BRANDZ TOP most valuable french brands 2019
The French Top 50

Category Breakdown

$ = Brand Value (US$ Millions)

- **Airlines**: $658
- **Home Appliances**: $774
- **Utilities**: $3,496
- **Soft Drinks**: $3,584
- **Food & Dairy**: $3,814
- **Retail**: $17,247
- **Tires**: $6,385
- **Cars**: $12,615
- **Alcohol**: $9,730
- **Insurance**: $7,011
- **Banks**: $5,580
- **Cig & Cigars**: $3,496

Top 10 Most Valuable French Brands

- **#1**: LOUIS VUITTON, $46,357 million, +31%
- **#2**: CHANEL, $39,241 million, n/a
- **#3**: HERMES PARIS, $31,520 million, +21%
- **#4**: L'OREAL PARIS, $26,127 million, +6%
- **#5**: Carrefour, $20,117 million, +12%
- **#6**: LANCÔME, $11,452 million, +18%
- **#7**: Cartier, $7,476 million, +6%
- **#8**: SFR, $7,475 million, +1%
- **#9**: GARNIER, $7,011 million, -29%
- **#10**: Personal Care, $6,847 million, +3%

The Fastest-Growing Brands

- **Luxury**: +36%
- **Personal Care**: +34%
- **Telecom Providers**: +33%
- **Insurance**: +31%
- **Retail**: +31%
- **Cars**: +21%
- **Banks**: +21%
- **Soft Drinks**: +21%
- **Alcohol**: +21%
- **Utilities**: +21%
- **Home Appliances**: +21%
- **Tires**: +21%
- **Airlines**: +21%
- **Food & Dairy**: +21%

Top 50 Most Valuable French Brands

TOTAL VALUE 2019: $293.1 BILLION

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Purpose

- **Innovation**: Getting it right
- **Experience**: Leading brands in the Top 50 on key factors that strengthen brand value

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New on the scene

- **#41**: $954 million
- **#43**: $937 million
- **#44**: $1,094 million
- **#49**: $665 million

WPP
Welcome to our celebration of the brands in the BrandZ™ Top 50 Most Valuable French Brands 2019 report.

These brands are not just category leaders at home, they are in many cases global icons, which have come to represent the finest products, services and experiences in their sector from anywhere in the world.

The biggest brands in the Top 50 have, over the past 12 months, grown even bigger, contributing to a level of value growth in the French Top 50 on a par with some of the fastest-growing markets in the world. That’s quite an achievement in the current economic and political climate.

But there’s a cautionary tale here, too. Because while French brands are rising in value, they’re still lagging behind the leading brands in the rest of the world when it comes to innovation.

“What does that matter?”, you might ask. Especially in a market so driven by heritage brands?

It matters because innovation is what ensures relevance. And while many of the brands that lead this Top 50 ranking are great innovators, around the world, there are other brands doing it better.

In an increasingly global market, that leaves French brands, their markets and their business models vulnerable. There are disruptors, both here in France and abroad, who are rewriting the rules of engagement, raising consumers’ expectations, and winning investor backing.

Who’s innovating and – by implication – who’s not is therefore a key area of focus in this report. We also look at the factors that go towards making a brand appear innovative to consumers, something that’s just as important as the existence of innovation itself.

And we set out the other key ingredients that contribute to making a brand healthy. Health doesn’t just propel a brand up the BrandZ™ rankings; it helps a brand win a place in consumers’ hearts and minds – and that, ultimately, leads to sales, loyalty, and love.

We show that brands of any age and from any category can be bursting with vitality, if they focus on giving the right aspects of their brand a workout.

National treasures achieve world-class growth

In this report, we probe beyond the Top 50 ranking itself to understand the varied strengths of the best performers. Our expert analysis details the factors fueling brand strength and strong financial returns – two key business indicators that BrandZ™ research globally, over more than a decade has proved are intricately linked.

We look at emerging consumer trends that are shaping new media consumption habits and shopper behavior, and present insight from across the WPP Group. These “Thought Leadership” and “Best Practice” pieces cover subjects as varied as artificial intelligence, the rise of French tech, disruption in the retail sector, and how women are represented in brand communications.

WPP has 4,500 talented people working in France, providing advertising, marketing, research and PR expertise. Our companies work together to provide clients with cutting-edge insights that help position brands for market-beating growth.

The global WPP network now extends to 112 markets, and our BrandZ™ catalogue is expanding all the time. If you enjoy this report on French brands, I invite you to browse our long-running Top 100 Most Valuable Global Brands annual study, as well as our rankings and reports into the leading brands in the following markets: China, India, Indonesia, the UK, Germany, Spain, Italy and Australia. All are available from www.BrandZ.com and through our interactive mobile apps, at www.BrandZ.com/mobile.

To talk to someone about how WPP’s expertise could help your brand, feel free to contact any of the WPP companies who have contributed to this report – their details are on page 106. I’d also be delighted to hear from you directly.

Sincerely,

David Roth
introduction
INTRODUCTION

BRANDZ™ TOP 50 MOST VALUABLE FRENCH BRANDS 2019

Overview

A year after the election of President Macron to the Élysée Palace, the frothy optimism about change in France has been replaced by slightly less heady – but still steady – levels of positivity.

Consumer confidence is not exactly buoyant, but it’s at a level where people feel secure in their financial position, and are willing to spend. The proportion of households in which now is considered an appropriate time to make large purchases is above its long-term average, and there has been a recent increase in the proportion of homes where people feel they have the ability to save for the future. When asked about how their living conditions compare with their situation a year ago, this figure is stable, though below average over the long term, official statistics show. The same pattern applies to how people feel about the year ahead. Unemployment levels remain just under 10 percent, but again are stable.

GDP growth in France last year was 2.3 percent, and there was a similar increase in average household income. French consumers are not just spending more money on the same things. Kantar Worldpanel research shows a sharp decline in spending on personal care items – partly as a result of consumers looking for do-it-yourself solutions they perceive to be better for them or for the environment, such as home-made soaps. Home care items and fresh food – especially fresh meat – are also taking a smaller share of shoppers’ spending money.

Where people are spending more is on organic goods and items they perceive as being of higher quality – 53.5 percent of households say they’re willing to pay a premium for better-quality items, which is significantly more than five years ago, when just 46.5 percent said the same thing.

When it comes to President Macron himself, the sheen has definitely faded from his crown. Kantar Sofres-onepoint research this summer for Le Figaro shows that only one in three French people says they trust Emmanuel Macron (down six points in the month to July) – its lowest level since he was elected. Nevertheless, this level is still significantly higher than that of his predecessor, François Hollande, at the same stage in his presidency (32 percent compared to 27 percent for Hollande in July 2013).

Part of the reason people have become cynical about their leaders is a prevalent sense of injustice, on several different levels. High unemployment breeds disaffection with public figures, but there is also a sense that the gap between rich and poor remains wide and is getting wider. Kantar Center on the Future of Europe research shows 64 percent of French people feel that inequality between rich and poor has increased over the past decade. The “me too” movement worldwide has found traction in France, and both men and women are grappling with how to define their roles and responsibilities. And France, like many other Western European countries, is facing questions about national identity as immigration changes its demography.

Sense of stability fuels consumer confidence
The total brand value of the 50 brands to make the 2019 Top 50 is just over $293 billion (or about €254 billion). This is equivalent to just over 11.3 percent of France’s annual GDP, and represents a rise in the past 12 months of 22 percent. In the current climate, this is an outstanding result. The latest BrandZ™ Global Top 100 rose 21 percent, and the Top 50 brands in the UK this year were worth five percent more than in 2018.

The luxury label that made its name with its signature luggage and is now an icon in the world of high fashion, footwear, accessories jewelry, fragrance and more is again the most valuable French brand. Louis Vuitton, recognized around the world simply by its initials, has a brand value of more than $46 billion in 2019. This makes it not just the country’s leading brand, but also one of its fastest-growing brands. LV is worth 31 percent more than a year ago.

Investing in brands is just that — an investment — and one that pays handsome dividends. Between December 2017 and October 2018, the BrandZ™ strong French brands portfolio grew 2.9 percent, while over the same period, the CAC 40 actually lost value: 0.2 percent. That means for every €1,000 invested in shares, a person with a BrandZ™-driven portfolio would have made €31 over someone with an index tracker.

The brands that grew their value fastest over the past 12 months include the fashion and accessory brands we group together in the “luxury” category, as well as high-end alcoholic drinks and retailers. Dior and Rémy Martin were the two fastest-growing brands in the Top 50 this year, up 58 percent and 39 percent respectively. The fastest-growing brands stand out for being great communicators, and for delivering a superior brand experience.

The six brands making their debut in the French Top 50 Brands ranking this year come from five different categories: luxury, personal care, food and dairy, appliances, and retail. These are sectors already well represented in the French ranking, so while the names are new, there is little difference in the composition of this year’s Top 50 compared to 2018’s. Luxury still accounts for almost half the value of the entire Top 50, followed by personal care, with a 37 percent share.

New entries from range of sectors

Brands that are seen as having a strong – and genuine – focus on being responsible corporate citizens are winning the hearts and minds of consumers. Those that scored high on Corporate Social Responsibility this year posted double the brand value growth of low-responsibility brands.

Premium brands are fastest risers

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**France’s most valuable brands post 22% value growth**

Innovation and disruption are supercharging brands’ value growth — especially for those brands that communicate well, and that use their innovation to improve the brand experience. While the Top 50 are significantly more innovative than other French brands, there remains an innovation gap between leading names in France compared to other major world markets.

**First name in luxury leads ranking again**

**Strong brands beat the stock market**

**Top 50 brands worth US$293 billion**

**Brand health adds vigor to bottom line**

**Disruptive influence fuels consumer desire**

**Good work generates great returns**

**BrandZ™ uses five key indicators of health to determine the overall wellbeing of a brand. When we then compare the healthiest brands’ performance over the past 12 months with that of the most “frail”, it becomes clear that health delivers value. In fact, while the healthiest gained 18 percent in brand value, the weakest declined by five percent.**
HIGHLIGHTS

1. A healthy brand means a valuable brand

The fastest risers in the French ranking over the past year perform significantly better than other brands on the BrandZ™ measure of health. This metric takes into account how well a brand performs in five key areas: purpose, innovation, communication, experience and love. Strength in any one of these areas is an advantage for a brand, but the strongest brands perform well on all of them and create a multiplier effect.

2. Be driven by something other than profit

The brands that have a strong purpose beyond what they produce or deliver every day are viewed more favorably by consumers, and ultimately generate stronger value growth. Corporate Social Responsibility is about more than a token tree-planting ceremony; have a genuine social mission, promote it, and make it part of the brand’s DNA. Brands with a strong sense of purpose generate double the growth of those without.

3. It’s vital to shake things up

Innovation is one of the five elements of brand vitality, and is closely linked to experience and love. Brands that are innovative – and are recognized as such by consumers because they clearly communicate their innovations – tend to be loved more. This love sustains a brand in the gaps between innovations. Innovation means having disruptive, market-leading products and approaches to business, as well as creative, ground-breaking communications.

4. Any brand can be innovative

Creative disruption isn’t just the preserve of startups and tech brands; the five most innovative brands in the French Top 50 range in age from just four years old to more than a century – Michelin marks its 130th anniversary this year – and are in categories as diverse as sports retail, tires, energy and telecoms. What marks them out is their ability to change so that they stay relevant.

5. Be different, in a way consumers care about

Being different to other brands is one way of standing out from the crowd, but it’s important that what sets a brand apart is seen as important to the people it’s targeting. We call this “meaningful difference” and it’s this that makes a difference to success in the market and a rise in brand value.

Top 5 learnings for marketers:

- A healthy brand means a valuable brand
- Be different, in a way consumers care about
- Be driven by something other than profit
- It’s vital to shake things up
- Any brand can be innovative
Have a mission that runs deeper than a slogan

Brands are increasingly realizing that offering great products and services is only the beginning of their task: consumers want to associate themselves with brands that have a deeper purpose beyond simply selling things. They're looking for brands that, as well as making money, are genuinely working to improve society, the environment, and conditions for their staff. The key word here is "genuinely". Simply jumping on the green bandwagon won't just fail, it will likely lead to a backlash from a cynical public who wonder why the brand didn't show that it cared about pollution or social justice until now. The mission has to be real to be believed.

1 2 3 4 5 6

1. Cross-category trends
2. Think about life in the slow lane
3. Innovation is paramount
4. Online shopping has room to grow
5. Balance technology with trust
6. Older people could well be the future of consumption

Think about life in the slow lane

With the digitization of daily life making change happen ever faster, many people are looking for ways to relax and make life slow down a little – even if that's only in small ways. In fact, 80 percent of French consumers say they want to slow down the pace of their lives and savor more time with family and friends and pursuing simple hobbies such as gardening and meditation. It's also leading people to rethink their relationship with the items they own and use. While the so-called sharing economy is yet to gather the same momentum seen in many other mature economies, a growing proportion of French people report feeling that their possessions are sometimes a burden to them. And already, 41 percent of households here produce at least some of their own fruit and vegetables. Consider how your brand relates to the need for some down time.

Innovation is paramount

French people are keen to try new things, and sales figures for packaged goods show that where there are new brands, products and variants, there are spikes in interest and purchasing. A decade ago, 48 percent of people said they were looking for new things to try, and that figure is now almost 57 percent. But innovation isn't just about launching something new; it can be providing a new, higher level of consumer experience, or creating a shopping space that feels like more fun, or is more convenient or perhaps more relaxing. Anything, however small, that changes people's lives for the better, can count as innovation. Innovation doesn't just fulfill people's desire for change, it also refreshes the way they feel about the brand that provides it. Of course, large-scale innovation can transform a category. Think of banking, automotive and hospitality, which have all been shaken up by innovative newcomers. All brands need to acknowledge that what has sustained them in the past may not be enough to secure their future.

Online shopping has room to grow

With 34 million French consumers having bought something online last year – 13 percent higher than a year earlier – you might be tempted to think that all the people prepared to use e-commerce are already doing so. Yet there remains considerable room for online shopping to grow, in terms of value, the number of shoppers, the number of shopping occasions for each buyer, and the number of categories that people buy over the internet. Technology and fashion are the go-to categories online, but penetration of other sectors – especially fast-moving consumer goods, two-thirds of which are still bought in physical stores – remains low by global standards. What’s holding people back from spending more is convenience. Kantar research shows that 70 percent of people say they’d try it for the first time or use e-commerce more often if web sites were easier to navigate, especially on a mobile phone, and delivery was faster and free of charge. The fastest-growing areas for e-commerce are women, under-35s and residents of smaller towns and cities.

Balance technology with trust

Connectivity has transformed people’s lives in ways that people now wouldn’t dream of being without. But the pace at which this transformation has happened is leading many to wonder whether they need to retake control over aspects of their digital life. Half of French people say they’re concerned about how much is known about them by businesses, and a quartet think they already spend too much time on their mobile phone. Over half of consumers object to a connected device monitoring their activity, even if that monitoring leads to more personalized services that ultimately make their lives easier. Besides thinking about efficient targeting, content and media channels, brands also need to keep transparency and confidence at the heart of their digital strategy. Just because technology means you can do something doesn’t make it the right thing to do. Trust is hard to earn and easy to lose.

Older people could well be the future of consumption

Don’t call them “seniors”, “silver surfers” or “golden oldies”; treat them like they’re your best customers, because if they’re not already, they soon might be. Already, 31 percent of the French population is aged 55-plus, and this proportion is growing. What’s more, they spend more than millennials and generations X, Y and Z, accounting for over 40 percent of spending on consumer goods. These are people who generally report feeling much younger than they are, and they’re on the lookout for great food, fashion, travel and tech. But they’re not all the same, so work hard to understand segments within the “older” audience to make the right connections.
INTRODUCTION

BRANDZ™ TOP 50 MOST VALUABLE FRENCH BRANDS 2019

KEY TAKEAWAYS

Value doesn't mean what it used to

French shoppers are buying less, but buying better, and they’re willing to pay a premium for goods they perceive as being better for them and for the environment, particularly when it comes to food. A decade ago, 29 percent of people said they wanted better fresh produce; now it’s 33 percent. They’re scrutinizing labels, and more than half of French consumers say they will willingly pay more for higher quality.

The winning feeling has passed

It’s not long since Les Bleus lifted the trophy that the rest of the world coveted, but World Cup fever has now well and truly passed. The success of the national team gave a temporary boost to beer and potato chip sales, which rose to record levels, but the effect was short-lived. World Cup fever is over, so any messaging around sporting greatness or national happiness linked to the event is likely to fall flat – until 2022 at least.

Shopping habits are shifting

France may be credited with having invented the hypermarket, but these large-format, out-of-town stores are in decline, as people shop more frequently in smaller, more convenient stores and go online to stock up on bulky essentials. Brands like Carrefour are seeking to make their biggest stores more of a leisure destination, with wine bars, in-store dining and specialist electronics zones with expert staff, to give consumers new reasons to visit, if a little less often than they used to.

Plastic pollution an opportunity for change

A consumer groundswell of concern about the problems caused by plastic pollution is yet to gather the same level of momentum that it has in several other European markets, but forward-thinking French brands are already looking at ways to tackle it. This is an opportunity for early movers to show their genuine commitment to a cause – before it becomes jumping on a bandwagon. Volvic and Evian, for instance, have made commitments to using recyclable plastic.

