USA

MBLM

BRAND INTIMACY STUDY **2019**

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Are you leveraging the science of emotion?

Brands matter. Emotion counts. Every year, we produce the largest study of brands based on emotion. The proprietary methodology we have developed over the past decade is based on 20,000 qualitative brand stories, 1,000 hours of insights, and more than 18,000 quantitative interviews and 156,000 brand evaluations. This year we examined how 6,200 consumers across three countries bond with the brands they use and love. We also showcased how brands based on emotion continue to outperform top brands in financial indices such as Fortune 500 and S&P, demonstrating the clear business advantages of leveraging emotional science.

This document features only the top 10 ranking brands, and from them we gain key insights or lessons on how they build successful bonds with their customers. By exploring our data dashboard, you can broaden your understanding of nearly 400 brands. If your brand is in our study, consider how you can deepen and enhance the character and intensity of its bonds with consumers. If your brand is not in our study, examine whether you are measuring and leveraging your brand's emotional power. We can be the partner to help you get there.

All brands have the potential to be intimate with their users. Are you doing everything possible to ensure your brand is building strong bonds?

Why Brand Intimacy?

Brand can be a key asset, helping facilitate demand, encourage growth, ensure consistency of users, and create advantage. Although the world around us has changed dramatically and shaped the way we consume, buy, and sell, approaches to marketing and brand building have largely stagnated. Most feature models and structures from decades ago that tend to focus on the importance of rational, hierarchal thinking and create constructs designed to mimic a deliberate decision-making process.

With advances in behavioral science and neuroscience, we now understand that humans process information and make decisions based on emotion. This suggests that to influence and affect decision-making, you have to appeal and connect to people's emotions. We focus on decoding this emotional science to build strong brands.

Advantages

- Provides greater price resilience
- Centers on emotion, which drives decision and willingness to purchase
- Creates strong sense of loyalty
- Is customer-centric and based on reciprocity
- Leverages technology to establish an ecosystem for building bonds

Price Resilience

We continue to see that consumers are more willing to pay a premium for highly intimate brands than they are for brands with lower levels of intimacy.

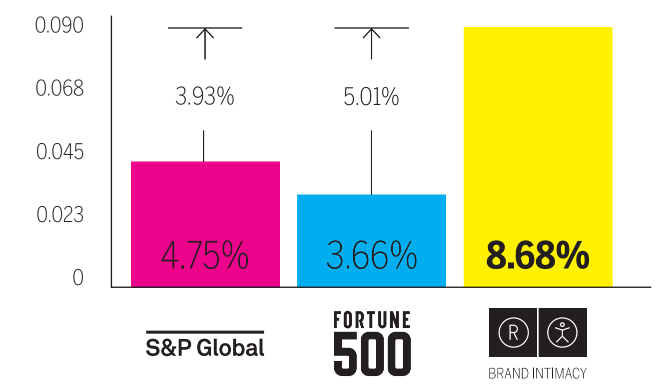
Top intimate brands have double the number of consumers willing to pay 20 percent more

Outperforming leading financial indices

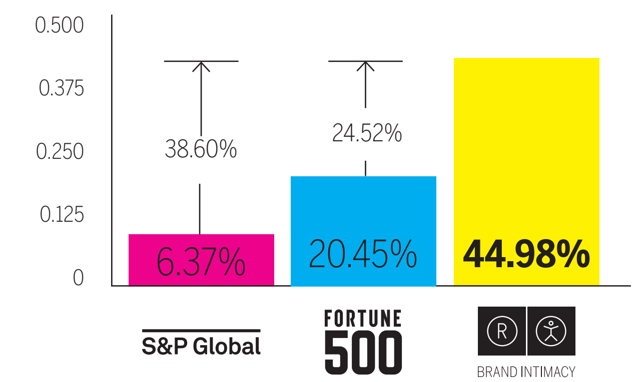
As has been the case over the past 10 years, intimate brands continue to outperform established financial indices for both revenue and profit.

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 2008–2017 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 in relation to revenue and profit growth, suggesting the importance of emotion in driving the world's leading brands.

Average revenue growth 2008–2017



Average profit growth 2008–2017



U.S. Rankings

This year's rankings are the latest findings in nearly a decade of research and analysis related to Brand Intimacy. In last year's U.S. Top 10 Most Intimate Brands, we saw the growing dominance of media & entertainment, and that trend continues in 2019. After three years of leading our study, Apple has been dethroned by Disney, and the top 10 has become increasingly saturated with media & entertainment brands (four out of ten, up from three last year). Automotive has also increased its presence at the top of the rankings. Although it has slid from its #2 spot last year, Amazon maintains a strong position in the rankings. We also have a fast-rising new entrant in fast food brand Chick-fil-A.

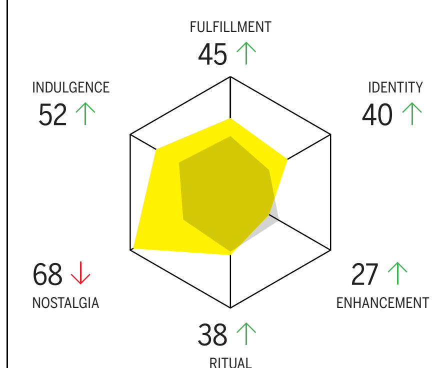
U.S. Top 10 Most Intimate Brands 2019

		Quotient	
1	Disney	77.9	↑
2	Apple	70.9	↓
3	amazon	69.8	↓
4	CHEVROLET	62.5	↑
5	NETFLIX	61.4	↑
6	HARLEY-DAVIDSON MOTOR COMPANY	58.4	↑
7	PlayStation	57.7	↑
8	YouTube	56.2	↓
9	Ford	54.8	↑
10	Chick-fil-A	54.7	↑

Brand Industry Average

BRAND	RANK	INDUSTRY RANK
Disney	1	1

ARCHETYPES



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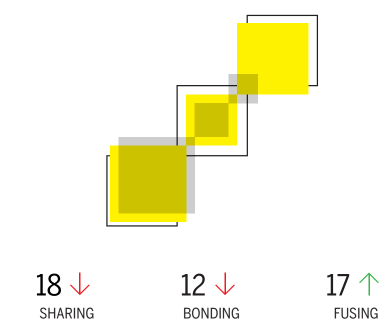


QUOTIENT

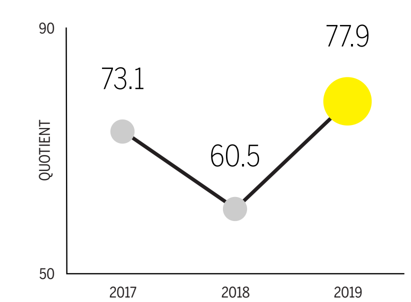
77.9

CAN'T LIVE WITHOUT

26%

OF DISNEY USERS **CAN'T LIVE WITHOUT** THE BRAND

PERFORMANCE OVER TIME



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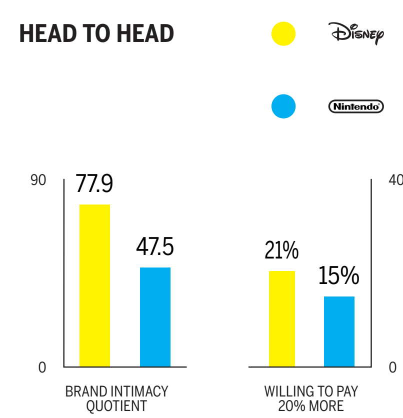


