

DYNAMIC ADAPTABILITY

THE NEW IMPERATIVE FOR BRAND GROWTH

JULY 2025

WELCOME

TO OUR 2025 MEANINGFUL BRANDS™ WHITE PAPER

The year 2025, in many ways, marks a watershed for brands and consumers. If 2024 was about upheaval and persistent, iterative disruption—from numerous critical elections to climate change and beyond—then 2025 is that on steroids. A year of unprecedented events, challenges, highs and lows, it demands new—sometimes radical—approaches for people and brands to survive and thrive.

Change is happening at speed. And most brands are failing to keep up. **Apathy** towards brands is high—**people wouldn't care if 78% of brands disappeared overnight**—and most brands are struggling as a result.

Last year's Meaningful Brands™ report, *The Rise of the Change Makers*, identified the emergence of personal **agency**, with people reclaiming control of their lives in the face of ongoing crises. In 2025, this sense of **agency has evolved**—with attitude giving way to action: greater intention, sharper choices, rising expectations.

The most meaningful brands are bold enough to challenge outdated norms, rethink their roles in people's lives, and adapt dynamically—with agility and purpose—shape-shifting to meet and exceed the changing needs of consumers and society at large.

The big macro drivers of change—in industry and beyond—are still present. But the pace of change has accelerated, and new transformational forces are emerging.

Wealth disparity continues to grow at pace, creating new expectations of brands. Climate change continues to produce ever more extreme world events—with the World Economic Forum estimating that climate change now costs economies US\$16 million per hour.

Meanwhile, thanks to TikTok, YouTube, and social media

saturation, cultural and consumer trends are accelerating and being metabolised on a global scale.

And now we must add artificial intelligence to the mix—a force that will transform industries and demand new approaches to talent, work, brands, marketing, and more, with estimates that up to 60% of current jobs will require significant adaptation due to AI (international Monetary Fund).

We are living in an era of advanced, perma-change—where flexibility, adaptiveness, and responsiveness are not just important but imperative to brand growth.

In this fast-paced environment, Havas' Meaningful Brands™ 2025 global study has zeroed in on the idea of **Dynamic Adaptability**—not just as a survival strategy, but as a mandate for growth.

Seventeen years after we first launched this exploration of the relationship between consumers and brands, we are seeing people think and act with greater agency, and with increasingly higher expectations of brands in response to the challenges and uncertainties that surround them.

Winning brands have cracked the code and are embracing behaviours of empathy, fluidity and agility. This emerging group of **dynamic brands** is next-gen: poised for the future and ready for change. They are already moving at pace with culture, consumer, and events. These brands are creating a new playbook for success in this tumultuous moment, and one to which other brands must pay close attention.

If 2024 was about the emergence of personal **agency**, then 2025 is about the **adaptability** that brands must embrace to meet it.

Dynamic adaptability is the new imperative for brand growth.

— **Mark Sinnock**, Global Chief Strategy, Data and Innovation Officer at Havas Creative Network

— **Jo Lawrence**, Global Chief Strategy Officer at Havas Media Network



ABOUT THE MEANINGFUL BRANDS™ STUDY

Commissioned through YouGov in 2025, “Dynamic Adaptability: The New Imperative for Brand Growth” surveyed 93,100 respondents, across 10 markets and 1,898 brands.

Havas has measured Meaningful Brands™ annually since 2009. Now, nearly 17 years into this landmark proprietary study, our Meaningful Brands™ study continues to be a vital sense check about people’s aspirations, guardrails, and expectations of brands.

The methodology examines a brand’s impact and equity based on consumers’ perceptions and expectations across three key pillars—its **personal, functional, and collective benefits** (listed across 40 dimensions and attributes). The most Meaningful Brands™ are the ones performing well on all three metrics.

POWERED BY
YouGov

Interviews:
1,038,000

Citizens:
93,100

Brands:
1,898

Categories:
45

Markets:
10



01

FUNCTIONAL

Rational benefits focused on product functionality, customer service, interactivity, and technology

02

PERSONAL

Messaging and behaviours that connect on an individual basis and serve a specific personal need, want, or feel

03

COLLECTIVE

Company initiatives, actions, and impact that respond and connect on social and cultural levels

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THE BACKDROP

A NEW LANDSCAPE OF EXTREMES





THE BACKDROP:

A NEW LANDSCAPE OF EXTREMES

Stepping into 2025 has meant stepping into a landscape of unrelenting volatility and change. In many ways, change has become the only certainty.