Cash still carries clout

The digitization of money has been slower to catch on in France than in many other markets, and there is still plenty of cash around. There is strong consumer trust in banks, and while there’s lots of interest in digital banking, and contactless card payment is increasingly popular, there are few who are so far using their mobile phone to make payments directly.

Loyalty is rarely genuine

Your loyalty club might have a growing number of cardholders, but chances are your members aren’t actually loyal to your brand at all. Many people hold a loyalty card (physical or virtual, on their mobile) for every shop they go into. This lack of genuine loyalty has led Decathlon to stop its loyalty scheme altogether, though others – such as Galeries Lafayette – are refreshing their loyalty programs.

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KEY TAKEAWAYS

Organic is now mainstream

It used to be only the relatively affluent who could afford to opt for organic (or bio) produce, and it was widely seen as an indulgence. Now, over a third of French consumers say bio products represent better quality than non-bio, and they are increasingly willing to spend that bit extra in order to buy them. Organic produce has become democratized; now, 37 percent of bio buyers are families.

Small is beautiful

Shoppers are seeking ways to support local food producers, and 58 percent say they want to buy as local as possible. Supermarkets and national brands are now promoting the regional heritage of selected produce, and a new brand, C’est qui le Patron? (Who’s the boss?), co-created with consumers, is successfully selling a growing range of fresh food, from milk and butter to burger patties. Small packages of indulgent products such as chocolate, cheese and butter are also proving popular as people scale back on treats.

Wine is off the menu

A huge rise in the popularity of aperitifs has fueled rising sales for craft beer and spirits, at the expense of wine, which is now widely seen as something to be consumed only with a meal. Post-work gatherings of friends increasingly involve aperitifs and snacks — crisps, dips, cheese and other bite-sized items are also on the up — rather than a sit-down meal. And as many as seven percent of all meals begin with an aperitif.

Zero is the magic number

French shoppers are scrutinizing labels like never before, but they’re looking for what’s not in the ingredients list rather than what is. Products with no added sugar, processed meat made without nitrates, and lactose-free alternatives to dairy products are all experiencing a boom as consumers seek what they see as more natural food and drink that’s likely to better for their health. Zero colors, zero preservatives and zero sugar are especially hot, with soft drink producers responding to this surge in demand for less sucrose; zero-alcohol beers are doing well, with major brewers such as Carlsberg and Heineken all promoting their non-alcoholic alternatives.

Social media isn’t all about reach

Social content, suitably designed and directed, can provide real cut-through to meet consumer needs. The correct approach will differ by brand, category, customer and social network, but what’s important is that it’s not all about reaching big numbers of people. Over half of French consumers believe the things brands post on social media aren’t relevant to them. Use social media for inspiration, information and transactions, but pick the right channel for each of the three.

Buy one, get only one

The days of “buy one, get one free” offers being everywhere you look are now over. Producers and supermarkets have agreed that the prevalence of these kinds of offers leads only to a race to the bottom — and the result is that consumers form a habit of buying only when goods are discounted, and therefore lose their sense of what goods are really worth. There’s now a cap on the level of business that can be done on promotion. Stand by for more creative ways of winning consumer attention as shoppers are weaned off promotions. Those most sensitive to discounts have always tended to be families, but 57 percent of those most keenly looking for promos now are households without kids.

This is still a PC market

Mobile phones and smartphones in particular are on the up, but most people’s primary connection to the internet is still made via a desktop computer or laptop. For brands, especially those seeking to tap the still-large e-commerce opportunity, this means ensuring that web sites respond according to the device being used to access them, with images, videos and buttons that are clearly visible and user-friendly.

Meat is being sidelined

There’s huge growth in demand for proteins from sources other than meat, as French people look to increase their number of meat-free meals and go not vegetarian or vegan but more often “flexitarian”. Only 2 percent of people in France are vegetarian, but 36 percent say they’re reducing their meat intake. New, vegetable-based products are expanding what was once a niche section of supermarkets targeting only vegetarians; even the iconic French sausage *Knacki* now has a vegetarian version.
KEY TAKEAWAYS

Badges on products, storefronts and websites are being used as a shortcut for customers looking to achieve something good — for themselves or for a broader slice of society — but without the time to do lots of independent research online. Labels like Fairtrade, Eco label (for environmental sensitivity), Bleu Blanc Coeur for health, and Label Rouge for superior quality, help considerate shoppers who also need convenience.

Smart speakers are the newest new thing

Amazon’s smart speakers – market leaders in the English-speaking world – have launched this year in France, allowing consumers (speaking French) to do anything from check the weather, search for information or add goods to their e-commerce basket using voice alone. This is new territory for French brands, with only a few having invested in being linked to voice-activated services, among them the retailer Monoprix. The user base is so far small, but there are opportunities to stand out by being an early mover on voice technology.

Logos signal meaning

If you bore them, they’ll block you

Ad blockers are more widely used in France than both the regional and global averages, with 35 percent of online consumers here using ad blockers — a figure that rises to half of those aged 16 to 24 — compared to a global average of 21 percent. In a sense, then, the battle has already been lost, thanks to dull or poorly targeted online advertising. Make sure your digital communications don’t contribute to those people currently still receiving online ads starting to search for ways to shut out advertisers.

Tailor content to the channel

Many brands are switched on to the power of social media, particularly when complemented by television. But there are few French brands that have so far cracked it when it comes to creating outstanding content for social media; too often, they’re simply trimming their TV ads, running the same thing on YouTube and considering it “job done” - a huge wasted opportunity. Think about creating communities online, using YouTube for “how to” videos and Instagram for inspiring fresh ideas.

Follow the leaders

Forward-thinking brands in selected categories are drawing on the following that online opinion leaders have, particularly on visual media such as Instagram. Beauty brands such as L’Oréal and luxury labels including Gucci are using Instagram, while automotive brands are linking up with bloggers. This is still quite new for this market, however, and there are opportunities to be seen as a sector leader and innovator through the right partnerships.

Go digital, but retain your humanity

While consumers are embracing many aspects of digital connectivity, it’s important to understand how different groups of people feel about different aspects of their lives being digitized. Only 14 percent of French people, for instance, say that they’d prefer to pay for everything on mobile. And while 24 percent have no problem using an automated bot via social media for customer service, that means the vast majority are reluctant. Only 21 percent of French people (compared to 33 percent globally) are open to online-only customer service. Understand who needs the human touch, and when.
INTRODUCTION

BRANDZ™

TOP 50 MOST VALUABLE FRENCH BRANDS 2019

ECONOMY & DEMOGRAPHICS

Population
67.19 million

Population by age
0-14 years: 18.53%
15-24 years: 11.79%
25-54 years: 37.78%
55-64 years: 12.42%
65 years and over: 19.48%

Median age 2017 est.
41.4 France
47.1 Germany
45.5 Italy
40.5 UK
38.3 USA
37.4 China

Life expectancy 2017 est.
81.9 France
80.8 Germany
82.3 Italy
80.8 UK
82.3 USA
75.7 China

Family life
Total number of households 28.9 million
Number of marriages per year 235,000
7,000 of which were same-sex marriages

Medicine

Centers of population

Geography

Land area
640,427 sq. km

Paris
2.2 million

Technology

Adult internet users
82%

Daily hours spent using any media adults
9.73

Annual e-commerce spend per internet user aged 12+
€1,943

Economy

GDP 2017
US $2.58 trillion

GDP growth rate 2017
2.3%

GDP growth forecast 2019
1.43%

Household disposable income 2017
+2.7%

Unemployment rate 2016
9.2%

Imports 2017 est.
US $624.9 billion

Exports 2017 est.
US $551.8 billion

Ease of doing business
31 out of 190 countries


Major industries
Tourism, healthcare, chemicals, aerospace, food, automotive, financial services, robotics

Main import partners
Germany, Belgium, Netherlands, Italy, Spain, US, China, UK

Main export partners
Germany, Spain, US, Italy, UK, Belgium
INTRODUCTION

BRANDZ™ TOP 50 MOST VALUABLE FRENCH BRANDS 2019

Steady levels of business and consumer confidence are fueling an increase in media investment in France. Growth is coming, naturally, from rising levels of digital spending, but also from greater investment in television advertising, which remains a mainstay of most brands’ media plans in this market.

Brands are increasingly using data – their own and that of their agency and publisher partners – to improve the relevance and reach of online advertising. There have been trials of addressable TV, and this is likely to be rolled out more broadly in the near future. And digital out-of-home advertising opportunities are becoming increasingly linked, allowing for programmatic ad serving to passers-by.

Total media investment is forecast to rise by 1.3 percent this year, which sounds low but is actually the highest rate of growth seen in France in eight years. Investment is due to total €11,217 million in 2018.

The proliferation of new media channels thanks to the internet and growing levels of connectivity across France means the number of hours people are spending on media has been steadily rising, and is now two hours more than it was a decade ago.

Out with the old? Not so fast

France remains a PC-centric country, a fact to take into account when developing content and considering the ideal media mix. Imagining that everyone’s on their mobile would be a mistake; even people who are heavy users of their smartphones still tend to use a computer as well.

This is also still a huge television market, despite internet penetration among anyone over age 12 now standing at 82 percent. In fact, of the 9.7 hours a day that the average French consumer spends using any media, 36 percent is spent watching TV; compared to 34 percent online.

Radio retains a strong following, accounting for more than a fifth of people’s media time; this is down from a third just 10 years ago, but is holding steady. Print commands just 8 percent of people’s media time, but this is an average across the adult population, and many French adults probably don’t even pick up a print publication. Among those who do, then, the time spent with those titles is likely to be much higher.

Beware of clichés – the connected world is building upon traditional ways of marketing, not replacing them wholesale, and that’s particularly true in France. Cutting through the hype requires a comprehensive view of the activities your audience is undertaking online, and on what devices, in order to reach them in the right way.

1. Media migration is under way, but it’s not killing off all traditional media. An effective campaign balances online and offline channels.
2. With its very large audience, Facebook is the unavoidable social media platform in France, though with young people tending to use as many as seven social platforms, it’s important not to neglect others.
3. Content needs to be not just adapted for different screens and platforms, but created specifically for the medium and the target user, considering their age, gender, and whether they’re likely to be early adopters or more conservative about life online.
4. Make every piece of content sing. Considering the high proportion of online ad rejection in France, brands need to ensure every single message is a winner.
5. Besides thinking about efficient content and channels, brands need to keep transparency and consumer confidence at the heart of their digital strategy.

68% of online display bought programmatically
6.8% Internet display
+3.0% Paid search
+2.5% Out of home
+1.2% Cinema
+11.0% Magazines
-7.1% Free press
-4.1% Newspapers
+2.5% Outdoor
+6.8% Internet display
+3.0% Paid search
+6.8% Internet display
-4.1% Newspapers
-5.0% Magazines
+1.2% Cinema
-7.1% Free press
-4.1% Newspapers
-4.1% Newspapers
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+2.5% Outdoor
+6.8% Internet display
+3.0% Paid search
The Most Valuable French Brands in 2019 are led by global giants in luxury, personal care, telecommunications and insurance. Louis Vuitton tops the French ranking for the second year running, with a brand value of $46,357 million — up by about a third in the past 12 months. It is followed by the grand dame of French design, Chanel, worth $39,241 million, and Hermès follows in third place. The rest of the Top 10 is largely unchanged since last year, with L’Oréal Paris, Orange, Lancôme, Cartier, SFR, AXA and Garnier completing the line-up.

These are not just strong French brands but powerful and well-loved global brands, and their international appeal means that when times might be tough in some markets, that’s likely to be offset by stronger growth in other countries. Rising brand value for many of the most prestigious brands in the French ranking is coming from parts of Asia, the Middle East and Africa, where growth in disposable income means more people are able to spend on premium names.

The combined brand value of the BrandZ™ Top 50 French Brands is the equivalent of around 11 percent of national GDP. And, if you’ve got the time, the money and a long ladder, the total value of the Top 50, in €5 notes placed end to end, would reach to the moon and back 15 times.

The fastest-growing brands in the 2019 ranking come from the upper reaches of the ranking. This is contrary to what we tend to see in most other BrandZ™ rankings, where the fastest growth tends to come from smaller brands working their way up. In France, even the number one brand – Louis Vuitton – has grown by nearly one-third in value and ranks among the fastest 10 risers.

Five of the 10 fastest risers in France this year are luxury brands: Dior, Louis Vuitton, Saint Laurent/ Yves Saint Laurent, Givenchy and Hermès. High-end spirits brands have also shot up this year, led by Rémy Martin and Martell, and while Sephora is classed as a retail brand, it’s a premium offering within its category. This all reflects the return to growth globally of the luxury market, thanks to rising spend by international travelers, and stronger consumption patterns at home in key markets for the sector, such as China, Japan, the rest of Asia, and the United States.

Yet growth in BrandZ™ rankings does not come about solely as a result of a rising market or sector; the presence of EDF and Citroën among the fastest-growing brands this year – both in categories where there was not strong growth across the board – shows that while external factors can have a bearing on a brand’s ability to grow, it is still possible to significantly outperform sector averages, and to buck trends by growing value when the rest of a sector declines. Put simply: brands have the power to make their own luck.

What these fast-rising brands have in common is a particular strength in communications (22 percent better than the average brand), and in delivering an outstanding brand experience (13 percent ahead of average) to consumers. These are two of the key elements of overall brand health.
Brand Value

Dior was the fastest-growing brand in the French Top 50 this year, up 58 percent. This is a brand steeped in history, having launched 73 years ago. Yet this legend of luxury is a fine example of how a heritage brand can not only keep up with the times, but also help define them. The brand has gradually expanded into new categories, and in the past year has been promoting its fine jewelry, particularly in China.

It has been strengthening the links between fashion and cosmetics with the launch of its Dior Backstage range, and has been highlighting the under-representation of women in the history of art as part of a broader pro-feminism campaign.
Newcomers

The six new entrants to the ranking this year are from five categories, all of which already have a strong showing in the French Top 50. What differentiates the new arrivals from the brands they have replaced is their brand health (more on this on page 36; the new brands are six percent healthier than those whose places they have taken).

Newcomer French Brands 2019

<table>
<thead>
<tr>
<th>Newcomer</th>
<th>2019 Rank</th>
<th>2019 Rank</th>
</tr>
</thead>
<tbody>
<tr>
<td>CÉLINE</td>
<td>38</td>
<td>41</td>
</tr>
<tr>
<td>VICHY</td>
<td>43</td>
<td>46</td>
</tr>
<tr>
<td>Van Cleef &amp; Arpels</td>
<td>43</td>
<td>46</td>
</tr>
<tr>
<td>Tefal</td>
<td>46</td>
<td>49</td>
</tr>
</tbody>
</table>

Source: BrandZ™/Kantar Millward Brown (including data from Bloomberg)

New Arrivals 2019

Luxury Personal Care

<table>
<thead>
<tr>
<th>Brand</th>
<th>2019 Rank</th>
<th>2019 Rank</th>
</tr>
</thead>
<tbody>
<tr>
<td>CELINE</td>
<td>38</td>
<td>41</td>
</tr>
<tr>
<td>VICHY LABORATOIRES</td>
<td>43</td>
<td>46</td>
</tr>
<tr>
<td>Van Cleef &amp; Arpels</td>
<td>43</td>
<td>46</td>
</tr>
<tr>
<td>Tefal</td>
<td>46</td>
<td>49</td>
</tr>
</tbody>
</table>

Brand Contribution

BrandZ™ valuations are unique because they take into account not just the financial might of a business, and the physical presence of a brand on our screens and in our streets. Our valuations also quantify the role that a brand occupies in consumers’ minds. This “power in the mind” is what we call “brand contribution”, and this is what enables financially smaller brands to punch above their weight in the Top 50 ranking.

Two brands with similar financial scale can therefore find themselves in quite different positions in the ranking. This is because there is a difference in the proportion of their intangible value that is brand driven, rather than market driven. That is, they each have a different “power in the mind” of consumers, and this can propel them up or down the Top 50.

In the French Top 50, the power in the mind is very different for different brands. Veuve Clicquot, for example, which ranks 29th this year, has a brand contribution score of five out of five. This means a high proportion of its intangible value is driven by the brand, and it supercharges the brand, so it achieves a brand value of $1.8 billion.

Société Générale, meanwhile, has an almost identical brand value, and is in 30th position in the 2019 rankings. But SocGen has a lower brand contribution score – two out of five – because it is more dependent on operational aspects and presence of its real estate for its prominence in the market, whereas Veuve Clicquot’s brand is the biggest source of value.

Brand value is hugely important for both brands, because it isn’t just a way to supercharge a brand’s performance in the BrandZ™ rankings. A high valuation reflects how well a brand differentiates itself from its competitors, generates desire, and cultivates loyalty.

High valuations also help insulate a brand against decline when times are tough. In challenging times, strong brands tend to be more resistant to a downturn and, when market conditions pick up, they recover faster than the competition.

Seven of the Top 10 brands in the 2019 French ranking have high brand contribution scores – that is a score of four or five out of five.