Brand   Industry Average

BRAND

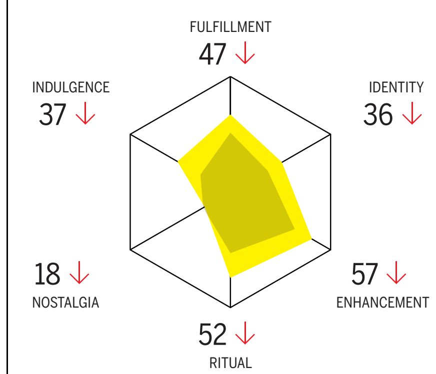
RANK

2

INDUSTRY RANK

1

ARCHETYPES



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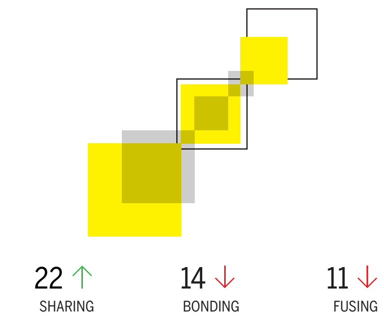


QUOTIENT

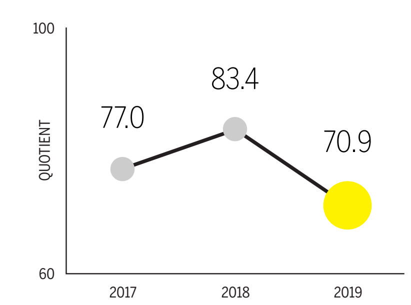
70.9

CAN'T LIVE WITHOUT

38%

OF APPLE USERS **CAN'T LIVE WITHOUT** THE BRAND

PERFORMANCE OVER TIME



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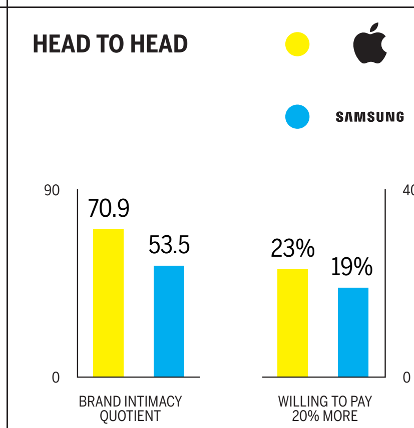


BRAND INTIMACY **2019**

Brand
Industry Average

BRAND

amazon

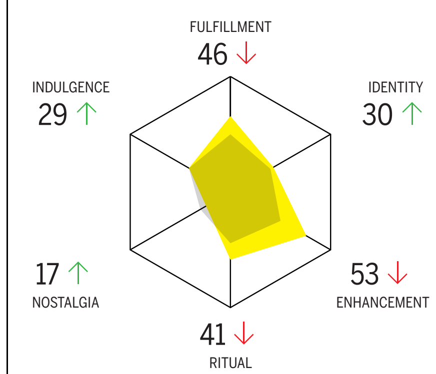
RANK

3

INDUSTRY RANK

1

ARCHETYPES



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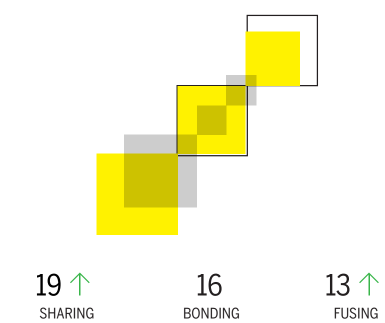


QUOTIENT

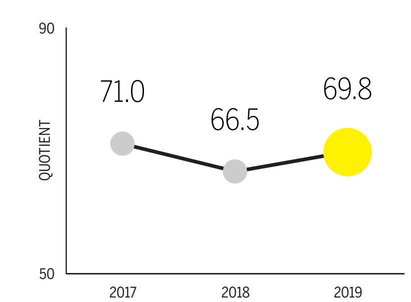
69.8

CAN'T LIVE WITHOUT

32%

OF AMAZON USERS **CAN'T LIVE WITHOUT** THE BRAND

PERFORMANCE OVER TIME



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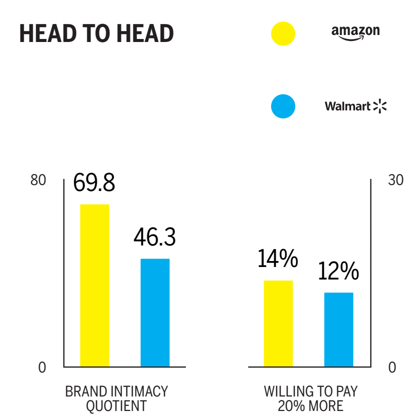
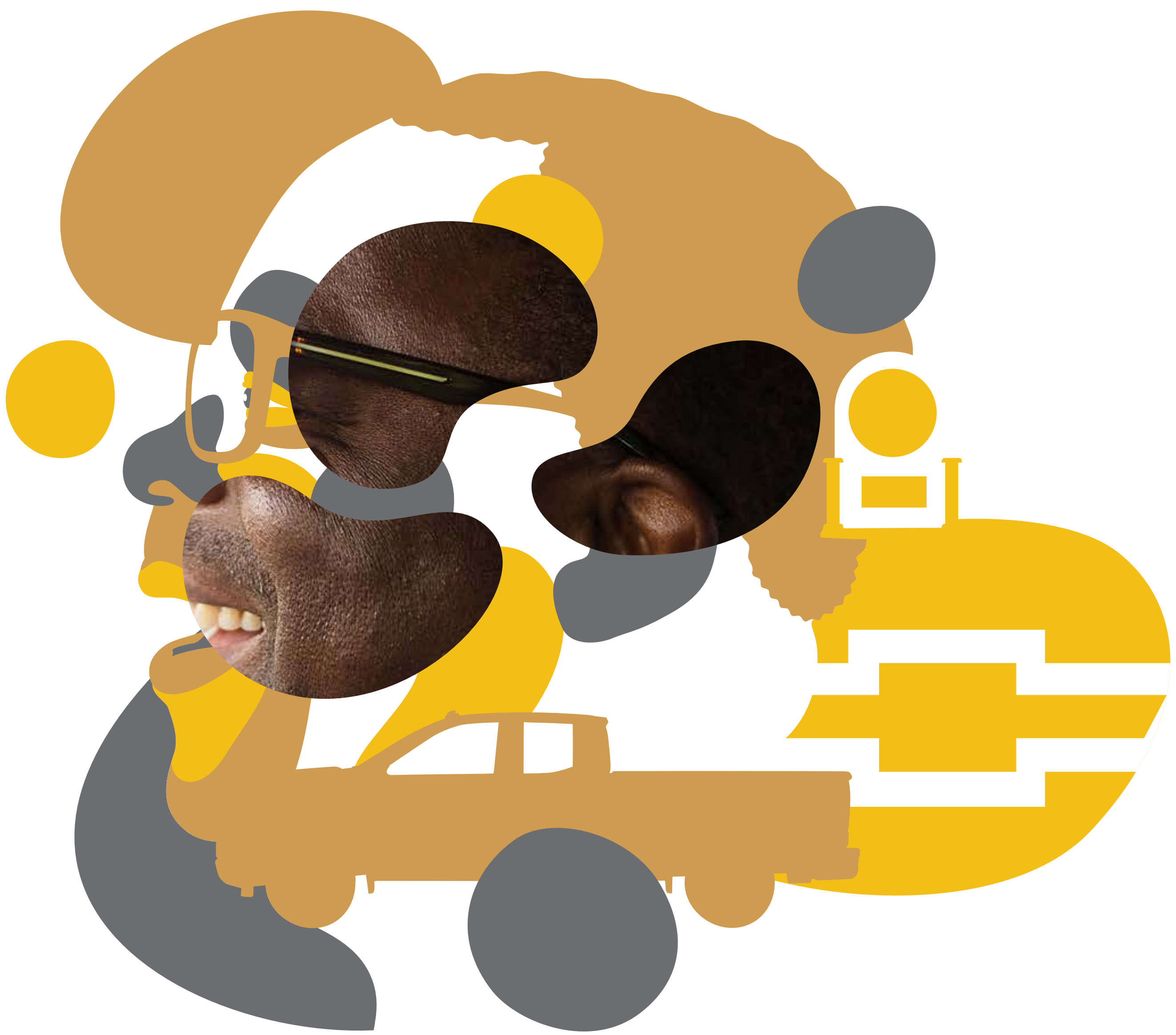