Change can be positive, but our research shows that many people are experiencing it negatively.

- **69%** "The world is going in the wrong direction."

This is perhaps unsurprising, as a sense of crisis is being felt across a range of different areas.

Environment. Climate change is accelerating. There is an 80% chance that global temperatures over the next five years will exceed the warmest on record. According to the IPCC's most recent report on climate adaptation, disasters fuelled by climate change are already worse than scientists initially predicted. Our research shows that people recognise the severity of this situation.

- **73%** "There is an environmental crisis globally."

Politics. Politics is becoming more extreme. More and more countries are witnessing increased polarisation in their political landscapes. Again, our research reflects people's concern about this changing context.

- **58%** "There is a political crisis globally."

Society. Wealth inequality is soaring. Billionaire wealth has surged by US\$2 trillion in 2024, three times faster than the year before. According to the World Inequality Database, in almost all nations, the richest 10% hold more than 50% of personal wealth, while the bottom 50% hold at most 10.4%. Our research illustrates people's concern about this and wider societal issues.

- **56%** "There is a societal crisis globally."

Economics. The G7's GDP growth rate slowed in Q1 2025, from 0.4% to 0.1%. G20 GDP growth is projected to slow in 2025, with a global growth rate of 2.9%, down from 3.3% in 2024. China's once-booming economy is slowing for the first time in years. Global economies are stuttering, and people feel it.

- **50%** "There is an economic crisis globally."

All of this is being supercharged by a new technological revolution in the shape of artificial intelligence, and increasingly quantum computing—set to transform economies, the way we work and

consume, and how brands deliver products, services, and experiences. The global artificial intelligence market is expected to reach US\$1.77 trillion by 2032. In 2025 alone, the market is expected to reach US\$244.22 billion, with a CAGR of 26.60%.

While people are attracted to the potential of this new technology, tensions exist in the minds of the public.

- **58%** "Technology is creating new and exciting possibilities for us as a society." But...
- **37%** "Technology is doing us more harm than good."

People welcome the value of the technology to make their lives easier but show some concern about technology taking the place of human interactions.

- **44%** "Tech advances/AI makes my life more efficient." But...
- **75%** "I prefer to interact with a human rather than AI or digital interface."

And all the while, ethical issues continue to swirl around this technology and its applications.

- **69%** "It is difficult to know what is true and false with the spread of so much disinformation online and in the media."
- **68%** "I believe society should regulate the development of AI technologies to address ethical concerns."
- **66%** "I am more concerned than ever before about how my personal data is used in the digital world."

What once felt like waves of change now feels like a permanent state of motion—with global systems, economies, technology, and culture in constant flux and transformation, growing in scale and impact with every passing moment.

And people are struggling.

- **75%** "I am more cautious today about how I spend my money."
- **64%** "It's difficult to plan for the future when the world is so uncertain."

BRAND APATHY

THE JEOPARDY OF INDIFFERENCE
FACING MARKETERS



Apathy is a state of indifference, a lack of feeling, emotion, interest, or concern.”





APATHY IS THE ENEMY:

BRANDS ARE FAILING TO KEEP UP AND LOSING RELEVANCE

In a world where change has become the norm, the urgency to adapt is growing. The inconvenient truth is that most brands are failing to keep up with the pace and diversity of change influencing both the world and people’s lives. Increasingly, failure to adapt can lead to rapid implosion. The last year has seen major global businesses, from the US to the UK, collapse at unprecedented rates.

Most brands are meaningless – people would not care if 4 out of 5 brands disappeared tomorrow – and the situation is getting worse – up +5 percentage points from 2024.

Speaking to people, we heard the same issues consistently.

