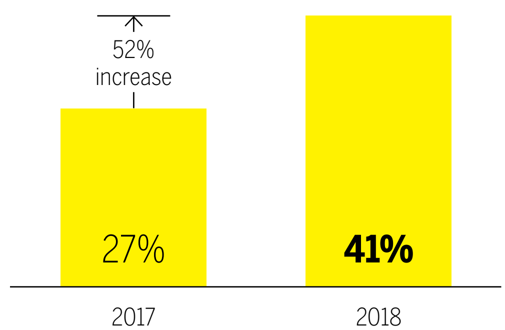
BONDING
10 ↑

SHARING
22 ↓

#1

For the **IDENTITY** archetype

Can't live without



Amazon's family of brands

amazon #2

Whole Foods #9

prime #25

Head to Head

Whole Foods		Costco
7%	Will pay +20%	7%
54%	NPS	46%
41%	Can't live without	37%
57.1	Quotient	28.6


Translate
Google Maps
analytics
ALL
IMAGES
NEWS

RANK

10

BRAND

Google

QUOTIENT

57.0

ARCHETYPES

FULFILLMENT 42 ↑

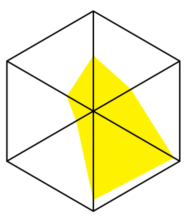
INDULGENCE 22 ↑

IDENTITY 32 ↑

NOSTALGIA 14

ENHANCEMENT 68 ↑

RITUAL 64 ↑



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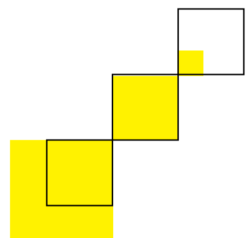


FUSING 6 ↓

BONDING 15 ↑

SHARING 24 ↓

#1

- for **CAN'T LIVE WITHOUT**
- for **DAILY USAGE**
- for the **ENHANCEMENT** archetype

#2

- for the **RITUAL** archetype
- among **MEN**

Across geographies

Ranked 10th	Ranked 6th	Ranked 12th

Google + YouTube

Google #10

YouTube #6

Demographics

Demographics offer us a lens to see how intimate relationships are impacted by gender, age and income. Women form more intimate brand relationships than men, with 23 percent of women in our survey having some form of intimacy with brands they use, compared to 22 percent for men.

Age reveals some consistencies, a remarkable sign for those brands that span generations. Income appears to demonstrate the biggest distinction, meaning the brands we connect with seem based on income, and are more different than the same.

Gender

Rank	Male	Female
1	Apple	Apple
2	Google	Amazon
3	BMW	Disney
4	YouTube	Jeep
5	Amazon	NETFLIX
Users experiencing intimacy	**22%**	23%

Interestingly, both women and men shared the same industries among their top 5 brands: technology & telecommunications, retail, entertainment and automotive. We've seen more movement in men's top brands, with Harley-Davidson, Nintendo and Chevrolet dropping from the top 5. For women, this year's top 5 only changes one brand from 2017: Target is out of the top 5 and Jeep is in.

Age

Rank	18-34	35-44	45-54
1	Apple	Amazon	Apple
2	Disney	Apple	Amazon
3	YouTube	PlayStation	Target
4	Target	Target	Disney
5	Amazon	WWE	NETFLIX