But many of the other top scorers – those that have the greatest proportion of their value driven by their “power in the mind” are from lower down the ranking. These include Carte d’Or and La Roche Posay, and a range of other personal care and alcohol names – brands that have made themselves part of consumers’ everyday lives.
**INTRODUCTION**

**BRANDZ™ TOP 50 MOST VALUABLE FRENCH BRANDS 2019**

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**Brand Health**

Just as there are many contributors to human wellbeing, there are multiple factors that contribute towards a healthy brand. BrandZ™ analysis has identified five key attributes shared by healthy, strong and valuable brands.

1. **Purpose** (Making people's live better)
   - Decathlon, Free and Michelin have an especially strong sense of purpose.

2. **Innovation**
   - Brands must be innovative ideally in a way that underlines that purpose, which means they're seen as leading the way in their sector and shaking things up.
   - La Roche-Posay, Leroy Merlin and Sephora shine in this area.

3. **Communications**
   - They must also be creative, with powerful, memorable advertising and communications.
   - Think here of Chanel, Crédit Mutuel and Louis Vuitton.

4. **Brand Experience**
   - They provide a great brand experience that meets consumers' needs, and is available when and where consumers need it.
   - EDF, Maison du Monde and Hennessy are great at providing a memorable brand experience.

5. **Love**
   - Over time, consumers develop a strong sense of love towards the brand.
   - Love is what people feel about sector-leading brands such as Carte d’Or, Orange and Tefal.

When a brand is strong on all five of these attributes (scoring five percent above average), they have healthy “vital signs” and we say they’re healthy brands overall. If they are lacking in any one area, they are at risk of damaging their brand health and underperforming in the market. If they fail on all five measures (99 or less compared to an average score for all brands of 100), they are classed as being “frail.”

In France, the healthiest 25 brands in the Top 50 account for 65 percent of the ranking’s total value. Good health is supercharging these brands’ value. These brands are also growing their value faster than the less healthy half of the ranking; on average, they’re worth 15 percent more this year than in 2018, while the less sprightly half have collectively lost two percent of last year’s brand value.

If you’re still not convinced about the value of investing in all five elements of brand health, let’s compare the 43 French brands that appeared in last year’s Top 50 and have made the ranking again this year.

<table>
<thead>
<tr>
<th>Low Scorers</th>
<th>High Scorers</th>
</tr>
</thead>
<tbody>
<tr>
<td>Brand Value Change 2019 vs. 2018</td>
<td>Brand Value Change 2019 vs. 2018</td>
</tr>
<tr>
<td>+8%</td>
<td>+15%</td>
</tr>
<tr>
<td>-2%</td>
<td>+13%</td>
</tr>
<tr>
<td>-3%</td>
<td>+12%</td>
</tr>
<tr>
<td>-10%</td>
<td>+16%</td>
</tr>
<tr>
<td>-10%</td>
<td>+13%</td>
</tr>
</tbody>
</table>

Source: BrandZ™/Kantar Millward Brown

Being healthy is a huge driver of brand value growth, and the brands that are strong in all these indicators of vitality post the strongest growth. The brands that are new to the French Top 50 this year are significantly healthier than those that have dropped out, but the healthiest brands in the ranking overall are the continuing giants – the likes of Louis Vuitton, Hermès, L’Oréal, Orange and Michelin.

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**Brand value change 2019 vs. 2018**

French brands performing well in all five areas grew at a much higher rate than those performing less well.

Decathlon, Air France and Michelin are all among the Top 10 brands in the ranking on all five aspects of brand health. When you think about what these brands have in common, it becomes possible to feel more intuitively what the BrandZ™ data is telling us.

All three brands operate in increasingly crowded and highly competitive sectors. Yet in many people’s minds, they stand apart from the rest – and not just because they are long-standing and trusted brands, and they’re distinctly French.

Air France and Michelin are both premium brands in their category, but Decathlon is not. A high price tag is not what makes a brand healthy. What unites these brands starts with their focus on a mission that has led them since they began. For Michelin, that’s about safety and driver control, while for Decathlon it’s making fitness accessible. They are all innovative, adapting their offer to changing consumer demands. They communicate their distinctive style and their innovations clearly and consistently – the “France is in the Air” campaign sums up the brand’s mission – and they deliver on experience.

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**LEADERS OF THE PACK**
Innovation

Innovative brands achieve more than a few headlines. Investment in being innovative – and in being seen to be doing so – has a very real effect on the way consumers feel about a brand, and that, in turn, drives brand value.

There is also a powerful link between innovation and brand love, and love makes a real difference to the bottom line. A look at the strongest global brands tracked over a decade reveals that the most loved brands more than doubled their brand value in that time, while the least loved grew by less than a quarter. Love is what helps maintain brand strength in the gaps between innovations.

Investment in innovation makes a clear difference to the dollar value of a brand. In the past year alone, the most innovative brands common to the 2018 and 2019 Top 50 rankings have risen in value by 13 percent, while the least innovative have, on average, lost value and are down two percent.

The range of sectors represented by these brands is a powerful reminder that while it’s often technological innovation that fuels headlines, category is no barrier to creativity and a spirit of can-do willingness to explore fresh ideas – key steps in being perceived as innovative by consumers.

**Top 5 innovators in the French Top 50 2019**

<table>
<thead>
<tr>
<th>Innovation Score</th>
<th>Brand</th>
</tr>
</thead>
<tbody>
<tr>
<td>132</td>
<td>Decathlon</td>
</tr>
<tr>
<td>122</td>
<td>Michelin</td>
</tr>
<tr>
<td>114</td>
<td>FreeDior</td>
</tr>
<tr>
<td>112</td>
<td>Dior</td>
</tr>
<tr>
<td>110</td>
<td>Engie</td>
</tr>
</tbody>
</table>

The average score of all brands is 100

Source: BrandZ™/Kantar Millward Brown

While the brands in the French Top 50, and those above in particular, are more innovative than most French brands, there remains an innovation gap between French brands and much of the rest of the world.

In fact, the French Top 50 are only 3 percent more innovative than the average of almost 2,000 French brands covered in the BrandZ™ research. This indicates that even the country’s most forward-thinking and successful brands have considerable work to do if they are to remain globally competitive.

When French consumers are asked about the brands – from anywhere – that they consider to be most innovative, only three of the Top 10 are French. To consumers, British tech brand Dyson is the most innovative brand they know, although home-grown retail star Decathlon is a close second. Netflix, Samsung and IKEA round out the Top 5.

What’s curious is that most of the most innovative French brands – according to French consumers – are NOT in our BrandZ™ Top 50, generally because they are too small in scale to be included.

These include the banking brands Hello bank!, Fortuneo, Boursorama Banque, Monabanq and BforBank, which are all shaking up their sector by shifting consumer expectations. Also scoring big on innovation but outside our Top 50 are the beer brand Desperados and burger chain Big Fernand, which matches McDonald’s in France for innovation.

This indicates that there are pockets of innovation in France, and that consumers are responding to them. The giant brands that feature in our Top 50 should also be paying attention.
**INTRODUCTION**

**BRANDZ™ TOP 50 MOST VALUABLE FRENCH BRANDS 2019**

**Brand Trust and CSR**

Brands not only have to do the right thing by the people who buy them – they also have to do something for the greater good.

For many brands, not just in France but around the world, corporate social responsibility (CSR) has been a fairly recent addition to the public relations remit. A bit of tree planting, recycling, and turning off the lights.

But the world’s consumers are telling us that the way a business behaves has a strong bearing on their propensity to buy.

**Behaving responsibly – winning trust**

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But the world’s consumers are telling us that the way a business behaves has a strong bearing on their propensity to buy.

BrändZ™ has therefore examined the performance of French brands based on how socially responsible they are perceived to be.

The most socially responsible brands among the 43 brands common to both this year’s and last year’s rankings rose in value by 14 percent, on average, while the low scorers on CSR gained just seven percent.

**Leading brands in the Top 50 for social responsibility**

<table>
<thead>
<tr>
<th>Brand</th>
<th>Position in Top 50</th>
<th>Brand Value Change 2019 vs. 2018</th>
</tr>
</thead>
<tbody>
<tr>
<td>DECATHLON</td>
<td>24</td>
<td>+19%</td>
</tr>
<tr>
<td>MARTELL</td>
<td>45</td>
<td>+25%</td>
</tr>
<tr>
<td>EDF</td>
<td>27</td>
<td>+33%</td>
</tr>
<tr>
<td>Crédit Mutuel</td>
<td>39</td>
<td>-19%</td>
</tr>
<tr>
<td>MICHELIN</td>
<td>11</td>
<td>+5%</td>
</tr>
<tr>
<td>AIRFRANCE</td>
<td>50</td>
<td>+2%</td>
</tr>
<tr>
<td>CRÉDIT AGRICOLE</td>
<td>23</td>
<td>+5%</td>
</tr>
<tr>
<td>ACTIVIA</td>
<td>20</td>
<td>-5%</td>
</tr>
<tr>
<td>ENGIE</td>
<td>34</td>
<td>+12%</td>
</tr>
<tr>
<td>Hennessy</td>
<td>18</td>
<td>+20%</td>
</tr>
</tbody>
</table>

**Top 10 most trusted French brands**

<table>
<thead>
<tr>
<th>Brand</th>
<th>Position in Top 50</th>
<th>Brand Value Change 2019 vs. 2018</th>
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</thead>
<tbody>
<tr>
<td>MICHELIN</td>
<td>11</td>
<td>+5%</td>
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<tr>
<td>Hennessy</td>
<td>18</td>
<td>+20%</td>
</tr>
<tr>
<td>CARTE DOR</td>
<td>44</td>
<td>NEW</td>
</tr>
<tr>
<td>Tefal</td>
<td>46</td>
<td>NEW</td>
</tr>
<tr>
<td>Sephora</td>
<td>26</td>
<td>+12%</td>
</tr>
<tr>
<td>Sevian</td>
<td>31</td>
<td>+5%</td>
</tr>
</tbody>
</table>

Closely related to this is the level of trust that consumers feel about a brand. Trust is important not just because it’s an indicator of whether a consumer will buy a brand again, but also because BrandZ™ global research shows that trust and recommendation are strongly linked. Recommendation matters enormously now, given the increasingly widespread usage of social media.

Trust often takes many years to earn, and some of the most trusted French brands have indeed been around for decades – names like Michelin, Hennessy, Air France and Evian. Many of the Top 10 most trusted brands also feature among the brands seen as having the strongest CSR.

Source: BrandZ™/Kantar Millward Brown (including data from Bloomberg)
The value of investing in brand building is not an abstract concept; it shows up in the business bottom line. In fact, a portfolio of strong French brands as measured by BrandZ™ has significantly outperformed the CAC 40 index. While the value of shares in the BrandZ™ France portfolio has risen 2.9 percent in the 10 months to October 2018, the CAC 40 has actually declined by 0.2 percent, over the same period. Both have ridden similar highs and lows, but as the graph below shows, when external factors put pressure on all businesses, those with the strongest brands tend not to fall as far, and when they bounce back, they usually bounce higher.

Two investors each buying shares worth €1,000 in December last year — one putting their money in an index tracker and another backing the companies behind the BrandZ™ strong brands portfolio — would not both have posted gains had they cashed in this October. The tracker fund investor would have lost €2, while the BrandZ™ investor would have made €29.

This result echoes what we see globally; a portfolio of BrandZ™ leading brands outperforms leading market indices. Over 11 years of tracking the strongest global brands, a BrandZ™ portfolio has gained 172.1 percent in share price value, significantly outperforming both the S&P 500 and the MSCI World Index.
thought leadership
Clients are increasingly questioning the relevance of brand tracking, but it’s not because they don’t see the value of brands. What they doubt is the effectiveness of brand tracking programs.

Kantar Millward Brown and Kantar TNS have been talking to clients and account teams all around the world to understand what’s going on. We see that, to maximize brand value today, clients need an agile, actionable and future-oriented integrated framework to build and grow their brands in the digital age. The ability to act immediately is more important than ever before.

We now design “Holistic Brand Guidance Systems” to address three core needs: speed, cost efficiency, and diagnostic insight, to provide better value for each brand and their budget. We harness all available data to help them shape future growth. Our brand guidance systems, whether a deep-dive strategic solution or ongoing performance measurement and optimization, all focus on an understanding of how to drive brand growth.

There are four layers to this multi-source control system, helping brand managers define their strategies and marketing plans, and allowing them to continuously improve their activations.

1. Brand strategy at the core

We see brand strategy and brand guidance as two sides of the same coin. An effective brand guidance system needs to check clients are on track with their strategy – and help them course-correct accordingly. It then needs to feed back into and inform the evolution of that strategy. Our approach provides a holistic way to inform brand management. In the brand strategy space, we can help clients understand what their brand currently stands for, what it should stand for, and how to activate it consistently across channels to help them create winning brands.

2. Performance measurement to fuel fast action and reaction

In this fast-moving, competitive world businesses need to read the signals about their brand and campaign performance, and make sure they’re aligned with the brand strategy, in order to act and react quickly. This requires:

- A framework linked to growth combining survey and non-survey data, providing the actionable insights clients need for their business, when they need them. This should integrate validated survey measures (fast, mobile-friendly surveys) with social, search, sales, media, behavioral data and more. Programs should be tailored to brands’ specific needs.

3. Deep-dive modules for continuous improvement

In this world of finite budgets but fragmented, hard-to-engage consumers, brand managers need to ensure every marketing dollar is working hard. They need diagnostic insight into the latest consumer sentiment and how their activity is (or isn’t) connecting with consumers. So, brands should trigger relevant deep-dive modules to answer their challenges as they arise, such as when signals in the data raise questions about a certain activation, or competitor activity. Research can provide actionable insights on topics related to touchpoint performance and activation, media investment optimization and creative content, and guide brand managers as they seek to make their brand better resonate with their target audience.

4. Prediction and future focus

Integrated insights provide predictive, future-focused and actionable recommendations. At a time when growth is hard to come by, marketers need to be constantly uncovering and defining the best opportunities for future growth. They need to harness all of the market and consumer data they have available to understand exactly where and how to keep winning. Brands should therefore periodically regroup, pulling together all available data and using it as a lens through which to look at the drivers of their growth.

Holistic brand guidance offers a tiered portfolio of advanced analytics solutions to drive consumer-centric decision making. Analytical approaches, tools and time-series models use data from all available sources to identify key growth drivers (both short and long term), as well as future opportunities and ways to improve ROI.

These approaches use research in creative, agile and logical ways to shape business understanding of how consumers respond to brands in the real world – and fuel long-term growth in brand value.

Holistic Brand Guidance: Driving growth through agile intelligence

Pierre Gomy
Managing Director Brand & Communication, Kantar TNS - Kantar Millward Brown
Pierre.Gomy@kantar.com

// Advanced analytics, which can highlight critical information in an interactive dashboard.

// Hot alert, early-warning indicators (flagging up strong growth, alarming signs of decline, or competitive activity) to help clients course-correct and optimize marketing investment.

Real-time performance measurement systems allow brands to make fast, informed decisions, helping them stay one step ahead of the competition. These tools should all be adapted to the scale of the brand and its media investments.

Kantar is the world’s leading data, insight and consultancy company. We know more about how people live, feel, shop, vote, watch and post worldwide than any other company.

www.kantar.com
We’ve grown accustomed to the digital revolution, but the next stage will be led by machines, and we have to prepare for it.

Artificial intelligence became part of mainstream conversation with the rise of AlphaGo, and before that, there was IBM’s Deep Blue. This was the technology that, having been beaten by chess master Gary Kasparov in 1996, went on to defeat Kasparov, finally, in 1997. We all said then that machines had become intelligent, yet it took another 20 years before we saw true artificial intelligence.

AlphaGo learned by studying players of the game “Go”, and then played – and defeated – human Go players. It became European Go champion 2015, then world champion in 2016.

And then we said to ourselves: That’s it, the machine is more intelligent than us! It had been two decades in the waiting, then something happened six months later that is the real AlphaGo revolution.

It’s AlphaGo Zero, which has a key additional feature: it doesn’t just play against humans, it plays against itself.

This time, the computer taught itself the game of Go. It was given the three basic rules and then it played and played – millions of times, until eventually it beat the old AlphaGo technology 100 games to zero! It played shots that no human could have imagined; shots that had never before been played.

So, imagine if we took programmatic buying of digital media, which is already effective, and then added the kind of artificial intelligence behind Deep Blue and AlphaGo Zero. We could give it a set of rules to play by, set the goal, and then leave the computer to do what it “thinks” is best.

IBM had the means to do exactly that, and equipped computer technology to spend 18 months learning by making 53 million media purchases in the UK market. It learnt so much that, just like AlphaGo Zero, it became much more effective at media buying than IBM’s media agency in that market.

And here are the results: the cost per click was reduced by 35 percent; an amazing performance! This technology learnt to optimize buying according to five parameters: time, device, language, format and location. There was just one objective: improve click-through rates. A complex challenge, but one that IBM’s Watson technology made look incredibly simple.

The future of this is in what IBM calls the “dark data”, that is, by adding parameters that are a little more subjective: using casual language in communications to match the context in which it appears.

This might sound futuristic, but the US lingerie e-commerce site Cosabella is already doing this. This 35-year-old brand decided to affect a digital transformation, and did this using artificial intelligence – a startup called Albert, to be precise. The result: 336 percent growth in sales for an e-commerce site that was already leading its sector. This marks a turning point in the world of e-commerce. Albert has achieved autonomous targeted media buying.