Brand Industry Average

BRAND

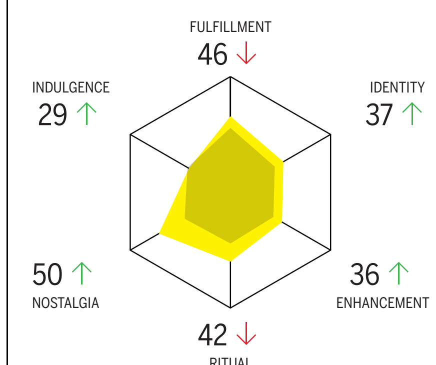
RANK

4

INDUSTRY RANK

1

ARCHETYPES



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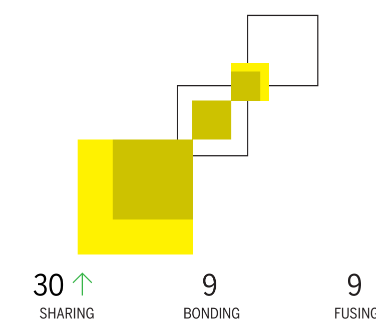


QUOTIENT

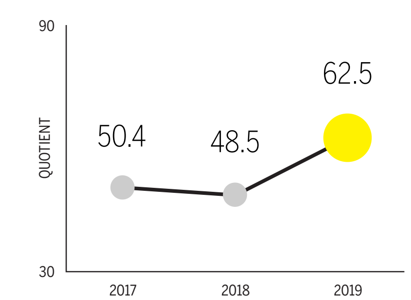
62.5

CAN'T LIVE WITHOUT

22%

OF CHEVROLET USERS **CAN'T LIVE WITHOUT** THE BRAND

PERFORMANCE OVER TIME



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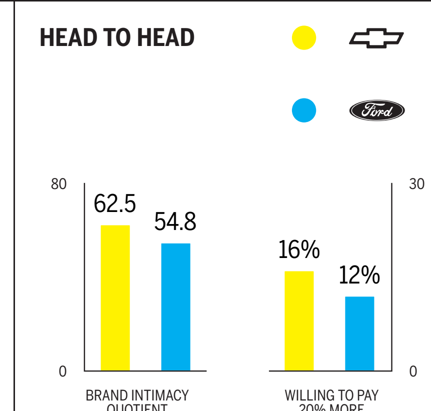


Brand | Industry Average

BRAND

NETFLIX

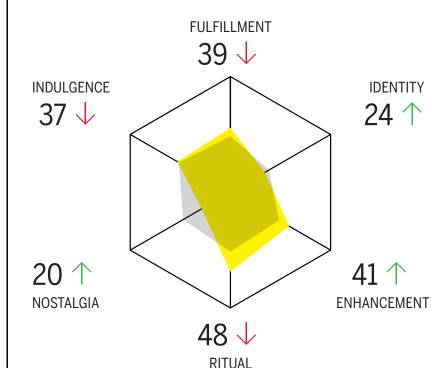
RANK

5

INDUSTRY RANK

3

ARCHETYPES



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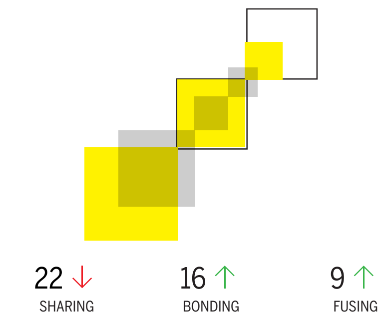


QUOTIENT

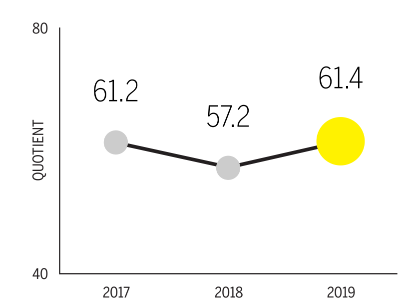
61.4

CAN'T LIVE WITHOUT

27%

OF NETFLIX USERS **CAN'T LIVE WITHOUT** THE BRAND

PERFORMANCE OVER TIME



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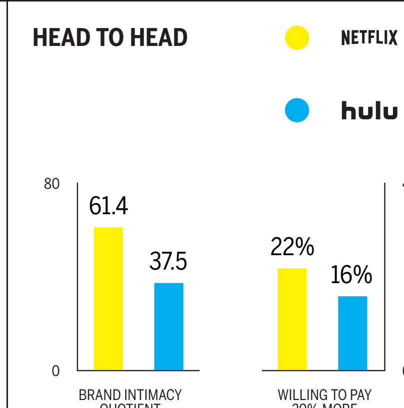


Brand | Industry Average

BRAND

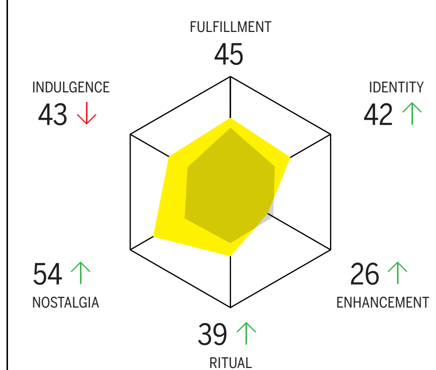
RANK

6

INDUSTRY RANK

2

ARCHETYPES



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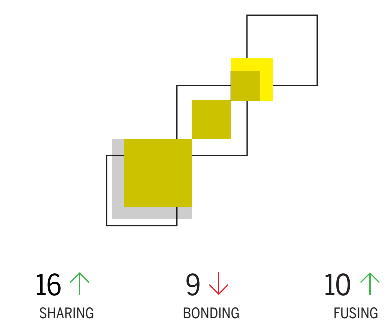