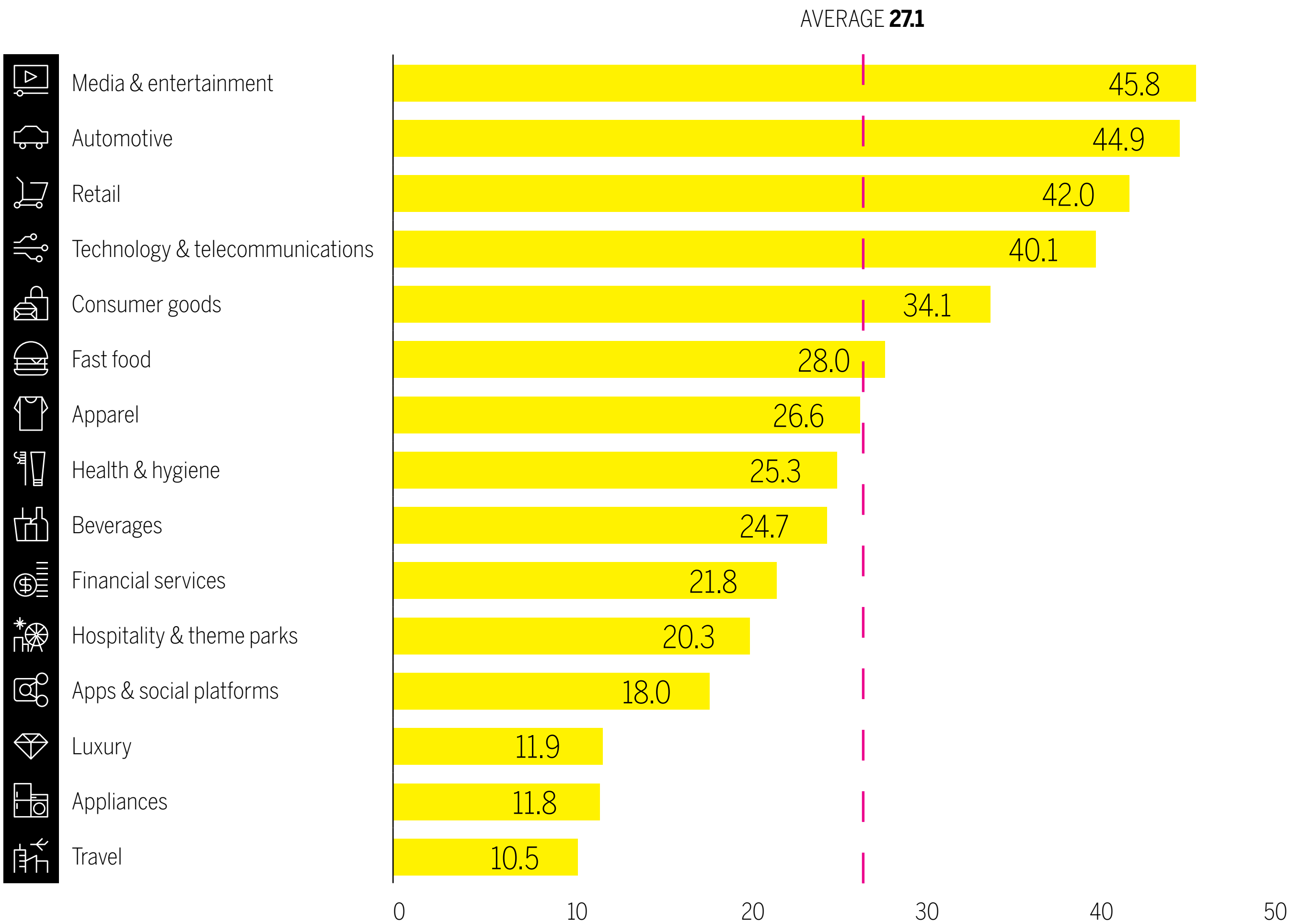
Apple, Amazon and Target build bonds across all age groups, a pretty impressive feat. Entertainment and retail, largely driven by the performance of Amazon, appear to be popular among both young and older consumers.

Income

Rank	$35-$50K	$100-$150K
1	Apple	Apple
2	Amazon	Amazon
3	Toyota	BMW
4	Coca-Cola	Disney
5	Starbucks	Target

Income demonstrates a varied intimate view, with only Apple and Amazon both intimate across income segments. Those making $50K or less seem more attached to food and beverage brands, while retail and media & entertainment appear more prominent in those with an income between $100-$150K. There is more movement and change in the $35-$50K income group compared with 2017, when Playstation, Samsung, Amazon, Microsoft and Netflix were in the top 5. Among those earning $100-$150K, the only brand change in the top 5 is BMW, replacing Ford.

Industries



Explore detailed industry findings as we release them over the year.