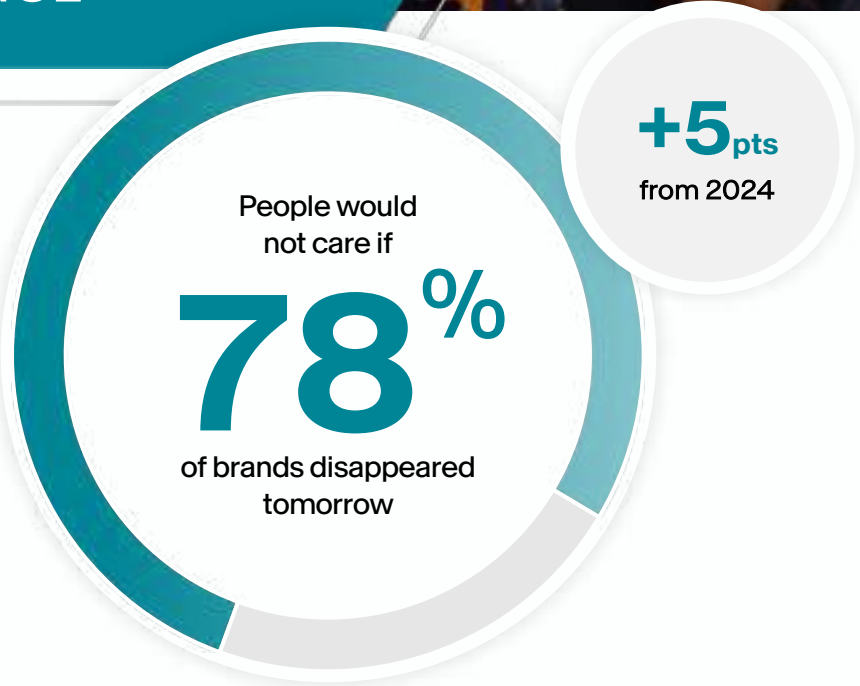
REPETITION

“A lot of brands just repeat the same message and products. It gets dull – I want something that actually feels new.”
Interview respondent

TRANSIENT ENGAGEMENT

“I’m not loyal just for the sake of it, and I don’t get attached to brands – they come and go.”
Interview respondent

This is not just a warning sign—it’s a threat.



S10 MARKET DATA

Country	Indifference
France	92%
Spain	85%
United Kingdom	85%
Italy	80%
United States	76%
Germany	73%
China	62%
Mexico	48%
Brazil	37%
India	16%



APATHY HAS CONSEQUENCES:

PEOPLE LOSE PATIENCE AND LOYALTY EVAPORATES

PEOPLE LOSE PATIENCE

If brands fail to hit the mark or make a misstep, people can easily lose patience with apathy flipping to action. This creates the threat of being cancelled.

61%

"Companies and people face more scrutiny now than ever—where one mistake can mean disaster."

41%

"If I have a negative experience with a brand, I'm quick to share it in a review."

LOYALTY EVAPORATES

Consumers are adopting more pragmatic, fluid purchasing behaviours in this moment—switching to brands that better meet their price and product needs, but also to brands that align more closely with their values.

69%

"I am quick to switch brands if I find a more cost-effective or convenient option."

46%

"I have stopped buying from brands that do not respect the planet or society."

45%

"I have stopped buying from brands that do not have the same views and values as me."

PERSONAL AGENCY

AN EMERGING DESIRE FOR PERSONAL AGENCY



Personal agency is the capacity to act independently, make free choices, and shape one's own life.

It is the sense of being the author of one's actions — guided by intention, autonomy, and the belief in one's ability to create change.”



AN EVOLVING SENSE OF AGENCY: FROM ATTITUDE TO ACTION

AGENCY SIGNALS POTENTIAL FOR BRANDS

People's apathy might be the enemy, but people's rising sense of and demand for agency presents rich opportunities for brands to connect with people across different parts of their lives.

OPTIMISM REMAINS

While people are struggling, they are not feeling defeated. Resilience remains strong, and feelings of control, possibility, and even optimism are widespread.

In 2024, we reported the emergence of a sense of personal agency—and we see this attitude continue into 2025. Indicators of ongoing agency:

HAPPY

65% "How happy are you in your life, in general?"

OPTIMISTIC

57% "How optimistic do you feel about the future?"

HOPEFUL

49% "I feel that my future is bright and full of opportunities."

POSITIVE

49% "My financial future is generally positive."

INTENTIONAL CONSUMERISM RISES

However, we also see something new in 2025. Attitude has given way to action—and with it, a desire for impact and urgency.

People are navigating uncertainty not by pulling back but by filtering forward. They are more selective, informed, and intentional—cutting through noise to invest in what truly matters. Deliberate, value-driven choices are in.

65% Research or save before buying

Only **11%** Make impulse purchases

58% "I make a real effort to buy products that are made or sourced locally."

54% "I will buy a product if it best suits my needs, even if I disagree with the company's views."



CONSCIOUS LIFESTYLE CHOICES BECOME MAINSTREAM

Agency is also extending beyond consumerism into people's lifestyle choices. There is a strong sense of determination in the steps people are taking to self-fortify and lead more connected, sustainable, and happier lives. And far from these being behaviours occurring only among communities at the margins, they are very much part of the mainstream, with widespread adoption amongst the masses.