QUOTIENT

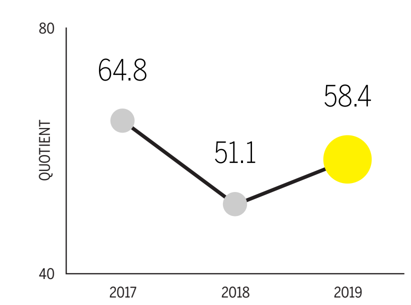
58.4

CAN'T LIVE WITHOUT

21%

OF HARLEY-DAVIDSON USERS **CAN'T LIVE WITHOUT** THE BRAND

PERFORMANCE OVER TIME



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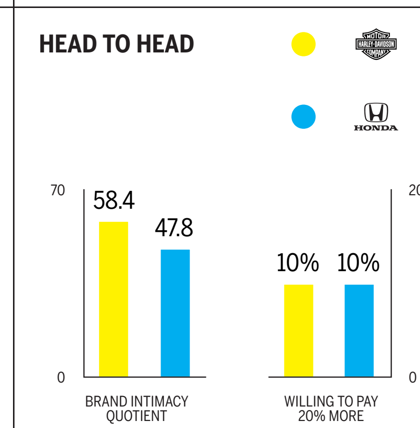


Brand | Industry Average

BRAND

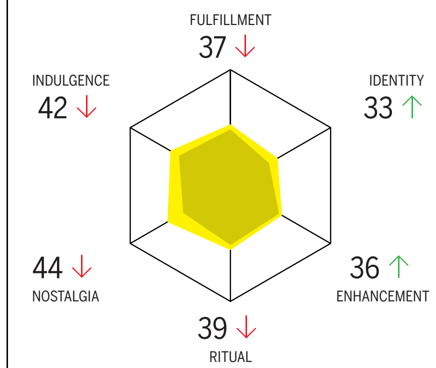
RANK

7

INDUSTRY RANK

4

ARCHETYPES



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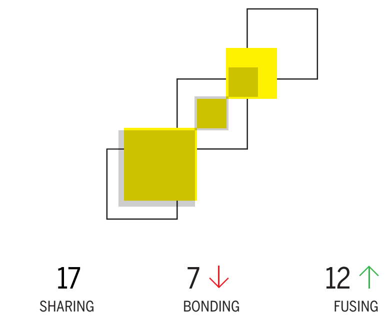


QUOTIENT

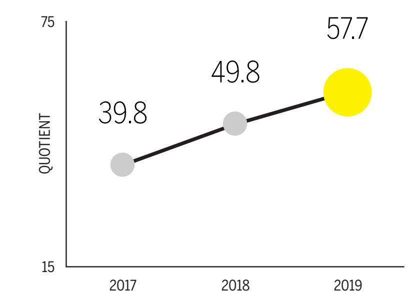
57.7

CAN'T LIVE WITHOUT

28%

OF PLAYSTATION USERS **CAN'T LIVE WITHOUT** THE BRAND

PERFORMANCE OVER TIME



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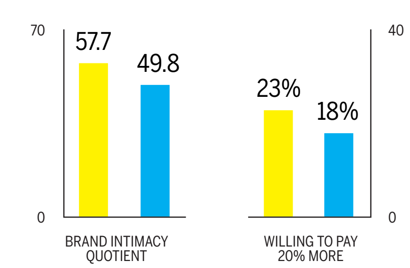
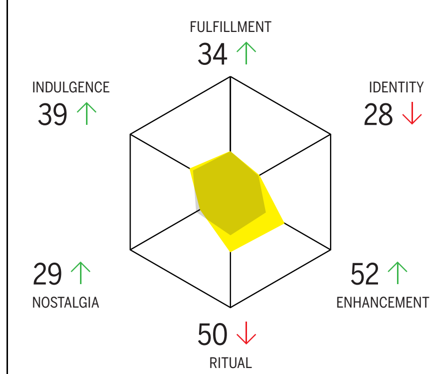


Brand Industry Average

BRAND	RANK	INDUSTRY RANK
YouTube	8	5

ARCHETYPES



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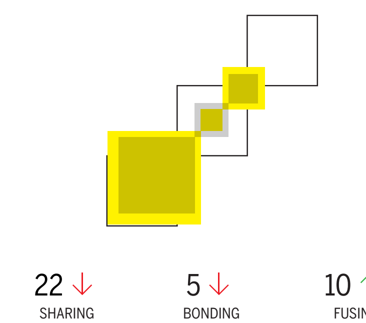


QUOTIENT

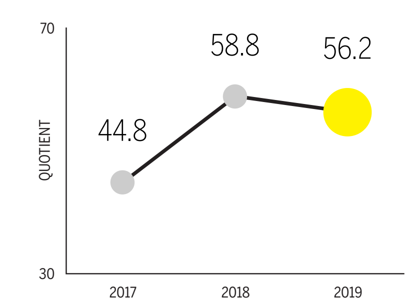
56.2

CAN'T LIVE WITHOUT

28%

OF YOUTUBE USERS **CAN'T LIVE WITHOUT** THE BRAND

PERFORMANCE OVER TIME



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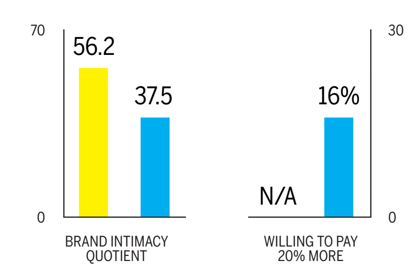
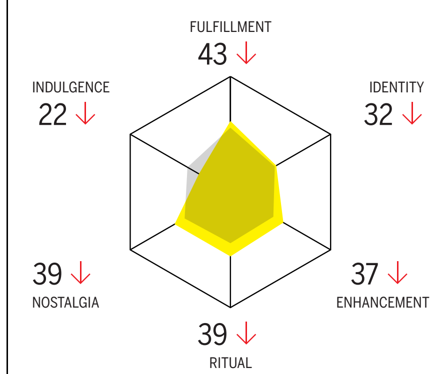
YouTube
hulu



Brand | Industry Average

BRAND	RANK	INDUSTRY RANK
Ford	9	3

ARCHETYPES



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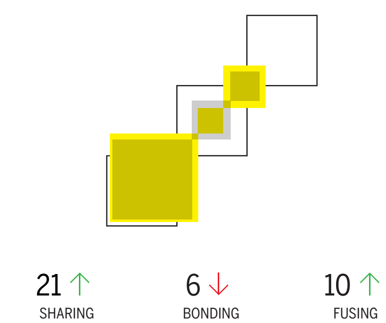


QUOTIENT

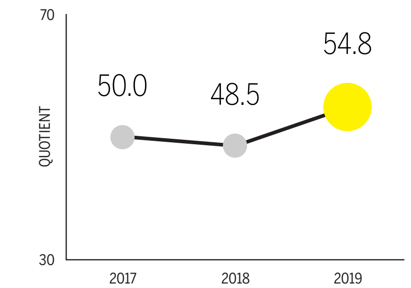
54.8

CAN'T LIVE WITHOUT

21%

OF FORD USERS **CAN'T LIVE WITHOUT** THE BRAND

PERFORMANCE OVER TIME



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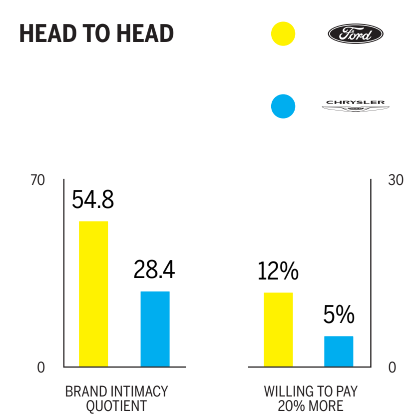