March
- **AUTOMOTIVE**

April
- **LUXURY**
- **APPS & SOCIAL PLATFORMS**
- **RETAIL**

May
- **TRAVEL**
- **MEDIA & ENTERTAINMENT**

June
- **CONSUMER GOODS**
- **HOSPITALITY & THEME PARKS**

July
- **TECH & TELECOMM**
- **FINANCIAL SERVICES**

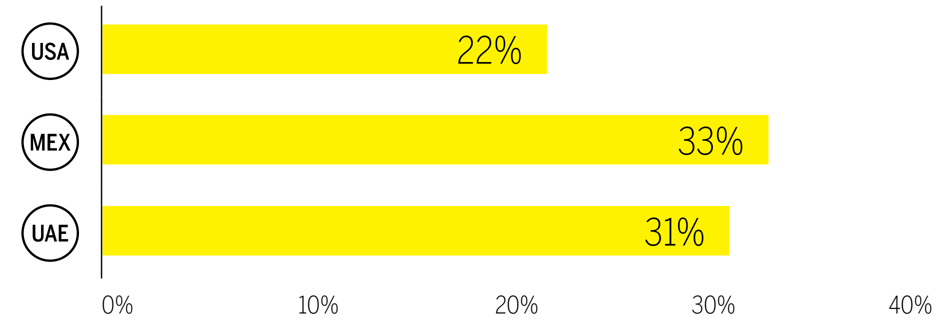
August
- **HEALTH & HYGIENE**

September
- **APPAREL**
- **APPLIANCES**

October
- **BEVERAGES**
- **FAST FOOD**

Countries

Consumers who are intimate with brands



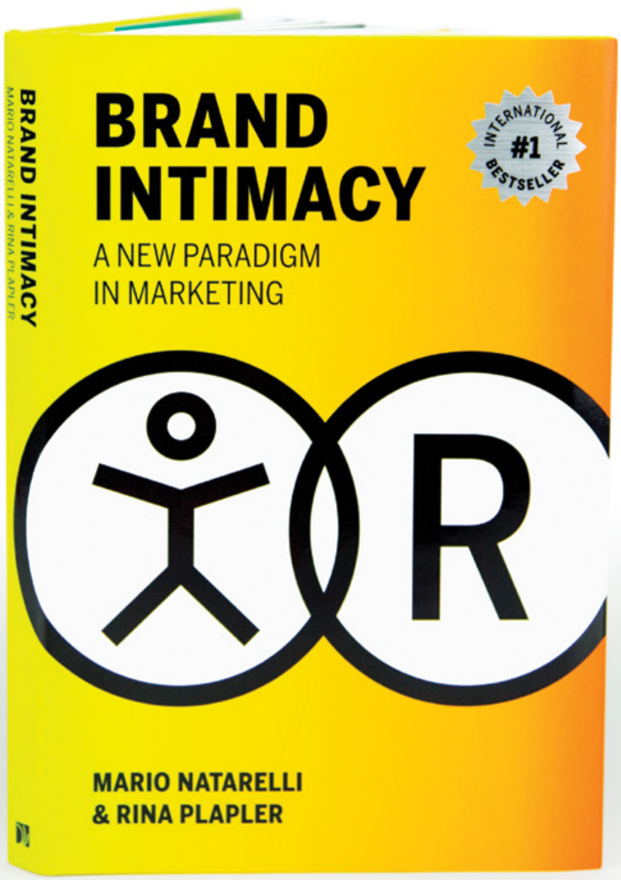
Top industries by country

Rank	USA	MEX	UAE
1	MEDIA & ENTERTAINMENT	TECHNOLOGY & TELECOMMUNICATIONS	AUTOMOTIVE
2	AUTOMOTIVE	FINANCIAL SERVICES	TECHNOLOGY & TELECOMMUNICATIONS
3	RETAIL	HEALTH & HYGIENE	CONSUMER GOODS

Interested in the perspectives of other countries? You can view findings from our U.S., Mexico or UAE reports to learn more about intimate brands in those markets.

Explore more on Brand Intimacy

A new paradigm in marketing



To learn more about Brand Intimacy, in both theory and practice, and how to measure, build and manage your own intimate brand, order a copy of our international bestseller.