77% agree with **2+** of these statements



58% agree with **3+** of these statements

Compared to a year ago, people are taking more action to...

52% wasting less products/ food/clothes

51% being more active (physical activity/exercise)

47% making more mindful nutritional choices (e.g. less processed foods, limit alcohol consumption)

43% tracking my health (e.g. sleep, steps)

33% setting better boundaries for work-life balance

31% protecting and spending time in nature with wildlife

30% connecting with people more offline vs online

26% limiting screen time



People are reevaluating what really matters—what is meaningful for them.”

— Jo Lawrence, Global Chief Strategy Officer at Havas Media Network



DEMAND FOR BRANDS TO ENABLE MORE PERSONAL AGENCY

Our definition of agency has expanded from a set of attitudes to encompass a diverse range of behaviours. People's expectations of brands are changing, accelerating, and expanding too.

In 2025, people expect brands to deliver on practical needs as a given—but, increasingly, also on emotional benefits, purpose-driven activities, and innovation. They are inviting brands into different parts of their lives and the systems in which they live, to broaden their mandates and make a bigger difference.

This is creating a new set of needs for people that vary depending on context.



NEEDS AS CONSUMERS

- **64%** "Companies/brands should be dedicated to making my day-to-day life easier."
- **61%** "Companies/brands should help me save time."
- **69%** "Companies/brands should help me save money."

NEEDS AS HUMANS

- **73%** "Companies/brands should show more humanity and generosity when times are tough."
- **71%** "Companies/brands should be doing more to improve and support consumers' health and well-being."



NEEDS AS CITIZENS

- **70%** "Companies/brands should be doing much more for the good of society and the future of our planet—communication is not enough."
- **61%** "Companies/brands should use their power to influence or affect change."



AGREE WITH 1+

"Companies/brands should be dedicated to making my day-to-day life easier."

"Companies/brands should help me save time."

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+

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AGREE WITH 1+

"Companies/brands should be doing much more for the good of society and the future of our planet—communication is not enough."

"Companies/brands should use their power to influence or affect change."

The combination of evolving personal agency and shifting brand expectations reveals an important truth: people are only consumers some of the time. Most of the time, they are simply people getting by; sometimes indulging their passions as members of communities; at other times, caring citizens who support causes and champion change.

Most brands still operate with a static, fixed definition of their audience—centered on transactions, behaviours, and demographics. But to truly keep pace, brands must evolve beyond these legacy definitions, because people are not only customers; they are whole, dynamic humans—and brands must meet them as such.



What is emerging is a 360-degree picture in which brands are scrutinised not just for function and price, but also for a myriad of other criteria that make them desirable.

For example, we see that brands fail to evolve with people's needs and deliver across diverse expectations score below average across key metrics, including:

01 Brand Equity

Overall brand strength: purchase + repurchase + advocacy + overall impression

02 Quality of Life

Perceived value to people's lives

03 Sustainability

Commitment to wider societal and environmental good



People are becoming more intentional and selective about which brands earn their attention, trust, and money," says Seema Patel, Global Managing Director Intelligence at Havas Media Network. "The cost of inertia for brands is clear."

A small group of brands is proving that it is possible not only to survive in this dynamic context, but also to thrive by adapting fluidly to people's diverse needs.

By understanding how these brands achieve this and what makes them special, we can identify lessons from which all brands can learn.

These are **dynamic brands**.

They are not just keeping up with people's changing needs and responding to their growing agency; they are actively creating more value for the whole system in which they operate.

They create more value for business.

They create more value for people.

They create more value for society.

And their power reveals a new imperative for brand growth: **Dynamic Adaptability**.

DYNAMIC ADAPTABILITY

WINNING BRANDS ARE NO LONGER
FIXED BUT FLUID

Dynamic adaptability is a brand's ability to sense change, respond quickly, and evolve continuously—not just in what it says or sells, but in how it shows up in people's lives.

Dynamic brands are willing to challenge old habits, systems, and assumptions to stay culturally relevant and personally meaningful.

Dynamic adaptability is how brands stay ahead, stay human, and stay wanted. It's a set of attitudes and brand behaviours that are becoming more important than ever—not just to survive but to remain relevant to people and in tune with culture.



Dynamic adaptability is not what brands are. It's what brands do," says Mark Sinnock, Global Chief Strategy, Data and Innovation Officer at Havas Creative Network. "Dynamic brands are fluid, not fixed. They are responsive and reactive—moving and shifting around new, emergent needs."