Brand Industry Average

BRAND

Chick-fil-A

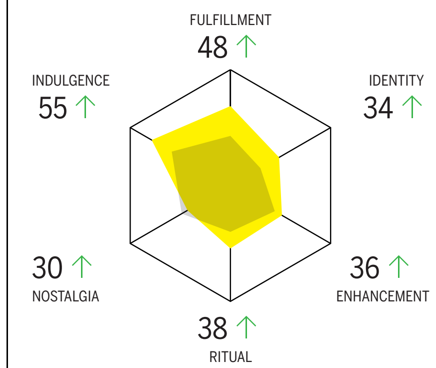
RANK

10

INDUSTRY RANK

1

ARCHETYPES



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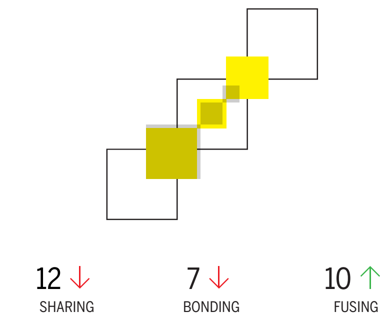


QUOTIENT

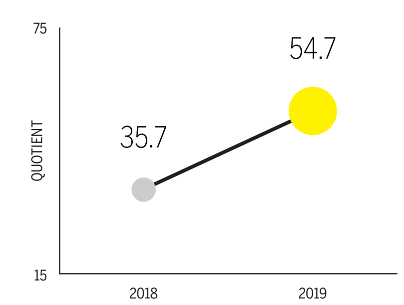
54.7

CAN'T LIVE WITHOUT

24%

OF CHICK-FIL-A USERS **CAN'T LIVE WITHOUT** THE BRAND

PERFORMANCE OVER TIME



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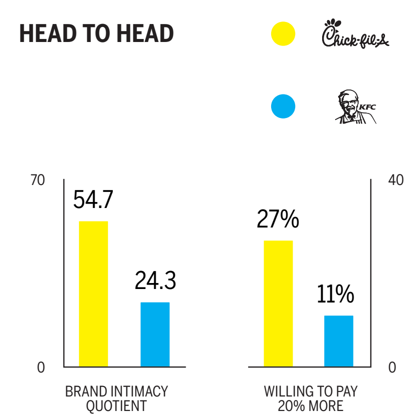


Demographics

GENDER

Rank	Male	Female
1	Disney	Amazon
2	Apple	Disney
3	Chevrolet	Apple
4	YouTube	NETFLIX
5	WHOLE FOODS MARKET	Chick-fil-A
Users experiencing intimacy	23%	23%

Interestingly, women and men share many of the same industries among their top five brands: each group includes two media & entertainment brands, one technology & telecommunications brand, and one retail brand. We've seen more movement in men's top brands, with Google, BMW, and Amazon dropping from the top five, and Disney catapulting from the #19 spot in 2018 to #1 this year. The women's top five includes almost all the same brands it did last year, with the exception of Chick-fil-A replacing Jeep.

AGE

Rank	18–34	35–54	55–64
1	YouTube	Amazon	Amazon
2	Apple	Apple	Quaker
3	NETFLIX	Disney	Ford
4	Disney	Chick-fil-A	HERSHEY'S
5	NIKE	NETFLIX	ebay

No one brand appears in the top five for all three age groups. Apple and Disney build strong bonds with users under 55, whereas Amazon has more success with older users. It's also worth noting that millennials and users aged 35–54 are more intimate with media & entertainment brands, whereas older consumers don't have any brands from this category in their top five.

INCOME

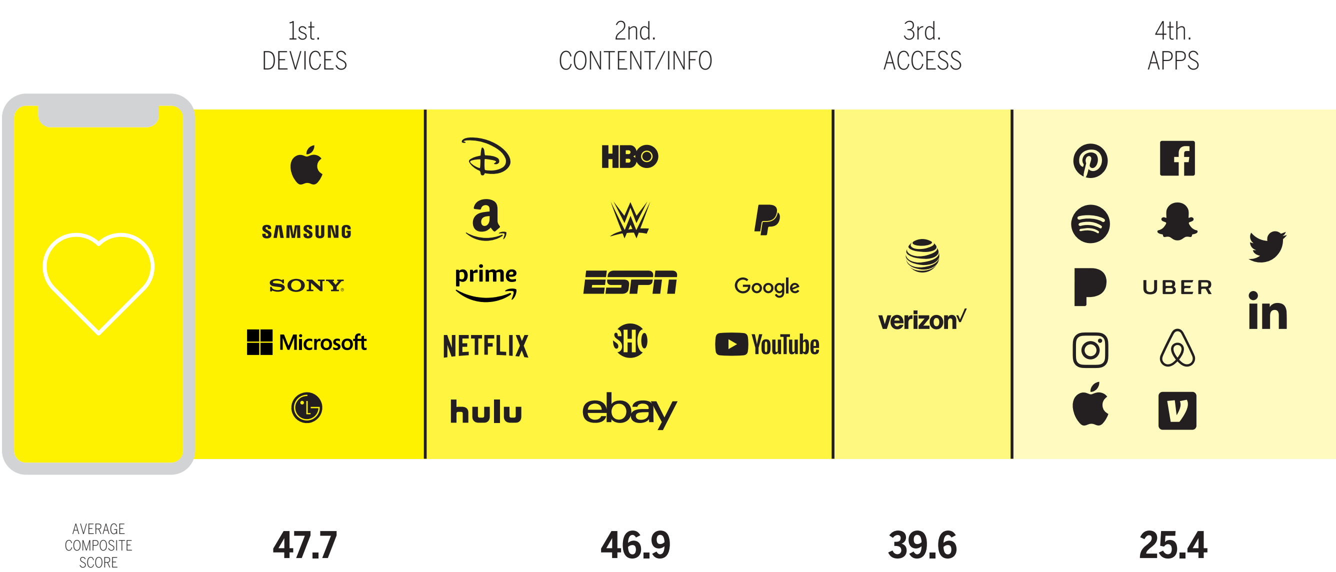
Rank	\$35–\$100K	\$100–\$200K
1	Amazon	Apple
2	Apple	WHOLE FOODS MARKET
3	Disney	COSTCO WHOLESALE
4	NETFLIX	Microsoft
5	Chevrolet	Honda

Income demonstrates a varied view of intimacy, with only Apple making it in the top five of both groups shown here. Those making under \$100K seem more attached to media & entertainment brands, whereas those with higher incomes prefer brands from the technology & telecommunications and retail industries.