So, what’s the next step? Video. This is where advertiser investment is moving. Wise Air, an Israeli startup, has already developed an extremely strong system of optimizing online video advertising buying using artificial intelligence, with a self-learning algorithm. Still, we are in the early stages of artificial intelligence.

Within a year, though, we expect this kind of technology to be fairly commonplace. At WPP, these kinds of algorithms have already begun to be implemented into programmatic buying platforms. When we add to that the human touch, we can ensure relevance. This way, we can stop bludgeoning people with advertising messages they don’t want, and can optimize the machines to achieve something more meaningful and effective than just reach and repetition.
Don’t be afraid of digital – there’s little point; it’s already here. And whether we call it rebellion or revolution matters little, as it’s already taken place. The reality of digital now is that it pushes us to be ever more creative. But do not be fooled. Creativity is fascinating, but in the digital age it can be extremely violent.

In our profession, one of the first digital revolutions was the arrival of Flash banners – an early symbol of digital creativity. Yet they disappeared overnight because they were no longer useful. And let’s not forget all the platforms that came and went. Remember Chatroulette and Hop? Vero disappeared even faster.

Time seems to be accelerating and ultimately it is us, the consumers, who choose whether something works or does not. The other day in a café, I overheard students next to me asking each other “Right or left?”. But what were they talking about? Of course: Tinder. Our daily life is all about whether we “add each other on Facebook” or “I follow you on Instagram”, and the vexations that go with these new behaviors. If I follow you but you don’t follow me, that’s not good.

All this forces us to be reactive and proactive, trying to understand the market. Whether we like digital or not, we have a sense of schizophrenia, because we expect recognition through digital media, or even have an audience. To understand the market means turning this schizophrenia into a positive asset, but how?

At the heart of this, before we even talk about content, is culture. Step one is to forget our usual socio-demo classifications: 25-34 years, millennials and generations X, Y, and Z. There are enough tools now to allow us a much finer classification, and to then match our creativity with the desires of consumers. That creativity must be both beautiful and useful. Creativity is also the ability to personally address a consumer and generate an emotion.

Timing has also changed; brands, products, nature and the media all now seem to operate at their own pace. We find that we like the same music as our children, and two weeks later, they dismiss it as cheesy and “has been”.

For young people, their creative tempo is determined by Snapchat, Deezer and Spotify, while some of us are old enough to remember the rhythms set by Melody Maker or even the New Musical Express. We must therefore understand each other’s tempos, knowing to ask ourselves at all times what tempo we should be running at.

One of our studies shows us that consumers are extremely benevolent with brands online. When they communicate, it is essentially to give positive opinions. Not only are digital media a means of communicating, they’re also a way for brands and consumers to create, to co-create, and to delegate creation. Adidas understood this well when they created Deerupt. This analyzed the cultures prevalent on Instagram, the way the young people took photos of their shoes, and created shoe designs that were more “Instagrammable” and “shareable”. This shows a real understanding of the habits and preferences of the consumer.

The fact that consumers can now use digital media to help brands could be seen as us having arrive at utopia. But we must not imagine this means we no longer need our own R&D or innovation, because we imagine consumers can do all this for us. It remains up to us to influence brands, and encourage them to stop talking about delivering the right message at the right time, and rather to focus on delivering emotion to consumers. The real digital revolution will be less about platforms and more about emotions.
Disrupt the status quo to sustain brand growth

And when we compared 2,419 brands measured over five years, we found that brands with strong meaningful difference grew three times faster than the weak ones when salience increased.

The conclusion is clear: to benefit from growing salience a brand needs to start by being seen as different in some way, provided that difference has the potential to be meaningful to a wider audience. So, how do you ensure meaningful difference?

A better product designed to meet existing or new functional needs will always be a powerful lever, provided it is marketed effectively. Tesla is reinventing the automotive category and Dyson’s vacuum cleaners and fans command a huge premium because of the brand’s commitment to efficacy and design.

Related to a better product is a better experience. Brands create a better experience when they make life simpler and more convenient for their customers: Airbnb has offered an easier way for people to book stays away from home; Uber has revolutionized the world of taxi hire.

But category innovation isn’t just for the “new kids on the block”, and established brands should never stop trying to identify ways to keep ahead of the competition. Take the examples of Nike, Starbucks and Hilton, which have all created apps that either enhance people’s lives or make the brand experience more convenient.

Meaningful
This is the foundation of any brand. Unless a brand is seen to meet people’s needs, and is liked, it is unlikely to be bought.

Different
This is the brand’s competitive edge that also helps it to justify a premium. Brands need to be different, look different, or behave differently if they are to achieve their full potential.

Salience
Growth is unlikely unless a brand can increase its salience. The Ehrenberg-Bass Institute has long championed salience as the only important growth driver, but when we integrated data from BrandZ™ with behavioral data from Kantar Worldpanel, we found that growing salience on its own did not help grow market share.

Meaningful difference is necessary for an increase in salience to successfully deliver growth.

BRANDZ™ TOP 50 MOST VALUABLE FRENCH BRANDS 2019

Leffe brand reinforced meaningful difference by associating the brand with the “aperatif” drinking occasion, launching new variants, and improving recognition by updating packaging and launching iconic drinking glasses. This ensured increased salience for the brand in relation to that consumer occasion.

Over eight years, Leffe grew perceptions of its brand value by 2,228 percent, far outpacing the BrandZ™ Top 100 Most Valuable Global Brands, which grew, on average, by a creditable 152 percent.

Why do more established brands tend not to be very disruptive? The short answer is: risk aversion. Knowing what works now to generate business success tends to be where most brands place their bets. But this “business as usual” mentality can also prevent them from allocating sufficient resources to the creativity and innovation needed for sustained growth.

The good news is that any brand can be disruptive provided it does something different from the norm that creates new value for customers or unlocks existing potential. To illustrate this further, we need to look at three topline measures of brand equity that Kantar Millward Brown has found relate to financial value growth.
Where are all the women? Over the years, many creative directors, sociologists and gender specialists have successively addressed one of the most sensitive and challenging questions of the past century in advertising. That's the good news. The bad news? We still have a long way to go.

We thought we were past it. Turns out, we aren’t, and it might actually be worse than a decade ago, considering the improvements we have supposedly made when it comes to gender equality in advertising. How could women still be so conspicuously absent from the sector when, in fact, they’re the biggest spenders in Western societies? While there are certainly remnants of ancestral biases in the societies? While there are certainly remnants of ancestral biases in the general perception of women, which are expressed quite strongly in their representation on-screen, there seems to be more to this issue than that.

In recent research done with Google, the University of South Carolina and led by the Geena Davis Institute, J. Walter Thompson has revealed some telling numbers. Shedding light on what seems to be a structural problem, the study shows that over the space of 10 years, (between 2006 and 2016), women’s representation in ads has increased from 33.9 percent to 36.9 percent. Yes, that’s only three percentage points more. Madeleine Di Nonno, the Geena Davis Institute’s CEO, described this as “surprising and essential.” “These findings are essential because they allow us to understand the magnitude of a subconscious problem,” she explained.

Three powerful numbers in particular should be kept in mind when we, both CMOs and advertisers, are designing for the future of advertising.

1. 25 percent of ads feature only a man, versus 5 percent with a woman only.
2. In 2016, 41.7 percent of women featured in advertising were given less than 20 percent of the speaking time over the course of an entire dialogue.
3. In 2015, out of 100 box office movies, the ones featuring a woman as the main character have generated 16 percent more profit than those featuring a male star, as brilliantly illustrated by episode seven of the Star Wars saga.

Challenging the status quo with women, for women

The way we feel about the advertising of 50 years ago – reductive, sexist and limiting – can’t be the same in 10 years. Now that we have developed adequate technologies to identify and understand all the intricacies of this issue, the status quo needs to change.

The problem doesn’t come with a magic bullet, but it does come with cues that brands and agencies can use right now. “It’s because girls are a minority in creative departments that we are more used to seeing faces and hearing stories that are not like our own,” argues Becky McOwen Banks, a creative director, in her TEDx talk, “Where are all the women in advertising?” After all, who, if not women themselves know better how to catch women’s attention?

The J. Walter Thompson and Geena Davis report also addresses the shortfall of women behind the scenes in advertising, and shows how some have used this gap to generate public interest. “Girlgaze”, launched by the photographer and media entrepreneur Amanda de Cadenet, is one such venture. The goal of the platform is to support and empower Generation Z’s young women to take the lead by sharing advice, mentorship and access to job opportunities. As of April 2018, Girlgaze had 4 million submissions and was turned into a book.

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Encourage people to look at the world with fresh eyes

J. Walter Thompson Amsterdam has successfully launched one of Opel’s most acclaimed hiring campaigns: Jade.

Half of all cars are acquired by women, but only 4 percent of car salespeople working at Opel are women. Drawing on that unsettling number, the car brand has started a national conversation about people’s perceptions of car-related professions and, as a result, witnessed a growing number of female candidates.

Celebrate women from seven to 77 years old, and beyond

At J. Walter Thompson Paris, we’re doing our best to advertise for all women’s needs. With Hydralin, we worked on addressing the issue of menopause and tackling stereotypes. When we launched “Good Sex Is Not About Age”, featuring women aged 55-plus talking about their sexuality, the public reaction was instantaneous: they adored it.

As life expectancy increases, so too does the need to talk to women in a language that resonates with them, every step of the way. If one of the takeaways of the Geena Davis Institute’s report suggests that the deficit in representatively comes from a shortcoming in the workforce, the ball is now in the industry’s court. Featuring women in commercials won’t be enough to foster long-lasting public respect for our industry. However, it will be a great start towards changing the game.
In Paris, Ogilvy has 500 employees with more than 20 different nationalities, making it the third-biggest hub of the network.

www.ogilvy.com

Batoul Hassoun
Managing Director
Ogilvy Consulting
Batoul.Hassoun@ogilvy.com

Claire Gallon
Senior Consultant
Ogilvy Consulting
Claire.Gallon@ogilvy.com

Brand culture: the secret asset to grow French Tech

Last year was a record year for startups in France, raising close to €2 billion, up 10 percent on the previous year. Led by DoctoLib and ManoMano, many of these startups are part of the new BrandZ “French Digital Champions” ranking.

In autumn this year, we will also see the launch of the Next 40 index, a kind of CAC for startups, which is one of the 100 flagship measures planned by Secretary of State for Digital Affairs Mourir Mahjoubi. The Next 40 index will identify high-potential startups, to accelerate their growth and reputation both in France and internationally. With all of this going on, how can we best help startups today grow from Next40 to CAC 40 businesses tomorrow?

Finding a purpose to accompany growth

It is essential that French Tech companies express a purpose that goes beyond technology, which can so easily be copied and updated. This will allow them to steer their own growth and stay on course in times of turbulence.

To achieve this, it is crucial that businesses recruit the best talent. Effective recruitment means identifying people who share your values, then assessing their personality as well as their skills, and developing a sense of belonging to the shared entrepreneurial adventure. At the same time, it is important to retain those who first contributed to the success of the business, to increase their motivation and prevent them from burning out. To do this, brands must develop a strong talent-engagement program that reinforces their bond with the company.

It is therefore the startup’s ability to develop a culture that is both directive and inclusive, that will determine its success.

The development of such a culture has allowed Zappos, an online shoe company, to quadruple its revenue in just one year. By affirming its intention to “deliver a wow effect through service” and spreading its culture throughout the company – most notably through the creation of specialist training in customer service – Zappos successfully diversified its services to include leather goods, clothing, children’s supplies and more. This helped Zappos make Fortune’s “Top 100 Companies to Work for”, entering the ranking in 23rd place. More importantly, it has allowed the business to maintain the independence of its teams, and its innovative mindset in the years since its acquisition by Amazon for $1.2 billion in 2009. As former Zappos strategist Robert Richman says, “It’s not the market. It’s not the economy. It’s not even your products and services ... it’s culture that drives success.”

Continuously reinvent yourself to stand the test of time

Once they have entered the Next 40, the next challenge for startups is to stay up and running. This is no small feat considering the average lifespan of a company in 2020 will likely be 20 years, compared with 60 years in 1960. This challenge is even more pronounced for French startups, in 2017 the estimated lifespan was just four years...

This is where, again, culture can come into play, but the challenge is threefold:

Free the company from the “start-up” image. The image many people have of a startup is usually a combination of youth, independence and democracy, in contrast with the reality of long-established businesses. Empowering employees can bring benefits as well as risks, as evidenced by the testimonies of former Google or Facebook employees. For a business to grow to the CAC 40 levels, a trendy workplace and a supply of Haribo sweets will not be enough. Next 40 companies will need to align their culture with their ambitions, and reinterpret both as they evolve.

Develop a culture that goes beyond the founding figure. This is what CAC 40 companies like Michelin have achieved, whereas the storytelling of startups is too often based on mythology of the visionary hero, who, having started alone, manages to defeat conservatism. Think of Mark Zuckerberg, Jack Ma or Xavier Niel. If the founder remains at the heart of the brand, startups must update the mythology over time. This has been the case for Nestlé, which relied on the legacy of the work of chemist Henri Nestlé, to reinforce its position as a leader in child nutrition.

Bring culture to life, every day: They will need to continuously reinvent it to adapt to the new realities, to fit in contrast with the reality of long-established businesses. The development of such a culture reinforces their bond with the company.

Finally, by accepting that the brand is constantly evolving at the hands of those who are in contact with it, we are confident that the French Tech companies which will consider and develop their culture as a growth pipeline will be the ones standing out, and probably one day, the ones entering the CAC 40.
BrandZ™ French Top 50
# BrandZ™ Top 50 Most Valuable French Brands 2019

## Brand Contribution Index

Brand contribution measures the influence of brand alone on earnings, on a 1-to-5 scale, 5 being highest.

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### Source: BrandZ™ / Kantar Millward Brown (including data from Bloomberg)
Chanel is a luxury brand most famous for its signature fragrance, Chanel No 5, but with an extensive range spanning high-end fashion, cosmetics, accessories and fragrance. While it is a powerful heritage brand, Chanel works with celebrity ambassadors and uses modern music and social media to build appeal among younger audiences. In the past year, Chanel has formed a strategic partnership with fashion “unicorn” Farfetch, the online luxury platform, though it has no plans to start selling its handbags or ready-to-wear fashion online. Instead, it will use the link with Farfetch to enhance the brand experience – the Hermès Carré Club – where visitors can see silk artisans at work, relax in the Carré Café, sing their hearts out at “Carré-OK”, or dance the night away at the Carré Disco.

Lancôme’s high-end perfumes, skin care and cosmetics are sold globally. The brand has taken French ideas of beauty and elegance to the world, linking femininity with strength, demonstrated through its choice of women with powerful personalities as brand ambassadors. The brand often works with celebrity designers, and its latest collaborative collection is with New York-based Proenza Schouler. The collection boasts bold packaging and features pinks, reds and oranges for lips, and nudes for nails. Growth in China and among baby boomers and millennials has led Lancôme to strong sales growth over the past year, helped by hit products such as Monsieur Big mascara and Teint Idole foundation, and the launch of Advanced Génifique mascara and Teint Idole foundation.

L'Oréal, the world’s largest beauty company, is synonymous with the globally famous tagline “Because I’m worth it”, the beauty brand L'Oréal Paris has a range that spans make-up, skincare, haircare, hair dye, and men’s products. Its mission is to provide accessible, innovative products that help consumers – primarily women – feel good about themselves. Brand ambassadors celebrate ethnic diversity. China has become a major market for L’Oréal Paris, and the brand is highly active online, both through e-commerce channels and in its communications. The brand is part of L’Oréal Group efforts to innovate by using technology to help consumers identify the products that are best suited to them, such as through its Make Up Genius app, and the acquisition of augmented reality specialist Modiface, which lets people “try on” makeup before they buy. It is also exploring how to build relationships with consumers using voice-activated smart speakers, which the group estimates will account for 20 percent of all searching done within 18 months.

Orange is a premium mobile phone network and broadband provider, which promotes itself as providing a highly relevant product offering and unmatched customer experience. In the past year, it has gained 500,000 new fiber broadband customers, taking it to a total of two million households. This has been one of the main drivers of growth, along with the launch of Orange Bank last November, which has been very well received by consumers. The bank, part of Orange’s diversification strategy, is 100 percent mobile-based, and provides real-time balances, mobile payment, and access to a virtual advisor 24 hours a day, seven days a week. Diversification initiatives target five areas: finance, content, devices, smart life, and energy. Orange’s brand mantra is “Human Inside”, which emphasizes the need for digital innovations to serve people and society. The brand has this year launched a new corporate campaign, “Orange brings you closer, the rest is in your hands.” This is running in all 29 countries where the brand is present.
Cartier

Cartier is a watchmaker and high-end jeweller, with several of its designs made consistently over many decades. The brand is perhaps best known for its Tank and Santos watches, though the product range extends to leather goods, fragrance and eyewear. Cartier invests heavily in a creative approach to digital communications, with strong YouTube and Instagram channels, as well as search engine marketing and a mobile-specific website. In the past year, Mason Carter launched Coloratura, a collection of brightly colored jewelry designed as a celebration of diverse cultures linking the past and the future. The brand has, along with several other luxury labels, begun opening its doors to immersive experiences that give consumers a different perspective on Cartier and its craftsmanship. These experiences have been launched at the historic Cartier flagship store at 13 Rue de la Paix.