EXPLORE

Assess your brand

Explore 10 key facets to shaping intimate brands and assessing your brand's potential for building bonds.

EXPLORE

Ways to build a more intimate brand

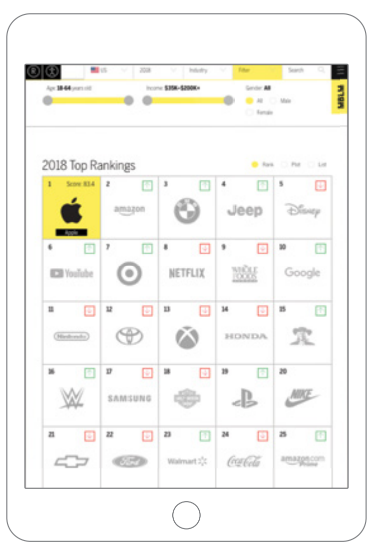
Consider a variety of key ways you can build an intimate brand and deploy it across your organization.

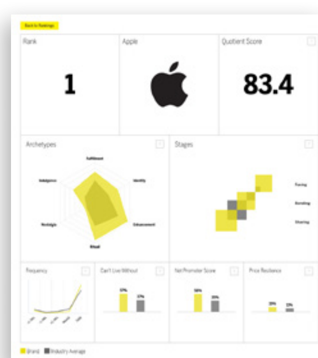
EXPLORE

Interactive ranking tool

Review the detailed performance of ranked brands and filter results by age, income and gender.

EXPLORE





METHODOLOGY

During 2017, MBLM with Praxis Research Partners conducted an online quantitative survey among 6,000 consumers in the U.S. (3,000), Mexico (2,000), and the United Arab Emirates (1,000). Participants were respondents who were screened for age (18 to 64 years of age) and annual household income ($35,000 or more) in the U.S. and socioeconomic levels in Mexico and the UAE (A, B and C socioeconomic levels). Quotas were established to ensure that the sample mirrored census data for age, gender, income/socioeconomic level, and region. The survey was designed primarily to understand the extent to which consumers have relationships with brands and the strength of those relationships from fairly detached to highly intimate. It is important to note that this research provides more than a mere ranking of brand performance and was specifically designed to provide prescriptive guidance to marketers. We modeled data from over 6,000 interviews and approximately 54,000 brand evaluations to quantify the mechanisms that drive intimacy. Through factor analysis, structural equation modeling, and other sophisticated analytic techniques, the research allows marketers to better understand which levers need to be pulled to build intimacy between their brand and consumers. Thus, marketers will understand not only where their brand falls in the hierarchy of performance but also how to strengthen performance in the future.

To read a more detailed description of our approach, visit our Methodology page.

ACKNOWLEDGMENTS

The Brand Intimacy Study is a comprehensive effort requiring collaboration among researchers, strategists, writers, designers, programmers and coordinators. MBLM would like to thank Mario Natarelli and Rina Plapler for directing, shaping and driving this new marketing paradigm every day and throughout each year. Without support from the other partners at MBLM, the study could not have been realized. Our thanks to Claude Salzberger, Eduardo Calderón, John Diefenbach, Sidney Blank, Amy Clausi, William Shintani, María Gabriela Pulido, Demetri Mihalakakos, David Clover, Kristiane Blomqvist and Juan Carlos Arias for their support and leadership.

A very special thanks to our dedicated, hardworking, multidisciplinary team whose brilliance brought the study to life: Lyutha Al-Habsy, Deyan Iolov, Kate Conrad, Vera Kasper, Will Biondi, Huimin Lee, Heitor Piffer, Frank Alcock, Tom Weick, Youcef Haouatis, Risa DiBiasi, Lourice Simeon, Rodrigo Diez, Cecilia Rodríguez, Melisa Agúndez, Santiago Espinosa, Ashwin Kulothungun, Marc Stevenson, Saneesh Sukesan, Sara Muslim and Ehab Almassrey.

SOURCES

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BRAND INTIMACY