The smartphone ecosystem

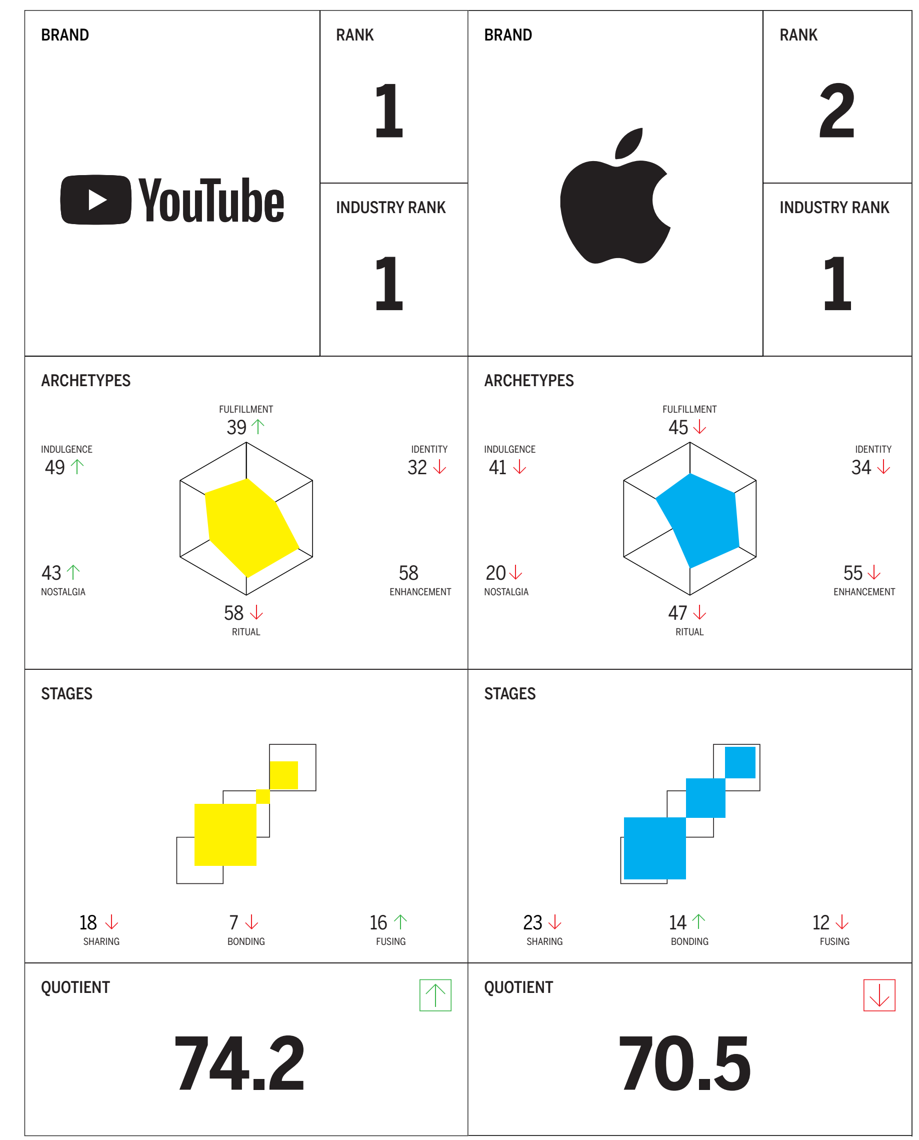
Over the past several years, we've noticed a Brand Intimacy insight that centers on possibly the most intimate device of the 21st century so far: the smartphone. We've found that brands that are a part of the smartphone ecosystem generally outperform those that aren't. The average Brand Intimacy Quotient for those in the ecosystem is 38.8, which is significantly higher than the overall study average (31.0). This suggests that if a brand has a strong presence on these devices, it can expand its capacity for fostering emotional connections with users.

The smartphone ecosystem is divided into four groups: apps, access, content/info services, and devices. The last two groups (content/info services and devices) tend to have higher Brand Intimacy averages than the first two. This is likely because access brands and apps can easily be seen as utilities or built-in aspects of the smartphone experience. Although these brands enable and enhance the smartphone experience, they can get less credit than they deserve, whereas the devices themselves become the ultimate targets of the users' affection.

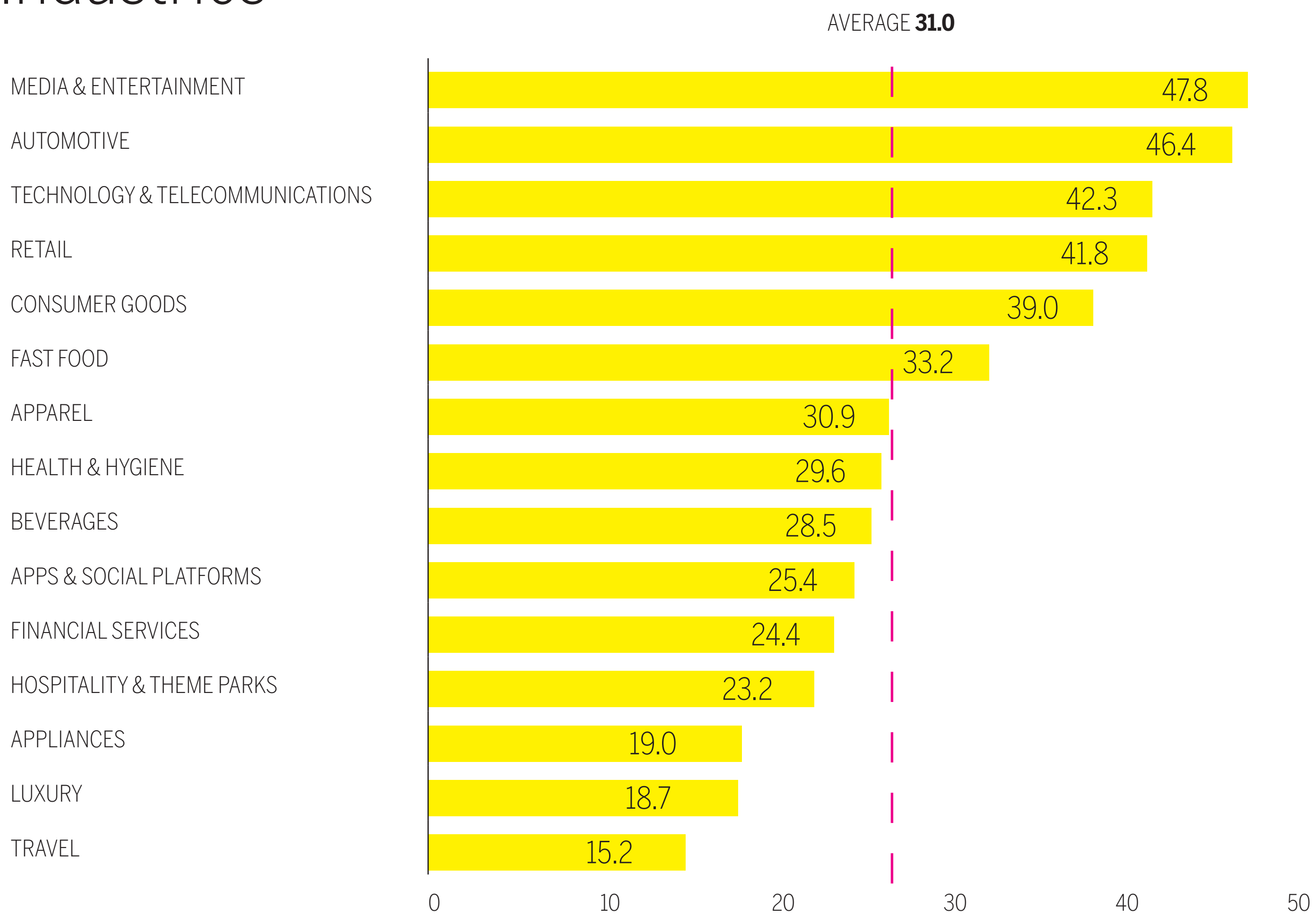


Millennial findings

YouTube and Apple are the top two brands among millennials. The two brands, although quite different from each other, have similar Brand Intimacy profiles among this age group: they share the same top archetypes (enhancement and ritual), and they both have the highest percentage of their users in the sharing stage, although YouTube distinguishes itself with an impressive 16 percent in the fusing stage. It's worth noting that YouTube scores much higher among millennials than it does with consumers overall (74.2 vs. 56.2), whereas Apple's score among millennials is relatively consistent with its overall average (70.5 vs. 70.9).