#7
Parent Company
Cie Financière Richemont SA
Brand Value
$7,476 Million
Change from 2018
+6%
Headquarter City
Paris
Category
Luxury
Year Formed
1847

#8
Parent Company
Altice Group
Brand Value
$7,470 Million
Change from 2018
-3%
Headquarter City
Paris
Category
Telecom Providers
Year Formed
1987

#9
Parent Company
AXA SA
Brand Value
$7,011 Million
Change from 2018
+5%
Headquarter City
Paris
Category
Insurance
Year Formed
1985

#10
Parent Company
L’Oréal Group
Brand Value
$6,847 Million
Change from 2018
+3%
Headquarter City
Paris
Category
Personal Care
Year Formed
1904

#11
Parent Company
Compagnie Générale des Etablissements Michelin
Brand Value
$6,385 Million
Change from 2018
+9%
Headquarter City
Clermont-Ferrand
Category
Tires
Year Formed
1889

AXA provides a range of insurance products along with savings and pension services and related financial products. Its heritage stretches back 200 years, though it has only been known by the AXA name since 1885. It operates in more than 60 countries and serves 107 million customers worldwide. In late 2017, the group announced a simplification of its operating model, in part to enable its operating companies to get closer to the consumers they serve. The brand’s public image remains business-like and reflects AXA’s premium positioning in the financial services market. Advertising shows AXA helping customers manage the ups and downs of daily life, moving away from a focus on specific insurance products and emphasizing AXA as an open, helpful brand.

In late 2017, AXA launched its first global campaign, rather than focusing on AXA’s expertise, it featured its customers’ stories and points of view, showing AXA as part of a process that empowers people to achieve their goals. AXA has listed its US subsidiary on the New York Stock Exchange, and has acquired XL, now named AXA XL, which will focus on insurance, reinsurance and risk consulting.

Garnier is a haircare and skincare brand, which began with a single product, a plant-based hair lotion, and now has a range of sub-brands across multiple categories. These include Fructis, Ambre Solaire and Nutrisse. In 2018, Fructis launched a new mask range called Hair Food, which used techniques usually used to promote food – fruity images and scents, in a large tub – to highlight the nourishing power of fruity ingredients. In its communications, Garnier highlights its century-long heritage and the blend of natural ingredients used in its products. In mid-2018, Garnier became the first mass-market skincare brand to achieve “Cradle to Cradle” Silver certification for five of the products in its SkinActive line.

In 2017, Michelin won the Road Connect app for developing a new flexible wheel-tire combination, Acorus, to improve comfort by absorbing the impact of potholes. Other recent innovations include the Road 5, the first motorbike tire to use 3D metal printing technology to extend the life of a tire, and the RoadConnect app, developed for truck drivers to help them get real-time traffic information, organize their journeys, and contact other drivers near them. Michelin is inseparable from the Michelin Man character in its logo; he also features in the brand’s communications. Michelin tires are sold in 170 countries through around 4,400 dealers.

Carrefour is a global retailer with more than 12,300 stores and e-commerce sites across Europe, Asia and Latin America. It has more than 5,600 stores in France in a range of formats, including hypermarkets, supermarkets, convenience stores and cash-and-carry outlets. Carrefour has been increasing its investment in online retailing over the past two years, and this year has announced a partnership with Google on a new grocery shopping experience. This will launch in early 2019 using the Google Assistant, Google Home smart speakers, and Google shopping. In its communications, Carrefour encourages consumers to be positive, and to do more with less – reducing waste without compromising on taste or quality. The group has launched Act for Food, a world program to help its customers and employees eat at affordable prices. Carrefour also now guarantees that Carrefour Bio products are all 100 percent French organic, and it has banned 100 controversial substances from all Carrefour food products.
Brand assets are mental shortcuts to cue a brand and activate memories related to communications or past brand experience. Brands can have many different types of brand assets: logos, package shapes, colors, fonts, spokespersons, music or sound, slogans or jingles. All of these elements contribute to what we call a brand’s “imprint”.

A good asset is both readily recognized and uniquely associated with a brand. The most effective ones are instantly associated with their brand whenever they are seen, having formed a deep impression on the brain.

We have learned that shapes and patterns, logos and packaging tend to be more effective in cueing brands than sponsorships, celebrities or slogans. Colors alone can be a strong asset when they are truly distinctive, but are often more effective when also associated with shapes or patterns. Celebrities can act as a brand cue only if there is a good fit with the brand, or when they are emblematic figures of the brand (such as the founder).

The “3Cs” of strong brand assets
Effective brands’ assets respect these three rules: clarity, consistency and communication.

– Clarity comes from a simple use of color, design and packaging, allowing easy decoding and association with the brand
– Consistency is the constant deployment of assets over time across channels and products, drawing on heritage where relevant in order to establish the assets in consumers’ minds
– Communication is the reinforcement of relevant brand messaging: assets act like a reminder of the brand’s key message

It’s no accident that the world’s most valuable brands have great assets: think of McDonald’s and Coke – both are recognized instantly, all over the world.

Reviewing your brand’s imprint could be critical to fueling your brand activation and ensuring long-term success.

*Based on our “Brand Imprint” research: 10,565 interviews, eight countries, 1,390 cues from 228 brands in 28 categories.

In recent years, new business models and breakthrough innovations have revolutionized the consumer market – often leaving only crumbs for traditional players in the affected sectors.

New brands, some of them completely unknown just five years ago, have made their entry with much fanfare in the reputation and attractiveness ranking lists. But at a time when the consumer quest for purpose and authenticity is more intense than ever, legacy brands are well equipped to fight back. They have undeniable assets which they can use to rock the prevailing order – not only by reinventing themselves, but also by building on their uniqueness. In this way, they can win the battle for consumer preference over the long term in our increasingly transient times.

What if heritage brands regained power over disruptors?

Marc Chauchat
General Manager
BCW – Burson Cohn & Wolfe
Marc.Chauchat@bm.com

Serge Biscard
Managing Director – Head of Engagement & Performance Marketing
Ogilvy
Serge.Biscard@ogilvy.com

Cécile Hayat
Head of Brand Strategy
Kantar TNS - Kantar Millward Brown
Cecile.Hayat@kantar.com

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Kantar
Auchan is a family-owned and employee-owned chain of supermarkets, hypermarkets and convenience stores. It operates around 3,600 stores in 17 countries around the world, and has a growing e-commerce presence. It has recently been focusing on smaller format convenience and “ultra-convenience” stores, with 84 percent of recent openings falling into this category, particularly in France and China. In its Vision 2025 strategy, Auchan has announced plans to turn hypermarkets into more than places to shop, with a range of new services, and in-store openings falling into this category, particularly in France and China. In its Vision 2025 strategy, Auchan has announced plans to turn hypermarkets into more than places to shop, with a range of new services, and in-store convenience and “ultra-convenience” stores, with 84 percent of recent openings falling into this category, particularly in France and China.

Renault sold 10.6 million vehicles in 134 countries around the world in 2017. It is the flagship brand of the world’s largest automotive group (excluding heavy trucks), the Renault-Nissan- Mitsubishi Alliance, and is driven by its motto “Passion for Life”, which is behind its development of a range of vehicles which aim to suit every stage of consumers’ lives. In the past year, Renault has been promoting its 4MOTION®SUV, an unprecedented experiential campaign using online influencers to promote its new SUVs. The campaign represents a break from tradition for the automotive sector; the campaign was launched with a TV spot showing real reactions of the online influencers to the new vehicles, and had a large digital component linked to this. Renault positions itself as a pioneer in electric mobility (along with Nissan), and has recently unveiled “Moov’in Paris”, a car-sharing service in the capital launched in association with short-term car rental specialist ADA.

BPN Paribas is a premium global banking and financial services brand, operating in 74 countries. The brand was formed when BNP and Paribas merged in 1966, but parts of the business go back almost 200 years. Since the global financial crisis, it has bought out several other banks, including Fortis in Belgium, BNI in Italy and TEB in Turkey. In its communications, BPN Paribas describes itself as “the bank for a changing world”. BPN Paribas was an early mover in launching an online brand, HelloBnB, which is now popular in France, Belgium and Italy. It also is among the leading European banks for investment in FinTechs (emerging players in the financial services sector), and partners with American business accelerator Plug and Play to support FinTechs at Station F in Paris, the world’s largest incubator of startups. BNP Paribas has adopted the United Nations’ 17 Sustainable Development Goals as part of its CSR strategy. The brand is a prominent sponsor of the film industry and of international tennis tournaments. BNP Paribas will be one of the main sponsors of the 2024 Olympic Games in Paris.

The Dior name represents elegance and timeless femininity in the design of clothing, cosmetics, leather goods, jewelry and watches. Perfume and cosmetics are the main drivers of revenue for the brand, particularly lipstick, though Dior is promoting its fine jewelry in overseas markets, especially China, where it is opening jewelry-exclusive stores and promoting its floral design as engagement rings. In 2018, reinforced the links between its cosmetics and the fashion industry with the launch of the Dior Backstage range – a selection of products designed by Dior makeup artists to help consumers create runway looks. The range began with Légèr Backstage lip products and was extended to include foundation later in the year. It has a lower price point and is therefore more widely accessible than regular Dior cosmetics. Dior has linked with artist and model Sasha Pivovarova on its campaign to highlight the under-representation of women in the history of art, part of a broader, long-running effort to promote feminism.

Total is a global oil and gas producer, as well as a leader in solar energy production. It is also the second-largest global player in the fast-growing liquid natural gas (LNG) industry, thanks to the recent acquisition of Engie LNG. Consumers know the brand best for its network of filling stations, which number 16,000 in 66 countries. Around 3,500 of these service stations – positioned as “one-stop shops” – are in France. Early in 2018, Total launched a global, cross-platform advertising campaign to promote its new Total Quartz range of lubricants. The ads feature a robot called Quartz, who often stars in Total advertising, but this time he is more modern-looking, embodying Total’s research and technology. Also this year, a campaign in France for the Total Access network of filling stations brings back ads first used in 2013 that show in a humorous way that Total stands for great value and top quality. And in more than 30 African countries, Total has launched a new campaign, “Extra Mile”, focusing on the modernity of the network and its services.

Hennessy is the largest-selling brand of cognac in the world, made according to the same processes used by the first master in the 18th century. The original Hennessy product remains unchanged, though new lines have at times been added to the range to meet the changing needs of consumers. Alongside the classic VS, VSOP and the flagship Hennessy XO ranges, the brand periodically offers numbered limited-edition products, due to demand for even greater exclusivity in some of the brand’s newer markets. Advertising is adapted to each country and the target market for different variants. In the US, the rapper Nas promotes VS in a campaign focused on the idea of striving for success, underlined by the slogan “Never Stop Never Settle”. For VSOP, a more premium proposition with an older drinker profile, advertising has focused on the superior distilling process that creates “mastery from the chaos” of nature.
SAINT LAURENT

Moët & Chandon is the world’s leading champagne brand, with a global market share of close to 20 percent. The iconic “Imperial” champagne is also available in rosé, and the recently launched “Ice Impérial” variant is the first champagne designed to be served specifically over ice. Vintages and an extra dry Nectar Imperial Rosé (N.I.R) round out the collection. The brand is strongly associated with the idea of celebration around the world. It was the brand first associated with such moments as launching a new ship, and sprays champagne “rain” from the winner’s podium in motor racing. In June 2018, the brand launched a new signature: “Moët & Chandon … Obviously” reflecting the association with the idea of celebration. Nectar Imperial Rosé (N.I.R) round out the collection. The brand is strongly associated with the idea of celebration around the world. It was the brand first associated with such moments as launching a new ship, and spraying champagne “rain” from the winner’s podium in motor racing. In June 2018, the brand launched a new signature: “Moët & Chandon … Obviously” reflecting the association with the idea of celebration

ACTIVIA

Activia is a range of yogurt products now sold in more than 70 countries. Products are sold in Activia’s distinctive green and white packaging and come in a range of flavors and varieties, including fruit layers, a “light” range, and cereal-containing liquid versions for a quick breakfast. Recently launched flavors include kiwi–lime–aloe vera, and strawberry-raspberry-goji, as well as the new Activia Touch De range of infusion-inspired tastes. The brand is primarily consumed by women, and this is reflected in the brand’s advertising. Following a global campaign encouraging women to “Live in sync” or “Vivre en phase”, Activia launched a new campaign in 2017 presenting the product as a way to help women feel good from the inside out. The “Tout commence à l’intérieur” (“It all starts inside”) global campaign continued into 2018.

CRÉDIT AGRICOLE

Cred Agricole is France’s oldest bank and, due to its support for the agricultural sector, became known as “The Green Bank.” It provides consumer and business banking and insurance, and in late 2017 launched a 100 percent mobile-based banking service, called Eko. In its advertising, Cred Agricole promises: “Cred Agricole, toute une banque pour vous” (Cred Agricole, a whole bank for you). The past year has been a strong one for Cred Agricole, posting an 8.9 percent rise in net profit, and making significant expansion moves across Europe. The group has taken a minority stake in the Italian bank Credicard, and will partner on the distribution of savings and pension products. Credit Agricole has also bought three regional savings banks in northern Italy. And in May last year, Cred Agricole Consumer Finance announced a partnership with Spanish bank Bankia.

DECAHaTON

Decathlon is a global sporting goods retailer whose mission is to “champion the athlete in everyone,” whether a novice or an expert, by offering quality equipment at low prices. It has over 300 stores in France, which account for around a third of sales, and more than 1,400 in 43 countries worldwide. It stocks a range of international brands as well as its own brands, which include Quechuas, Kalenji, Tribord and B’Twin – which present innovative designs developed in-house. Decathlon registers up to 40 patents per year, to sustain its position as an innovator. It is also innovating in store, with the Decathlon Essential and Decathlon City formats developed for urban consumers, and an increasing focus on digital shopping, both online and through tablet-equipped staff in stores. Decathlon’s tagline in its advertising is “Fully fit”, and the brand tends to highlight the high quality and low prices that the brand can offer.

Decathlon is owned by the Mulliez and Leclercq families, which own a range of retail brands.
Trust has always been an important matter for a brand: without it, there is no sustainable business. Our BrandZ™ database shows that when brands aren’t trusted, they are less desirable to consumers and they fail to command a premium. But today, only one in four people around the world claims to trust brands at all.

Traditionally, trust has resulted in consumer loyalty. But in disruptive times, brands are asking people to do something new and risky: try new products or services, give access to more personal data, and trust new brands. Building trust in something new requires brands to play by a different set of rules than those seeking simply to maintain trust.

How does trust work?
Global investigation by Kantar TNS enables us to define trust according to what we call the “Three Is” framework: integrity, identification, and inclusion.

**Integrity** is the foundation of trust; it is doing what you promise. Brands need to find ways to clearly signal that they do this. This means creating consistent experiences for consumers, and owning their mistakes when promises are broken, but in an environment where it has become so much more difficult to assess integrity, this is no longer enough. The human touch is required.

**Identification** means establishing a connection at a human level. We are hard-wired to trust people who are similar or familiar to us. Hence, brands wanting to be trusted should act as humans do, i.e. be real, vulnerable and transparent, showing flexibility and signaling their own values.

Finally, **inclusion** allows brands to go one step further by building a sense of kinship: treating consumers as equals, celebrating their loyalty and actively enabling trust, for example by providing proactive advice on how to stay safe online.

**Inspiring a leap of faith**
Trust is generally seen by marketers as a consequence of doing things right. But in a disruptive environment it is important to have a proactive strategy. Radical change requires radical action to inspire a leap of faith in riskier times. The Three Is framework shows brands how to do this, by adopting the simple principles that lead to one human being to trust another.

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**Retail disruption: a consumer experience customized to . . . you!**

Retail disruption is happening all around us: nearly every fast-fashion brand has its own website, so you can order online from the comfort of your couch. This has become the new normal, so what’s really so disruptive about retailing these days?

What’s groundbreaking in the current dynamic is retail brands providing benefits and experiences that matter to consumers and satisfy their needs – just at the right moment. This is what allows us as consumers to choose exactly how we want to shop. Maybe today we want to immerse ourselves in a brand experience, like in L’Appartement Sézane in Paris, or in the Gucci flagship in Soho, NYC. And if we feel like shopping differently tomorrow, we can.

Or perhaps you want to buy a used item, but eBay doesn’t do the trick any more? You want to see the product in person and pick it up off the shelf? Leclerc, one of the biggest grocery distribution chains in France, has now opened a supermarket for second-hand goods, with over 4,500 square feet dedicated to items like vacuum cleaners, games, phones and more.

Or maybe you still love doing your food shopping in an actual store, but can’t stand the queues at the cashier. Now there is Amazon Go, in Seattle. Drop things into your basket and just walk out the door, with payment made automatically, of course.

Whatever mood you are in or whatever experience you seek, retail has an answer. A bespoke solution for the most important consumer: you.
Séphora is a trendy chain of high-end cosmetics stores with around 500 outlets in Europe, and 2,300 in 33 countries worldwide. Stores offer a luxurious environment, and there is a strong focus on service and staff expertise. The brand has been rolling out its Séphora Studio retail concept – small stores that generate an “inclusive, neighborhood feel” with more personalized experiences. The brand has been collaborating with the San Francisco-based startup Pinrose, which aims to reimagine the way people shop for fragrance, using a personalized algorithm to match customers with the perfume that is scientifically best suited to them. The collaboration has led to the release of a collection of limited-edition scented glitter lip glosses. Séphora management has described the partnership as one based on shared goals of creating high-quality, accessible products that are fun and unique. Séphora has started offering free in-store beauty classes for trans people, led by their own trans members of staff.

Société Générale is a retail bank with more than 2,000 branches in France, and 31 million clients worldwide, including individuals, professionals and business customers. The bank offers a range of financial services, with a growing emphasis on digital options. Innovation is one of the four core values of Société Générale, and fostering a digital culture that supports clients’ experience of the bank is at the heart of this. In its communications in the past year, Société Générale has focused on digital innovations such as credit cards with cryptocurrencies, and Apple Pay. Société Générale positions the bank’s advisors as trusted partners who can guide clients in the more complex aspects of their banking needs, while offering solutions to help clients complete more basic interactions with the bank independently. Société Générale is a sponsor of the 2019 Rugby World Cup.

Givenchy is a high-end fashion house with a daring style much loved by celebrities. It operates around 50 stores worldwide. The brand’s artistic director, Clare Waight Keller, custom-designed the wedding gown worn by royal bride Meghan Markle in May 2018, and Givenchy dressed entertainers Beyoncé and Jay Z for their On the Run II mid-year tour. Romy from the band “The xx” performed at the Paris launch of the Givenchy World Tour collection, the first by Waight Keller, who is the brand’s first female artistic director. Givenchy has recently launched Givenchy Kids, its first children’s ready-to-wear line, for Fall/Winter 2017-2018. With signature designs in miniature, a touch of streetwear inspiration and couture dresses, the house’s classic wardrobe has been shrunk for little ones.

Veuve Clicquot is a champagne brand known globally for the distinctive yellow label of its flagship product, “Le Brut Carte Jaune”. The range also spans other products and collections, designed to meet the needs of consumers on different occasions; these include Rosé, Rich and Grande Dame. Veuve Clicquot sells through large retailers as well as the hospitality trade, where it offers high levels of training and merchandising, with branded flutes and serving buckets. Veuve Clicquot sponsors high-end cultural and sporting events, such as the Veuve Clicquot Polo Classic, which this year took place in Manhattan. The brand’s namesake, Barbe-Nicole Ponsardin Clicquot, is the widow of the brand’s founder, and the woman this year took place in Manhattan. The brand’s namesake, Barbe-Nicole Ponsardin Clicquot, is the widow of the brand’s founder, and the woman who took over the business aged just 27 when her father died. Inspired by Madame Clicquot’s entrepreneurial spirit, the brand runs the annual “Veuve Clicquot Business Woman Award” in 27 countries.
Evian mineral water, sourced from the Alps near the town of Evian, has become a global brand long associated with purity and health. New products in the Evian range include Evian-infused Kusmi Tea, which comes in several flavors, along with limited-edition packaging with a Disney theme, and a Paris collection. Another Evian line was devised by the blogger-influencer Chiara Ferragni. Since 2009, the brand has urged consumers to “Live Young” through its advertising, with humorous ads showing babies dress as adults. The latest incarnation of this campaign is called “Oversize” and includes a Disney theme, and a Paris collection.

The gas and electricity supplier Engie has been re-positioning itself as a supplier of low-carbon energy, with a focus on solar production and more efficient ways of getting power to the people who use it. Engie is the solar-energy leader in France, with 900 MWP of capacity. The business is expanding into airport services and facilities management, and is devising innovative solutions for its end consumers. These include the My Power offer, which works through a smart battery to automatically adjust loading and unloading of solar energy according to the weather and an individual household’s consumption habits. It has also launched ENGIEHarmonyProject, a series of initiatives around the world in which Engie employees and partners pursue projects supporting sustainability.

Ricard is an anise-flavored spirit, traditionally consumed in mixed drinks as an aperitif. Its logo echoes the origins of the brand, which was developed under the Marseilles sun. Growth of 13 percent in net profit for 2017-18 came largely from heightened demand in China and India. In 2018, Ricard launched Ricard Plantes Fraîches, a new pastis made exclusively with anise from plants grown in Haute-Provence. It also now offers Ricard-branded products online, such as limited-edition bottles and boxes. In a nod to environmental concerns, Ricard has announced that none of its drinks should be served with plastic straws. The brand is making digital innovation a priority, calling it “connected friendliness.” Ricard advertising tends to play with the idea of color, given than Ricard changes color depending what it is mixed with.
The race for banks to reach a critical size has dominated the financial market for many years, most notably to meet financial ratios following the 2008 crisis. Size has also proven to be essential to funding updates to IT systems, and to training financial advisors in a changing environment where they are no longer the main source of information for consumers.

But the size of a business alone does not necessarily deliver additional value to the consumer, and doesn’t help them choose a provider. This is why it is so important for financial services businesses to build a strong and meaningful brand, with a clear USP. This is an area that some banks have neglected: for this, they could pay the ultimate price, as the market changes and regulators are opening the door to new players.

PSD2: a Pandora’s box

The PSD2 – second Payment Service Directive – designed by the European Union to simultaneously open and regulate the exchange of information between banks and tech companies, will take full effect in September 2019. It will break down the banks’ monopoly on their users’ data, allowing non-banks to propose innovative, customized services to consumers. Traditional banks risk becoming nothing more than the holder of a bank account, facing increasing churn rates, while newcomers to the sector – FinTechs and most importantly Big Techs such as Amazon, Google or Apple – will own the relationship with consumers, and gain the associated value.

Meaningful banking brands will be in a better position to embrace the inevitable change. Like other large banks, they will benefit from having a large existing portfolio and strong salience (their brand is readily recognized by consumers). But, more importantly, by having a commitment to their brand purpose and having made a specific promise to customers, it will be easier for them to explain why they are adapting the way they work and why they are still relevant to consumers. This will reinforce their relationship and lead them to benefit from new sources of revenue.

The risk of complacency

Of course, banking has seen many changes in its history, and big retail banks have regularly adapted, successively developing services through call centers, Minitel, websites and mobile apps. They successfully competed against new online banks that were supposed to revolutionize the banking market, by developing “me too” services that offered the same convenience, or by taking them over.

But past success could lead many banks to underestimate the scale of change now under way. Those that fail to adapt not just their services but potentially their entire business model, risk disappearing altogether.

Jean-Christophe Chantereau
Brand Strategy Director, Finance
Kantar TNS - Kantar Millward Brown
Jean-Christophe.Chantereau@kantar.com

KANTAR

Clock ticking for banks that don’t stand for something
Peugeot is a motoring brand with a range extending from compact to family-size, luxury and sports utility vehicles, sold in around 160 countries. The all-new 3008 and 5008 SUVs have been strong sellers in Europe and have pushed the brand product mix upmarket. The 3008 was Europe's 2017 Car of the Year at the Geneva Motor Show. Peugeot now hopes to re-energize the premium end of the car market. New models and updates include digital i-cockpit dashboards. Encouraged by new creative director Hedi Slimane, who in February 2018 took over from British designer Phoebe Philo. The "Paris La Nuit" ("Paris by night") collection featured Slimane's trademark emphasis on black, a unisex range, and what Celine described as a "non-seasonal" collection. It also included a handbag called 16, named after Celine's headquarters, at 16 rue Vivenne, in Paris. Lady Gaga is endorsing the 16. Slimane has changed the Celine logo, deleting the sharp accent on the "E" and adopting black capital letters on a white background in what the company said on Instagram was a more pure, 60s-inspired design. Celine has been part of the LVMH group since 1996.

Celine is a French brand of ready-to-wear and luxury leather goods, with nearly 150 stores worldwide and a distribution network through selected high-end department stores such as Barneys New York, Harrods and Galeries Lafayette. The brand recently launched its first collection under new creative director Hedi Slimane, who in February 2018 took over from British designer Phoebe Philo. The "Paris La Nuit" ("Paris by night") collection featured Slimane's trademark emphasis on black, a unisex range, and what Celine described as a "non-seasonal" collection. It also included a handbag called 16, named after Celine's headquarters, at 16 rue Vivenne, in Paris. Lady Gaga is endorsing the 16. Slimane has changed the Celine logo, deleting the sharp accent on the "E" and adopting black capital letters on a white background in what the company said on Instagram was a more pure, 60s-inspired design. Celine has been part of the LVMH group since 1996.

Volvic is a premium brand of bottled water sold in more than 60 countries worldwide. It has a volcano on the label and attributes its mineral composition to filtration through volcanic rock. In 2017, a new global advertising campaign was launched using the tagline “Réveille ton volcan” (“Find your volcano”). The message is that, just like a volcano, we all have inner strength within us that needs to be awakened. To emphasize this point, Volvic has made long-distance trail runner Kilian Jornet its global brand ambassador. Volvic has launched a new organic Aquadrink range. It has also launched Volvic Infusion Bio, a range of three drinks inspired by three of the world’s most famous volcanoes: Kilimanjaro and Piton de la Fournaise. The brand is also promoting its Volvic Infusion Bio, a range of three flavors. Perrier updated its iconic film of almost three decades ago, “The Lion”, directed by Jean-Paul Goude. The new version, this time directed by Johnny Green, features a girl and a lion cub rather than a woman and an adult lion, to highlight the smaller bubbles.
Van Cleef & Arpels is a luxury watch and jewelry brand. Its first international store was opened in Palm Beach in 1940, and there are now more than 100 around the world. The brand has long been a celebrity favorite, with Marlene Dietrich, Grace Kelly and Maria Callas among the famous fans of its designs. Van Cleef & Arpels is known for its patented “Mystery Set” way of setting precious stones so that they appear to be free-standing. The four-leaf clover shape that is now the brand’s emblem comes from the Alhambra collection, launched in 1940. Culture and experience are at the heart of Van Cleef & Arpels communications; an exhibition experience are at the heart of Van Cleef & Arpels.

Martell is the second-biggest-selling cognac in the world, after Hennessy. In its communications, Martell uses the signature “Excellence since 1715”, and the brand seeks to represent three characteristics: elegance, complexity and balance. The personality and expertise of Martell’s cellar masters often feature in its communications. China is a key market for Martell, and the business has had to reorganize since a government ban on extravagant spending and official banquets. It has therefore sought to focus on the intermediate category (VSOP), positioned between the entry-level VS and the most expensive XO, to target the expanding ranks of the middle classes, especially young professionals. Parent company Pernod Ricard has strengthened its agreements with digital giants Baidu, Alibaba and Tencent, and is using online content to adapt to local consumers in different markets. A L’Occitane pop-up café has been part of Groupe SEB since 1968. The group owns other cookware brands, as well as an extensive selection of its “86Champs” concept store in Paris, another is opening at 555 Fifth Avenue, New York, which is at once highly digitized and pays homage to the brand’s roots in Provence. In recent months, L’Occitane has been developing a creative approach to retail, which can be adapted to local consumers in different markets. A L’Occitane pop-up café has launched in Singapore in collaboration with award-winning Asian pastry chef Janice Wong. In the US, L’Occitane en Provence has launched the Occi Truck, a store on wheels; and in Toronto, suspended capsules are used to infuse drinks and mists by controlling temperatures and cooking times. It includes a recipe book, and further recipes will be made available on the Tefal mobile app. Tefal has been part of Groupe SEB since 1968. The group owns other cookware brands, including Moulinex and Krups.

Carte D’Or is a dessert ice cream brand available in over 25 varieties. It is available in nine countries. With the tagline “Once you’ve got Carte D’Or, you’ve got dessert,” the brand positions itself as the brand of high-end frozen desserts. In 2014, a range of pastry-based products inspired by classic French desserts was launched, including profiteroles, crème brûlée and lemon meringue pie. In 2016 and 2017, a new advertising campaign featuring a symphony of ingredients included in these desserts was aired. A new organic range launched in 2018. Summer promotional activity has included the opening of a Maison Carte D’Or pop-up store in Paris. Launched in collaboration with award-winning pastry chef Yannick Tranchant, it offered a fresh take on traditional French pastries, all featuring a contemporary twist thanks to the inclusion of Carte D’Or ice cream.

Tefal is a cookware and small appliance manufacturer, which takes its name from the words “Teflon” and “aluminium.” It is best known for its non-stick cookware and for providing innovative products at affordable prices. The range includes breadmakers, steamers and yoghurt makers, as well as an extensive selection of pans. Tefal has almost 150 patents around the world, and its products are sold in 144 countries. The brand positions itself as a helpful companion to people who want to simplify their lives and enjoy great food with those they love. In September 2018, Tefal launched Cake Factory, a new appliance that makes it easier to bake cakes and muffins by controlling temperatures and cooking times. It includes a recipe book, and further recipes will be made available on the Tefal mobile app.

Citroën has grown from being one of France’s biggest carmakers into a global brand, available in 90 countries. Its cars can even be ordered online in several markets: France, the UK and Brazil for now, with a broader rollout expected in future. Chtoën’s brand promise is “Inspired by you”, and development tends to focus on technology and creativity that improves the motoring experience both for drivers and passengers. New model launches in 2018 include the third-generation Berlingo, Citroën’s small multi-purpose vehicle, following the launch last year of a new C5 Aircross and a new C4 Cactus compact hatchback. The growing Chinese market is especially important to Citroën, and the brand’s product strategy is designed with this in mind. Citroën innovations include the Rent&Smile and Earn&Drive mobility services, along with the recently launched SEEETROËN eye glasses, which the company promotes as a remedy for motion sickness.
Maison du Monde is an international chain of home decorating and furnishing stores, with 313 branches – 212 of them in France – in seven countries. It also has 11 e-commerce websites, and operates purely online in the UK, the Netherlands, Portugal and Austria. Beginning with just four stores a little over 20 years ago, it has grown into a business generating over €1 billion in sales per year (2017); 21 percent of sales are online, and over one-third are from outside France. The selection spans indoor, outdoor, junior and B2B, and ranges from industrial, vintage and classic designs to the latest trends, with new products introduced every three weeks. The network is expanding, with new store openings in France, planned for premium locations in city centers and shopping malls. There are also plans to open between 80 and 95 new international stores by 2020, mainly in markets where it already operates.

Air France is the country’s flag carrier, serving 328 destinations in 118 countries. While the brand is now part of Air France-KLM and the SkyTeam alliance of airlines, it maintains a distinctly French brand, proud of its heritage and that of France. Since 2016, Air France has positioned itself using the tagline “France is in the Air”, promoting French elegance, refined cabins on long-haul routes, and restaurant-style French cuisine. A series of six digital advertisements was launched in March 2018 to illustrate the pleasure of travelling “à la française”, while in the US, the brand has been running a campaign “Take a chance, or fly Air France”, reminding passengers of the little extras that make a big difference between simply getting there, and flying in style. In 2018, Air France-KLM appointed former Air Canada chief operating officer Benjamin Smith as its first non-French chief executive, to revitalize Air France and direct strategy across Air France-KLM.
brand building
best practices
Does digital stifle or inspire brands’ visual codes?

“Everybody falls in line!” This was the cynical tweet from Californian studio Oh No Type earlier this year. They were responding to the recently redrawn logos of Airbnb, Spotify and Pinterest, which all looked strangely similar. All featured sans-serif type with very similar curves and color palettes. Why were these billion-dollar companies, all geniuses of branding, suddenly so similar in their visual identity? And is the result deeply boring, or have they hit on something awesome?

Simplification: fault or force of digital?

These logos are the latest evidence of the global phenomenon of simplification, and these giant brands are far from alone in having yielded to the diktat of the sketch. The minimalism of these logos represents the will to convey the simplicity of using the sites and apps they represent. They have taken the same approach to graphics because they want to present their offer as names, and at least one is now a verb that’s come to beyond their usual area of expertise, commenting on ideas or topics that are important to them. The one made for Hillary Clinton was especially interesting. At first it was criticized for its simplicity, and few identified its real potential. Anyone could draw it, but this meant, most importantly, that it could be adapted depending on current events, from Gay Pride to Thanksgiving.

In the end, choose not to choose

It is interesting to note that Google has chosen not to choose between the two approaches. Its streamlined logo with its bold colors is simple, yet the “Google doodle” – illustrations, animations or games designed in an ad hoc way to celebrate certain events – makes the brand come alive.

There is only rule: stay the same, while being different. Be challenged by the constraints of digital, but also inspired by the possibilities.

Camille Yvinec
Co-Managing Director & Strategy Director
Superunion
Camille.Yvinec@superunion.com

An augmented reality of possibilities

While digital brings us challenges, including the risk that we oversimplify everything, we must recognize it also brings benefits. It has reminded us that a logo cannot and must not say everything: it can never contain the entire personality of a brand.

Moreover, some brands have brilliantly benefited from technology in their use of visual signals. Sonos made an impact in 2015 when its pulsating logo was released. Imagine an animated design that reproduces the vibration of a speaker cabinet when you scramble the identity. The optical illusion has given elegant life to this brand of hi-fi systems. Another trend that has taken full flight thanks to digital is that of “logo systems”, inspired by “organic logos” or “flexible logos” of Tate Modern. For example, the idea of existing, rather than having a static expression, prefer to create a graphic framework and take it from there. The framework adapts and changes depending on the situation, allowing brands to start conversation beyond their usual area of expertise, commenting on ideas or topics that are important to them. The one made for Hillary Clinton was especially interesting. At first it was criticized for its simplicity, and few identified its real potential. Anyone could draw it, but this meant, most importantly, that it could be adapted depending on current events, from Gay Pride to Thanksgiving.