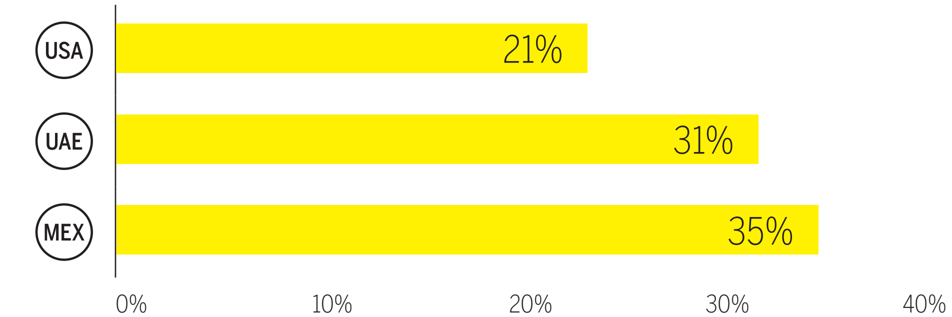
Industries



EXPLORE DETAILED INDUSTRY FINDINGS AS WE RELEASE THEM OVER THE YEAR

Global findings

CONSUMERS WHO ARE INTIMATE WITH BRANDS



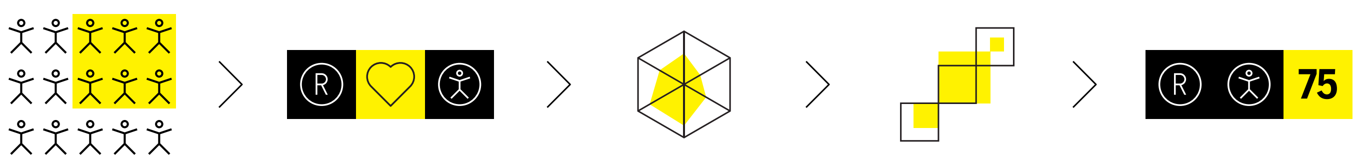
Overall percentages of intimate users across the three countries of our study show that the United States has significantly lower levels of Brand Intimacy than those of the UAE and Mexico, and that gap has increased since last year. The UAE's percentage of intimate consumers is the same as last year's, whereas Mexico's has increased from 33 percent to 35 percent.

TOP INDUSTRIES BY COUNTRY

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

The Brand Intimacy Model

Nearly a decade of research has helped determine our Brand Intimacy Model, which comprises five key components that contribute toward building intimate brand relationships. The model culminates in a Brand Intimacy Quotient, which is a score each brand receives that indicates its performance.



I. USER | **II. STRONG EMOTIONAL CONNECTION** | **III. ARCHETYPES** | **IV. STAGES** | **V. BRAND INTIMACY QUOTIENT**

I. USER

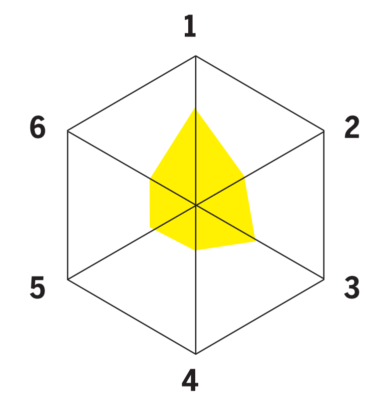
The user is the first part in our model because you cannot be intimate with a brand you have not engaged with or repeatedly tried. Think of this as similar to human relationships; you cannot be intimate with someone you are not already involved with.

II. STRONG EMOTIONAL CONNECTION

A strong emotional connection is a key requirement and the foundation of intimacy. The greater the emotional connection between a brand and a consumer, the more powerful the relationship. This connection is determined by the degree of overall positive feelings a user has toward a brand and the extent to which a person associates the brand with key attributes.

III. ARCHETYPES

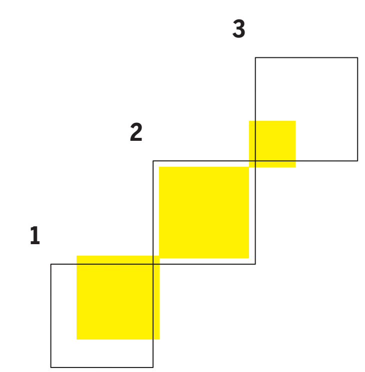
The following six patterns or markers are consistently present among intimate brands. They identify the character and nature of ultimate brand relationships and help determine their strength.



1. FULFILLMENT	Exceeds expectations, delivering superior service, quality, and efficacy.
2. IDENTITY	Reflects an aspirational image or admired values and beliefs that resonate deeply.
3. ENHANCEMENT	Customers become better through use of the brand—smarter, more capable, and more connected.
4. RITUAL	When a person ingrains a brand into his or her daily actions. It is more than just habitual behavior. It becomes a vitally important part of daily existence.
5. NOSTALGIA	Focuses on memories of the past and the warm feelings associated with them. These are often brands a customer has grown up with.
6. INDULGENCE	Creates a close relationship centered around moments of pampering and gratification that can be occasional or frequent.

IV. STAGES

Stages reveal and measure the depth and degree of intensity of an intimate brand relationship.



1. SHARING

When the person and the brand engage and interact. There is knowledge being shared, and the person is informed about what the brand is all about, and vice versa. At this stage, attraction occurs through reciprocity and assurance. Should the relationship advance, it would evolve to bonding. Should it decline, it would likely cause disengagement fueled by indifference.

2. BONDING

When an attachment is created and the relationship between a person and a brand becomes more significant and committed. This is a stage of acceptance and the establishment of trust. Should this stage advance, it would move to fusing.

3. FUSING

When a person and a brand are inexorably linked and co-identified. In this stage, the identities of the person and the brand begin to merge and become a form of mutual realization and expression.

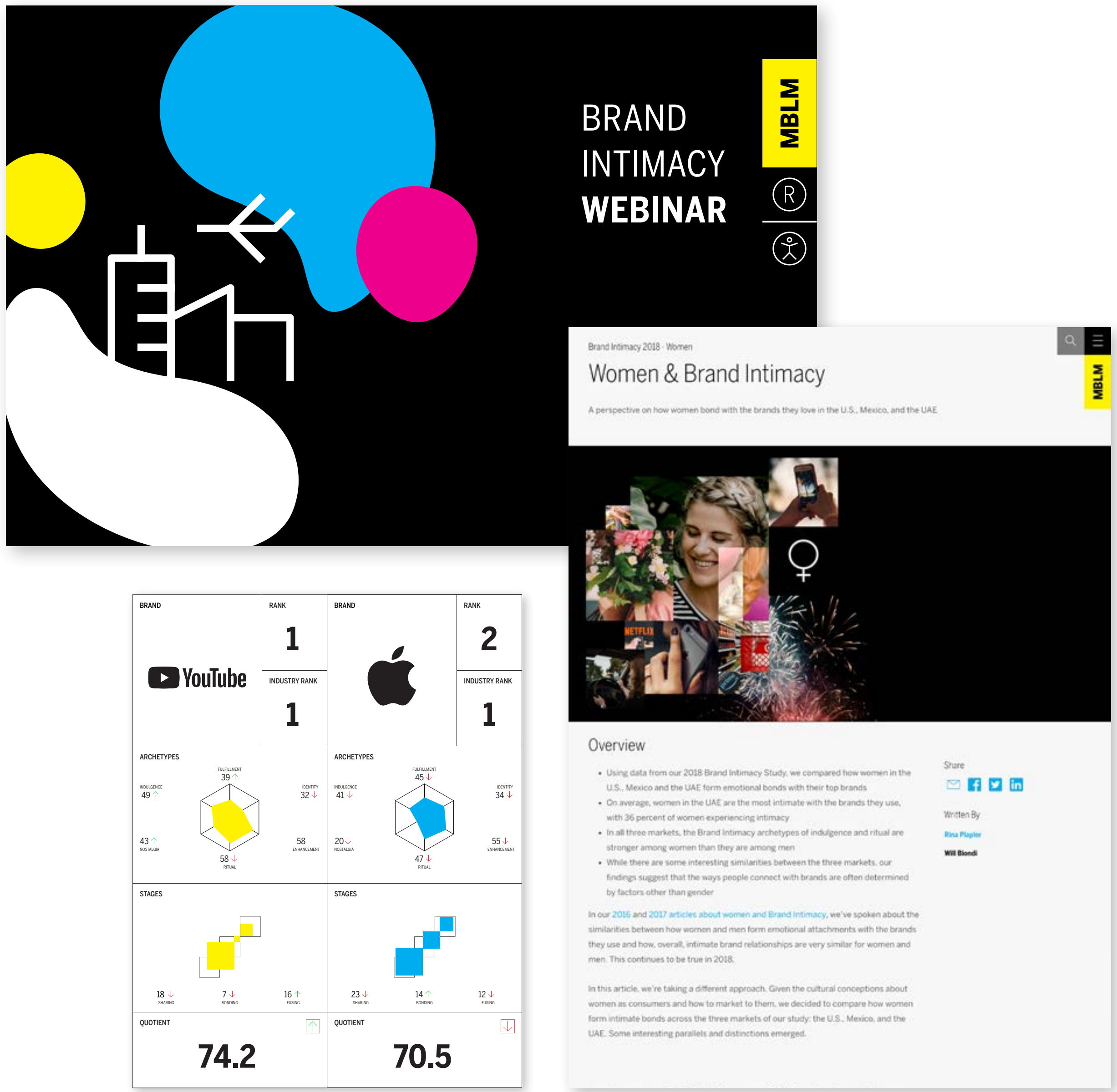
V. BRAND INTIMACY QUOTIENT

The score assigned to each brand that ranges from 1 to 100. The Quotient is based on prevalence (the percentage of users who are intimate), intensity (where the relationship is on the spectrum of three stages: sharing, bonding, and fusing), and character (performance on key archetypes).

It is a shorthand score that demonstrates how a brand is performing relative to its ability to create ultimate brand relationships and enables comparisons to other brands in the same category or to the industry average.

BRAND INTIMACY **2019**

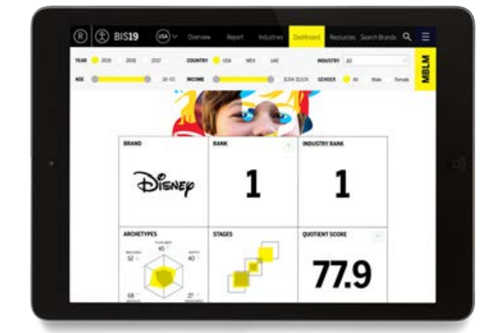
Industry findings, webinars, and articles



Explore findings and insights across 15 industries. Watch our industry webinars for detailed trends and unique category perspectives and read our expanding collection of articles to further understand how brands are connecting with consumers today.

EXPLORE

Data Dashboard



Explore 400 ranked intimate brands with the ability to review findings by age, income, gender, and geography.

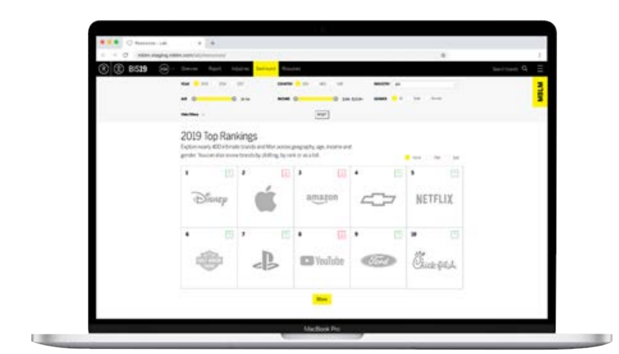
EXPLORE

Custom Reports

Learn all about your brand's intimate performance. Order a custom report to uncover unique category insights, trends, archetypes/stages/quotient scores, demographic findings, economic equity, usage, frequency, immediacy of emotional connection, and can't live without measures. We can also compare historic and geographic data, as available.

EXPLORE

Resources



Review a rich array of information, insights, materials, and ways you can further your understanding of Brand Intimacy.

EXPLORE

METHODOLOGY

During 2018, MBLM with Praxis Research Partners conducted an online quantitative survey among 6,200 consumers in the U.S. (3,000), Mexico (2,000), and the United Arab Emirates (1,200). 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 6,200 interviews and approximately 56,000 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

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SOURCES

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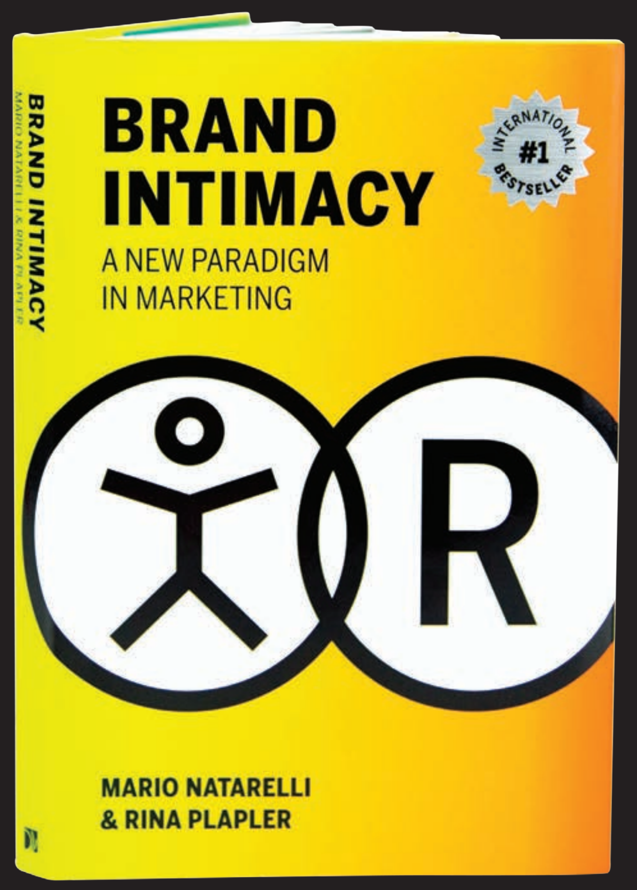

To learn more about Brand Intimacy, in both theory and practice, and how to measure, build, and manage your own intimate brand, order a copy of our international bestseller.

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