Media integration

Kantar Millward Brown’s “AddReaction: The art of integration” report finds that a substantial proportion of marketing campaigns are not well integrated. They fail to use the same executional idea across channels, meaning they miss out on the chance to benefit from cross-media synergies, which are particularly important for new campaigns.

Analysis of our CrossMedia database finds that integrated campaigns have over 30 percent more impact than unIntegrated campaigns. But, the real benefit comes from taking the same idea and customizing the executions to work well in each channel. Such campaigns generate over 50 percent more impact.

Fast feedback

But things can of course fail to go according to plan. Whilst everyone hopes a new initiative or campaign will work, even Amazon’s Jeff Bezos recognizes that sometimes, efforts can go off-piste, but “If you’re good at course correcting, being wrong may be less costly than you think, whereas being slow is going to be expensive for sure”.

Fast feedback is therefore essential when brands are targeting disruptive communications if they place the brand’s core promise or platform at the heart of all marketing efforts. Think Red Bull “Gives you wings”, and their association with Felix Baumgartner’s Supersonic Freefall, or Skip’s “Dirt is Good” and their partnership with schools across the globe to create “Outdoor Classroom Day”.

Brands can also increase their chances of developing successfully disruptive communications if they place the brand’s core promise or platform at the heart of all marketing efforts. Think Red Bull “Gives you wings”, and their association with Felix Baumgartner’s Supersonic Freefall, or Skip’s “Dirt is Good” and their partnership with schools across the globe to create “Outdoor Classroom Day”.

Shake it up – unleash your creativity!

Megan Savage
Director Knowledge & Best Practice (Comms)
Kantar TNS – Kantar Millward Brown
Megan.Savage@millwardbrown.com

You cannot disrupt the status quo if no one knows what you have to offer. Disruptive brands do not advertise, the pundits say. They don’t have to; the media are more than happy to promote them. But, once they become established or the competition catches up, they turn to advertising. Google, Netflix and Amazon all now advertise their services.

And the sad truth is, unless you are lucky enough to work in a category like mobile phones or sneakers, few people are interested in your brand. So even if your brand does or offers something that is disruptive or meaningfully different, it will be more likely to be talked about than the competition… but only so much. Most conventional brands will still need to find a way to publicize what they have to offer.

Creating an impact

Indeed, you can have the greatest proposition in the world but, unless you can draw attention to it with strong marketing, it will not deliver growth. Our learnings have shown that, for established brands, investing in high quality creative is most likely to impact revenue in the short-term, followed by media integration and then budget allocation.

Investing in high quality creative means developing advertising that cuts through, is linked to your brand, and builds brand associations and desire. It is this “effective” share of voice that best explains changes in share, not simply the absolute levels of media spend.

One of the strongest defining characteristics of effective, award-winning campaigns is that people find them to be different from other ads. The ads themselves create a sense of disruption, something unexpected, they stand out from the crowd and make people want to talk about them. On average, strong campaigns generate nearly 11 times more tweets per dollar invested than do weak campaigns.

Superunion
Superunion is a next-generation brand agency built on a spirit of creative optimism. We use upstream creativity to build brands that unite people and organizations.

www.superunion.com

Kantar
Kantar is the world’s leading data, insight and consultancy company. We know more about how people live, feel, shop, vote, watch and post worldwide than any other company.

www.kantar.com

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Stepping away from an established communications strategy is not easy, but if your existing campaign cannot lend itself to the task of perceived disruption, it may be better to make the change; provided there is due diligence to ensure such change will be effective.
Redistributing power in the new connected ecosystem

We are on the brink of a digital rebellion, in which consumers might increasingly reject many of the ways in which technology has come to rule their lives. It’s been a long time brewing.

El Dorado - Disruption
Our relationship with digital began with El Dorado. It promised so much, we almost couldn’t believe it. Free access to culture and information; we could order a pair of shoes at midnight from our bed; and if we had no sense of direction, we just had to follow a blue ball on a screen.

We could now chat with friends, and with their friends. We could express ourselves without waiting to be asked our opinion. Great!

As “platforms” developed online, we vaguely wondered what business model these companies were using, but were so happy and busy that we let the platforms shape the web.

Then we realized that digital was no longer a new channel – a different ecosystem. It had become the ecosystem. Then we talked about disruption.

Disruption? As philosopher Bernard Stiegler says, this is a word for “being late”. We suddenly realized that we were all late. That’s why, since then, we have been talking about digital transformation as a necessity.

Meanwhile, Facebook has bought WhatsApp and Instagram, and Microsoft has strengthened ties with Linkedin and Skype...

Schizophrenia - Cognitive Dissonance
Suddenly, we are in a time of schizophrenia, a form of cognitive dissonance. We realize that digital brought us a lot, but that it took a lot from us, too, like our data and our attention. And we realize that some of these companies, these platforms, contribute little in taxes.

But it is too late to do much about it, because we cannot manage without them. The result for us is anxiety, especially as we look to the future and see artificial intelligence on the way. Look at Amazon’s recent purchase of a home security and camera company. Soon, Amazon will be in our homes, even when we’re not there. And we will likely worry even more.

Resistance
How are we reacting to all this? Resistance behaviors are beginning to appear, strengthened by organizations seeking to keep these platforms on the straight and narrow. The European Commissioner for Competition, Margrethe Vestager, has become a guardian of European consumers, who themselves are downloading ad blockers and looking to “Digital Detox.” Resistance is becoming stronger.

Regulation
But we don’t want to throw out the baby with the bath water; digital progress has given us much that we now don’t want to be without. Logic suggests we must therefore regulate.

We are becoming more judicious in how we behave as digital individuals, and businesses, too, are beginning to understand that just because something is technically possible doesn’t mean they should do it. Think of a brand using programmatic advertising to retarget us for weeks with a product or service – even if we’ve already bought it. Digital can be used in a more mature, more reasoned, more targeted and therefore smarter way. The notion of the ecology of attention will gradually emerge to replace that of the economy of attention. The platforms will have to change, as they are already starting to do. And institutions are also starting to regulate, as with the EU’s General Data Protection Regulation (GDPR).

Reinvention
But change can go much further; we can fundamentally change the paradigm. At first the web was libertarian, it was alternative, it was free. It has gradually become akin to the oil industry. Just as the oil industry has commoditized the Earth, digital capitalism has started to commoditize humans. We understand that when a service is free, then we are the product – or at least our data is the way we pay for it. But a silent revolution is being prepared as people, individually and collectively, are starting to overcome and bypass this system. They are consuming more carefully, getting together to produce their electricity or run yard sales, and this kind of effort is going to gather momentum. Technology, such as blockchain, will allow them to organize without an intermediary. The next revolution will make sure consumers, currently mere targets of brands, are soon very likely to become their main competitors.

Guénaëlle Gault
Global Head of Digital
Kantar Public
Guenaelle.Gault@kantar.com
Brands have long been using celebrities in their advertising to give them a voice that speaks on their behalf. What’s new now is that brands are “speaking” to consumers through voice-activated assistants.

Successful examples of this in action so far include Colgate’s “Chompers” for Alexa, the crocodile accompanying children throughout their toothbrushing ritual with a story, and Mastercard’s “Fortune favors the Bold”, a free podcast discussing the future of money and imagining a cash-free world, hosted by author Ashley C. Ford. In the beauty sector, Sephora has launched a Google Home app that allows users to book a treatment directly through an interactive voice command, and gives them access to some of the brand’s influencers’ tutorials.

The vocal branding market has a bright future ahead, but only if it’s designed effectively, voice pathologist Wendy LeBorgne said in her TEDxCincinnati talk in February 2018. “Your voice is the most important element in your personal brand,” she said. This is especially the case when addressing people in their private space. “How far can you go?” is still a pending question.

What’s encouraging is this: a J. Walter Thompson study among users of voice-activated assistants found 72 percent expect brands to have their own, specific voice - and not use the generic Amazon or Google voice. Brands should therefore start working on their “voice branding” as soon as they can.

Flowers, tiles, catchy taglines in neon light, raw materials, colorful cakes and drinks. What do they have in common? They’re all key components of a successful Instagram post.

Instagram has more than 800 million active users (November 2017), and 80 percent of these people use the platform to follow brands, while 60 percent discover new products through the app. Such has been the success of Instagram that it has become an adjective: “Instagrammable”, which the Urban Dictionary defines as: “A picture or photo that is worth posting on Instagram”.

When it comes to Instagramming food, you can’t just design for a happy palate; you need to consider all five senses, and especially sight. Liberty, Benoît Castel’s famous French bakery, foresaw the trend in 2014. Their manifesto was avant-garde for its time, stating clearly their desire to “reconcile craft and sales”. When you buy a loaf of bread or a croissant at Liberté, you can witness the process, from the kneading to the box.

Supermoon Bakehouse in New York opened last autumn with some inspiration from its French counterpart. Luminescent boxes, a glass window allowing customers to watch bakers à l’œuvre, and visual experiences specifically designed to be photographed, are driving Instagrammers crazy. With its 55,000 followers, the bakery sells more than caramel salted croissants and soft ice creams. “Each serve comes in a hypercolor color-changing cup and spoon that change color with heat and cold,” the Supermoon website explains, illustrated with shots that make desserts look as luxurious as jewelry. The bakery stands as a perfect example of a successful marriage of design and food porn.

This phenomenon is mainly true for the food and beverage industry, but it’s not limited to it. As long ago as late 2016, we saw how Apple was using a minimalist, back-to-nature theme in its stores, planting trees between long wooden tables displaying their latest MacBook Pros and iPhones. The past year has seen an increasing number of similarly styled so-called “hipster” restaurants, cafés and bakeries all major cities. London’s Elan Café and Sketch are probably the most representative examples of this up-and-coming global trend. Pink velvet chairs, egg-shaped toilets, flowers and picturesque neon wall lights are attracting Instagrammers with their hashtags at the ready. These two hotspots alone have generated 15,700 and 46,000 posts respectively.

Michael Tran, creator of the food center HWKR, opened last February in Melbourne, knows a fair bit about Instagram-friendly aesthetics. The place has been shortlisted for the Australian Interior Design Awards 2018 in the hospitality category. Tran says designed the center with the needs of Instagram and Instagrammers top of mind.

Reflecting on this trend, it’s important to remember there are risks involved in betting everything on superficial factors. When consumers consider brands, authenticity still rules, so it might not be worth risking your brand’s point of differentiation just for a few extra likes on Instagram. Yes, if you want to sell food, you need to cook for the eyes – but not at all costs.
resources
INTRODUCTION

The brands that appear in this report are the most valuable French brands.

They were selected for inclusion in the BrandZ™ Top 50 Most Valuable French Brands 2019 based on the unique and objective BrandZ™ brand valuation methodology that combines extensive and on-going consumer insights with rigorous financial analysis.

The BrandZ™ valuation methodology can be uniquely distinguished from its competitors by the way we use consumer viewpoints to assess brand equity, as we strongly believe that how consumers perceive and feel about a brand determines its success and failure. We conduct worldwide, ongoing, in-depth quantitative consumer research, and build up a global picture of brands on a category-by-category and market-by-market basis.

Globally, our research covers 3.6 million consumers and more than 120,000 different brands in over 50 markets. This intensive, in-market consumer research differentiates the BrandZ™ methodology from competitors that rely solely on a panel of “experts”, or purely on financial and market desktop research.

Before reviewing the details of this methodology, consider these three fundamental questions: why brand important; why is brand valuation important; and what makes BrandZ™ the definitive brand valuation tool?

Importance of Brand

Brands embody a core promise of values and benefits consistently delivered. Brands provide the signposts we need to navigate the consumer and B2B landscapes.

At the heart of a brand’s value is its ability to appeal to relevant customers and potential customers. BrandZ™ uniquely measures this appeal and validates it against actual sales performance. Brands that succeed in creating the greatest attraction power are those that are:

- **Meaningful**
  In any category, these brands appeal more, generate greater “love” and meet the individual’s expectations and needs.

- **Different**
  These brands are unique in a positive way and “set the trends”, staying ahead of the curve for the benefit of the consumer.

- **Salient**
  They come spontaneously to mind as the brand of choice for key needs.

Importance of Brand Valuation

Brand valuation is a metric that quantifies the worth of these powerful but intangible corporate assets. It enables brand owners, the investment community and others to evaluate and compare brands and make faster and better-informed decisions.

Brand valuation also enables marketing professionals to quantify their achievements in driving business growth with brands, and to celebrate these achievements in the boardroom.

Distinction of BrandZ™

BrandZ™ is the only brand valuation tool that peels away all of the financial and other components of brand value and gets to the core — how much brand alone contributes to corporate value. This core, what we call Brand Contribution, differentiates BrandZ™.

THE VALUATION PROCESS

**Step 1: Calculating Financial Value**

**Part A**

We start with the corporation. In some cases, a corporation owns only one brand. All Corporate Earnings come from that brand. In other cases, a corporation owns many brands, and we need to apportion the earnings of the corporation across a portfolio of brands.

To make sure we attribute the correct portion of Corporate Earnings to each brand, we analyze financial information from annual reports and other sources, including Kantar Consulting. This analysis yields a metric we call the Attribution Rate.

We multiply Corporate Earnings by the Attribution Rate to arrive at Branded Earnings, the amount of Corporate Earnings attributed to a particular brand. If the Attribution Rate of a brand is 50 percent, for example, then half the Corporate Earnings are identified as coming from that brand.

**Part B**

What happened in the past — or even what’s happening today — is less important than prospects for future earnings. Predicting future earnings requires adding another component to our BrandZ™ formula. This component assesses future earnings prospects as a multiple of current earnings. We call this component the Brand Multiple. It’s similar to the calculation used by financial analysts to determine the market value of stocks (Example: 6X earnings or 12X earnings). Information supplied by Bloomberg data helps us calculate a Brand Multiple. We take the Branded Earnings and multiply that number by the Brand Multiple to arrive at what we call Financial Value.

**Step 2: Calculating Brand Contribution**

So now we have got from the total value of the corporation to the part that is the branded value of the business. But this branded business value is still not quite the core that we are after. To arrive at Brand Value, we need to peel away a few more layers, such as the in-market and logistical factors that influence the value of the branded business, for example: price, availability and distribution.

What we are after is the value of the intangible asset of the brand itself that exists in the minds of consumers. That means we have to assess the ability of brand associations in consumers’ minds to deliver sales by predisposing consumers to choose the brand or pay more for it.

We focus on the three aspects of brands that we know make people buy more and pay more for brands: being Meaningful (a combination of emotional and rational affinity), being Different (or at least feeling that way to consumers), and being Salient (coming to mind quickly and easily as the answer when people are making category purchases).

We identify the purchase volume and any extra price premium delivered by these brand associations. We call this unique role played by brand, Brand Contribution.

Now we take the Financial Value and multiply it by Brand Contribution, which is expressed as a percentage of Financial Value. The result is Brand Value. Brand Value is the dollar amount a brand contributes to the overall value of a corporation. Isolating and measuring this intangible asset reveals an additional source of shareholder value that otherwise would not be measured.

**Eligibility Criteria**

Each of the brands included in the BrandZ™ Top 50 Most Valuable French Brands 2019 must meet the following criteria:

- The brand originated in France
- And is owned by a publicly listed company traded on a credible stock exchange, or its financials are available in the public domain.
All brand valuation methodologies are similar – up to a point.

All methodologies use financial research and sophisticated mathematical formulas to calculate current and future earnings that can be attributed directly to a brand rather than to the corporation. This exercise produces an important but incomplete picture.

What’s missing? The picture of the brand at this point lacks input from the people whose opinions are most important – the consumer. This is where the BrandZ™ methodology and the methodologies of our competitors part company.

How does the competition determine the consumer view? Interbrand derives the consumer point of view from panels of experts who contribute their opinions. The Brand Finance methodology employs a complicated accounting method called Royalty Relief Valuation.

Why is the BrandZ™ Methodology Superior? BrandZ™ goes much further and is more relevant. Once we have the important, but incomplete, financial picture of the brand, we communicate with consumers, people who are actually paying for brands every day, constantly. Our on-going, in-depth quantitative research includes over three and a half million consumers and more than 120,000 brands in over 50 markets worldwide.

What’s the BrandZ™ Benefit? The BrandZ™ methodology produces important benefits for two broad audiences.

- Members of the financial community, including analysts, shareholders, investors and C-suite, depend on BrandZ™ for the most reliable and accurate brand value information available.
- Brand owners turn to BrandZ™ to more deeply understand the causal links between brand strength, sales and profits, and to translate those insights into strategies for building brand equity and fuelling business growth.
Now BrandZ™ gives you the ability to do the same for your brand of choice

The BrandZ™ Brand Genome visualizes your brand’s “genome” on a page, with all the genome sequence measures providing an instant overview of your brand.

The ultimate tool for a new business pitch and a lot more

Brand Genome is a unique BrandZ™ tool, exclusive to WPP. It’s free, available 24/7 and takes just seconds to create.

Visit http://genome-measures.wppbrandz.com/ where you will be able to find out about each of the BrandZ™ measures, what they are, how they are calculated and how you can access a report which contains the measure.

To download a sample genome map visit: http://wppwrap.com/bg.pdf
BrandZ™ Genome Mapping
The Science Behind Our Art

Only available via your WPP Agency

TrustR
Consumer trust and advocacy are both important for brand growth but the combination of the two is the real sweet spot. TrustR examines this relationship in detail.

RepZ
Maximize brand and corporate integrity using four key factors to drive reputation: success, fairness, responsibility and trust.

Vitality Quotient (vQ)
Diagnose a brand’s health based on five elements that are proven to grow brand value: purpose, innovation, communication, brand experience, and love.

InnovationZ
Evaluate a brand’s perceived innovative power, what drives it and why it’s important. Discover sector-relevant real-time innovation and startup ideas, sourced via the exclusive Springwise global network of spotters.

CharacterZ
This innovative deck allows you to diagnose brand character and delve into the dynamics, clarity and consistency of a brand’s personality.

PitchDoctor
Everything you need to know about your brand’s strengths, weaknesses, opportunities and threats in one easy-to-digest page.

StoryTeller
An interactive data visualization tool to allow anyone to create story-led insights on how to build and maintain brand equity.

SocialZ
SocialZ is a real-time social media analytics dashboard that allows you to take a deep dive into the world of real-time consumer sentiment around the world.

WebZ
Analyze how traffic is driven to a brand’s website, understand audience demographics and gain insights into viewer trends.

CelebrityZ
Evaluate the fit between brands and a celebrity or social influencer.

Going Global?

WE WROTE THE BOOK

BrandZ™ Country Reports: Essential Travel Guides For Global Brand Building

Our BrandZ™ country reports contain unparalleled market knowledge, insights, and thought leadership about the world’s most exciting markets. You’ll find, in one place, the wisdom of WPP brand building experts from all regions, plus the unique consumer insights derived from our proprietary BrandZ™ database.

BrandZ™ Top 50 Most Valuable French Brands 2019
brandz.com/report/france

BrandZ™ Top 75 Most Valuable Global Retail Brands 2018
brandz.com/report/global

BrandZ™ Top 75 Most Valuable Indian Brands 2018
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BrandZ™ Top 30 Most Valuable Spanish Brands 2017
brandz.com/region/spain

BrandZ™ Top 100 Most Valuable US Brands 2019
brandz.com/region/us

BrandZ™ Top 75 Most Valuable US Brands 2019
brandz.com/region/us
IN-DEPTH BRAND-BUILDING INTELLIGENCE ABOUT TODAY'S CHINA

The opportunity to build brands in China is greater than ever. But so are the challenges.

The fastest growth is happening deep in the country, in less well-known cities and towns. Consumers are more sophisticated and expect brands to deliver high-quality products and services that show real understanding of local market needs.

WPP has been in China for over 40 years. We know the Chinese market in all its diversity and complexity. This experience has gone into our series of BrandZ™ China reports. They will help you avoid mistakes and benefit from the examples of successful brand builders.

Spotlight on Cuba
Cuba is a market unparalleled both in the Caribbean region and the world. Brand awareness among Cubans is high, but gaining access to them uniquely challenging. Now is the time to plan your Cuba strategy.

brandz.com/article/spotlight-on-cuba

Spotlight on Mongolia
Mongolia’s GDP has grown at rates as high as 17 percent in recent years, encouraging a growing number of international brands to gravitate toward this fast growth market and make a beeline for one of Asia’s hidden gems.

brandz.com/article/spotlight-on-mongolia

Unmasking the Individual Chinese Investor
brandz.com/article/unmasking-the-individual-chinese-investor-report

The Power and Potential of the Chinese Dream
brandz.com/article/chinese-dream-report

The Chinese Golden Weeks in Fast Growth Cities
brandz.com/article/chinese-golden-weeks-report

The Chinese New Year in Next Growth cities
brandz.com/article/chinese-new-year-report

Looking East
WPP Company Contributors

BAV

BAV is a global consultancy with expertise in consumer insights and brand marketing strategy. Using BrandAsset® Valuator, a proprietary brand management tool and global database of consumer perceptions of brands, BAV informs strategic and creative solutions that drive business results. Over 25 years, BAV has captured data and consumer insights on more than 60,000 brands in 50 countries around the world, evaluating 75 brand image and equity dimensions that matter. BAV Group is a unit of VMLY&R.

www.bavgroup.com
Anna Blender
Deputy Managing Director, France
Anna.Blender@bavgroup.com

BCW

BCW is one of the world’s largest full-service global communications agencies. Founded by the merger of Burson-Marsteller and Cohn & Wolfe, BCW delivers digitally and data-driven creative content and integrated communications programs grounded in earned media and scaled across all channels for clients in the B2B, consumer, corporate, crisis management, CSR, healthcare, public affairs and technology sectors. BCW is a part of WPP (NYSE: WPP), the world’s leader in communications services.

www.bcw-global.com
Donna Imperato
CEO
Donna.Imperato@cohnwolfe.com

GroupM

GroupM France has dedicated structures: Data & Analytics (Media Marketing, Efficiency, Data Management), StudioM (content creation), Connect (digital teams). GroupM France employs nearly 1,000 people. In 2016, GroupM France invested nearly € 1.5 billion in the media on behalf of its clients. Worldwide, nearly 1,900 people. In 2016, GroupM France invested nearly €1.5 billion in the media on behalf of its clients. Worldwide, nearly 1,900 people. GroupM brings together WPP media agencies: Kinetic (Media Planning), MEC (Agency of record), MediaLink (Media Consulting), Mindshare (Media Planning), MediaCom (Media Planning), Young & Rubicam (Media Planning). GroupM France has dedicated structures: Data & Analytics (Media Marketing, Efficiency, Data Management), StudioM (content creation), Connect (digital teams). GroupM France employs nearly 1,000 people. In 2016, GroupM France invested nearly € 1.5 billion in the media on behalf of its clients. Worldwide, nearly 1,900 people. GroupM France brings together WPP media agencies: Kinetic (Media Planning), MEC (Agency of record), MediaLink (Media Consulting), Mindshare (Media Planning), MediaCom (Media Planning), Young & Rubicam (Media Planning). GroupM France is a global media agency with more than 100 offices worldwide. In France, Mindshare is led by Magali Florens, CEO, and has 130 employees. Mindshare deploys an agile and flexible media approach that allows brands to respond quickly to changing environments. This approach, the Adaptive Media strategy, relies on the exploitation of the "fast and slow data" to identify actuations insights and a fully integrated organization On/Off. Among clients are Unilever, Chanel, Ford, Booking.com, Nike, Ubisoft, Sanofi, and Fox.

www.mediacom.com
Leslie Feegey
Head of Strategy
Leslie.Feegey@mediacom.com

J. Walter Thompson (JWT) has been the world’s best-known marketing communications brand for over 154 years. Headquartered in NYC, JWT is a true global network, with more than 200 offices in over 90 countries, employing nearly 10,000 innovators. Known for our award-winning work and leading initiatives, JWT was the first agency to air a TV commercial, the first to establish a global advertising presence and the first to hire a female copywriter. While we reimagine the future for our clients, we will continue to break new ground and revolutionize the power of our legacy through the campaigns that we create.

www.jwt.com
Virgile Brodziak
Managing Director, France
Virgile.Brodziak@jwt.com

Ogilvy

Ogilvy is an award-winning integrated creative network that makes brands matter for Fortune Global 500 companies as well as local businesses across 131 offices in 83 countries. The company creates experiences, design and communications that shape every aspect of a brand’s needs through six core capabilities: Brand Strategy, Advertising, Customer Engagement and Commerce, PR and Influence, Digital Transformation, and Partnerships.

www.ogilvy.com
Natalie Rastoin
President, France
Natalie.Rastoin@ogilvy.com

Top 50 Most Valuable French Brands 2019

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For the full list of the Top 50 Most Valuable French Brands 2019, please visit www.top50frenchbrands.com.
superunion

Superunion is a next-generation brand agency built on a spirit of creative optimism. We use upstream creativity to build brands that unite people and organizations. We are experts in brand strategy, identity, communications, brand engagement, reputation, and brand management. We are a truly global agency of 750 people, with 23 offices in 18 countries, working with clients including Aetna, Airbus, Bank of America Merrill Lynch, Colgate-Palmolive, Dell, Deloitte, Diageo, FIFA, Ford, iAG, Land Rover, Nestle, Pfizer, Prudential, Tesco, and Vodafone.

www.superunion.com
Camille Yvinec
Co-Managing Director & Strategy Director
Camille.Yvinec@superunion.com

The Store is a global retail practice of WPP, specializing in providing expertise, support and added value to client initiatives in retail dynamics. The Store is a knowledge hub, built to help clients navigate through insights for consumers, retailing, marketing and sales activation, and technology. The Store is also a host of global workshops that bring together retailing and branding experts to share their vision and expertise for future growth.

www.thestore.wpp.com
David Roth
CEO, EMEA & Asia
David.Roth@wpp.com

VMLY&R is a global marketing agency with more than 7,000 employees worldwide with principal offices in Kansas City, London, New York, São Paulo, Shanghai, Singapore and Sydney. VMLY&R works with client partners including Colgate-Palmolive, Danone, Dell, Ford, Office Depot, PepsiCo, Pfizer and Wendy’s.

Cecile Lejeune
President, France
Cecile.Lejeune@yr.com

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To learn more about how to obtain valuable insights applicable to all business areas contact:

Laurent Guillaume
Chairman, Kantar
Laurent.Guillaume@kantar.com
Ketty de Falco
CEO, Kantar TNS - Kantar Millward Brown
Ketty.de-Falco@kantar.com
Pierre Gomy
Managing Director Brand & Communication, Kantar TNS - Kantar Millward Brown
Pierre.Gomy@kantar.com

You can also keep updated on the latest news and studies from the Kantar network in France through the Kantar portal: fr.kantar.com or twitter.com/kantar

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Kantar Millward Brown specializes in advertising, marketing communications, media, digital and brand equity research, and works with 90 percent of the world’s leading brands. The key area of the company’s focus is brand strategy, creative development, channel optimization and brand performance. With offices in 55 countries, Kantar Millward Brown understands the importance of both a global and local focus - and understands consumers. We know brands that are meaningfully different capture more volume share, command premiums and grow their value.

www.millwardbrown.com
Pierre Gomy
Managing Director Brand & Communication, France
Pierre.Gomy@kantarmillwardbrown.com
Ketty de Falco
CEO, France
Ketty.de-Falco@kantar.com

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We are a global leader in connected intelligence. Our data and insights provide clients with a holistic understanding of the changing media landscape. Our global coverage and local expertise enable clients to better understand media audiences and their relationships with brands to optimize investment. Where others see a fragmented reality, we see new opportunities.

www.kantarmedia.com
Denis Gaucher
CEO, France
Denis.Gaucher@kantarmedia.com

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www.tnsglobal.com
Pierre Gomy
Managing Director Brand & Communication, France
Pierre.Gomy@kantar.com
Ketty de Falco
CEO, France
Ketty.de-Falco@kantar.com

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www.lightspeedresearch.com
Caroline Frankum
CEO
Caroline.Frankum@lightspeedresearch.com

KANTAR PUBLIC
Kantar Public works with its clients around the world to build a better public realm. We advise on public policy, service delivery, and communications. We partner our clients with teams that bring local expertise as well as global best practice. We work as consultants, advisors, and researchers, to more than 40 governments, as well as leading universities, NGOs and corporations. Our breadth of expertise is unrivalled, and supported by our unique, global proprietary infrastructure, we are able to provide the data and analytics to support better decision-making.

www.kantar.com/public
Emmanuel Riviere
Managing Director, France
Emmanuel.Riviere@kantarpublic.com
WPP in France

We help build valuable brands.

WPP is the world leader in communications services. The company provides a comprehensive range of services including digital, ecommerce & shopper marketing; advertising & media investment management; data investment management; public relations & public affairs; brand consulting; health & wellness communications; and specialist communications.

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Mathieu Morgensztern
Country Manager, WPP & GroupM, CEO
Mathieu.Morgensztern@wpp.com

Sebastien Ott
Commercial Director, WPP
Sebastien.Ott@wpp.com

For further information about WPP companies worldwide, please visit: www.wpp.com

or contact:

David Roth
CEO The Store, WPP EMEA and Asia
David.Roth@wpp.com
WPP Company Brand Building Experts

These individuals from WPP companies provided additional thought leadership, research, analysis and insight to the report:

Serge Biscard
Ogilvy

Virgile Brodziak
J. Walter Thompson

Marc Chauchat
BCW - Burson Cohn & Wolfe

Jean-Christophe Chantereau
Kantar TNS - Kantar Millward Brown

Christophe Manceau
Kantar Media

Mathieu Morgensztern
WPP & GroupM

Vadin Poulet
J. Walter Thompson

Patricia Powers
Kantar TNS - Kantar Millward Brown

Claire Gallon
Ogilvy Consulting

Guénaëlle Gault
Kantar Public

Batoul Hassoun
Ogilvy Consulting

Cécile Hayat
Kantar TNS - Kantar Millward Brown

Emma Roberts
Kantar TNS - Kantar Millward Brown

Audrey Rouzies
J. Walter Thompson

Megan Savage
Kantar TNS - Kantar Millward Brown

Adam Smith
GroupM

Cyril Joumier
Kantar TNS - Kantar Millward Brown

Camille Yvinec
Superunion
The French Top 50 Team

These individuals created the report, providing research, valuations, analysis and insights, editorial, photography, production, marketing and communications.

François Baradat
François Baradat is the Marketing and Communications Director in France for Kantar Millward Brown, Kantar Public and Kantar TNS. François is a specialist in brand strategy, innovation and change management. Along with the team he actively promotes BrandZ™ France among the marketing community in France.

Amandine Bavent
Amandine Bavent is a BrandZ™ Valuation Director for Kantar Millward Brown. She manages the brand valuation projects for BrandZ™. Her role involves conducting financial analysis, researching brands and performing valuations.

Jo Bowman
A journalist for 20 years, Jo Bowman worked for newspapers in Australia before moving to Hong Kong to specialize in business writing with a focus on Asian branding and marketing. She has since worked in Italy and the UK, as a writer and editorial consultant.

Elspeth Cheung
Elspeth Cheung is the Global BrandZ™ Valuation Director for Kantar Millward Brown. She is responsible for valuation, analysis, client management and external communication for the BrandZ™ rankings and other ad hoc brand valuation projects.

David Roth
David Roth is the CEO of the Store WPP for Europe, the Middle East, Africa and Asia, and leads the BrandZ™ worldwide project. Prior to joining WPP, David was main Board Director of the international retailer B&Q.

Graham Staplehurst
Graham Staplehurst is a senior director with over 30 years’ research experience in Kantar, specializing in brand & communications strategy. Graham is global director for strategy on BrandZ™.

Lucy Edgar
Lucy Edgar is the Global Marketing Manager at Kantar Millward Brown where she is responsible for the PR, marketing and communications on the BrandZ™ projects.

Pierre Gomy
Pierre Gomy is Managing Director of Kantar TNS and Kantar Millward Brown in France, leading Brand & Communication Expertise. He ensures that the team delivers on its mission: to help brands grow by delivering meaningful impact.

Florence Maninet
Florence Maninet is Marketing and Communications Manager in France. Along with Pierre Gomy, and François Baradat, she actively promotes the BrandZ™ Top 50 report among the marketing community in France.

Paul Reiffer
Paul is a multi-award winning British photographer, who has travelled the world capturing people, commercial images and limited-edition fine art landscape photography. www.paulreiffer.com

Peter Walsh
Peter Walsh is Global Strategy Director of BrandZ™ and was involved in the creation of this brand equity and insight tool two decades ago. He has contributed to all the valuation studies and developed BrandZ™ metrics, including CharacterZ, TrustR, and RepZ.

Doreen Wang
Doreen Wang is the Global Head of BrandZ™ at Kantar Millward Brown, and a seasoned executive with over 18 years’ experience in providing outstanding market research and strategic consulting for senior executives in Fortune 500 companies in both the US and China.

Jo Bowman
A journalist for 20 years, Jo Bowman worked for newspapers in Australia before moving to Hong Kong to specialize in business writing with a focus on Asian branding and marketing. She has since worked in Italy and the UK, as a writer and editorial consultant.

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The consumer viewpoint is derived from the BrandZ™ database. Established in 1998 and constantly updated, this database of brand analytics and equity is the world’s largest, containing over three and a half million consumer interviews about more than 120,000 different brands in over 50 markets.

For further information about BrandZ™ contact any WPP Group company or:

Doreen Wang
Global Head of BrandZ™
Kantar Millward Brown
+1 212 548 7231
Doreen.Wang@kantarmillwardbrown.com

Elspeth Cheung
Global BrandZ™ Valuation Director
Kantar Millward Brown
+44 (0) 207 126 5174
Elspeth.Cheung@kantarmillwardbrown.com

Martin Guerrieria
Global BrandZ™ Research Director
Kantar Millward Brown
+44 (0) 207 126 5073
Martin.Guerrieria@kantarmillwardbrown.com

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