DYNAMIC ADAPTABILITY: AN INTRODUCTION

Dynamic brands are thriving – moving and shifting around new, emergent needs – because they are playing by a different set of rules.

- They treat ‘brand’ as dynamic and fluid, rather than a fixed asset.
- They are open to dialogue – listening, learning and responding to what matters most to different people.
- They create the tools and means to empower people with personal agency.
- They speed up the cycle of listening, creating and executing at speed to dial up relevance.

DYNAMIC ADAPTABILITY MATTERS: PEOPLE CARE



They evolve and stay relevant to me as I change. that’s how they stay in my consideration.”

— Interview respondent



They make me feel like they are really ahead of the curve. they know what’s coming.”

— Interview respondent



That brand really helps me get stuff done when I need it.”

— Interview respondent



It has changed with the times but has always remained true to its identity. that balance is why I still relate to the brand today.”

— Interview respondent

WHAT DOES 'DYNAMIC ADAPTABILITY' MEAN AROUND THE WORLD?

A 'Latin' way to understand 'Dynamic Adaptability' is that the brands that thrive today are the ones that understand that there's no mandatory script for brands to be functional or useful to people. It's about going beyond the obvious and not only recognizing but also celebrating alternate usages of the brand that could be as relevant and important as the main one."

— **Diego Plazas**, Chief Strategy Officer at Havas LATAM



Italian consumers reward brands that can balance innovation with tradition, those able to introduce change without erasing the values and rituals that matter. In the Italian culture where the past is never completely behind us adaptability is both a survival skill and a path to meaningfulness."

— **Francesca Ellena Casadei**, Chief Strategy Officer at Havas Italy



It's not about change for the sake of change. Instead, it's about understanding perfectly which parts of the brand's identity and behaviour need to stay consistent and which need to reflect changing contexts."

— **Sandra Onofri**, Chief Strategy Officer at Havas Germany



'Dynamic Adaptability' means a few things in the US. The ability to pivot and adapt products to meet changing behaviors. The constant state of innovation in certain DTC categories where customer data is driving new products, services and technologies. The agility to move at the same pace as culture and cut through can gain disproportionate share of mind."

— **Jackie Lyons**, Chief Planning Officer at Havas Media Network US



In India, the success of a brand will hinge on their agility, ability to tap into local and cultural contexts, and responsiveness to changing consumer needs."

— **Sanchita Roy**, Chief Strategy Officer at Havas Media India – Mumbai



Brands must constantly understand people's evolving and refined needs to present their offering in the most relevant way. They must also grasp the cultural zeitgeist to demonstrate that they live in the same world as them and share the same values, to create complicity, that famous knowing wink. Both cases require far greater speed and flexibility than that deployed by brands to date."

— **Sebastien Emeriau**, Chief Strategy Officer at Havas Media Group France



In Brazil, 'Dynamic Adaptability' isn't just about speed or flexibility — it's about navigating an increasingly fragmented media culture with cultural fluency and symbolic generosity. Brands today are not epic tales, they are mosaics — consumed in pieces, remixed out of order, and reconstructed through the lens of the audience. And in this mosaic reality, the most relevant brands are no longer those that explain themselves fully, but those that invite participation, spark interpretation, and allow the audience to complete the image."

— **Gustavo Leite**, VP of Strategy at BETC Havas São Paulo, Brazil






THE MOST DYNAMIC BRANDS: TOP BRANDS BY MARKET WITH ATTACHMENT SCORES




This group represents 13% of the brands featured in this study (332 out of 2,594). These brands are not just performing well—they are demonstrating what it looks like to thrive in a complex, fast-moving world. Consequently, people care about these brands—their **sense of attachment to them is 2.3 times higher than for brands in the bottom quartile.**

These brands rank in the **top quartile** across each of our 10 key global markets for three KPIs from our study: **Brand Equity, Quality of Life, and Sustainability.** This range makes them prime examples of Dynamic Adaptability. This is an illustrative list of the most dynamic brands by market.




Brazil

	84.57%
	80.93%
	80.71%

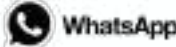


China

	71.92%
	68.11%
	67.94%




France

	70.44%
	70.38%
	63.71%




Germany

	84.11%
	82.63%
	79.76%




India

	88.16%
	86.22%
	84.54%




Italy

	73.11%
	72.71%
	71.55%




Mexico

	90.34%
	90.24%
	83.45%




Spain

	86.63%
	82.39%
	80.70%

United Kingdom

	78.56%
	71.37%
	71.14%

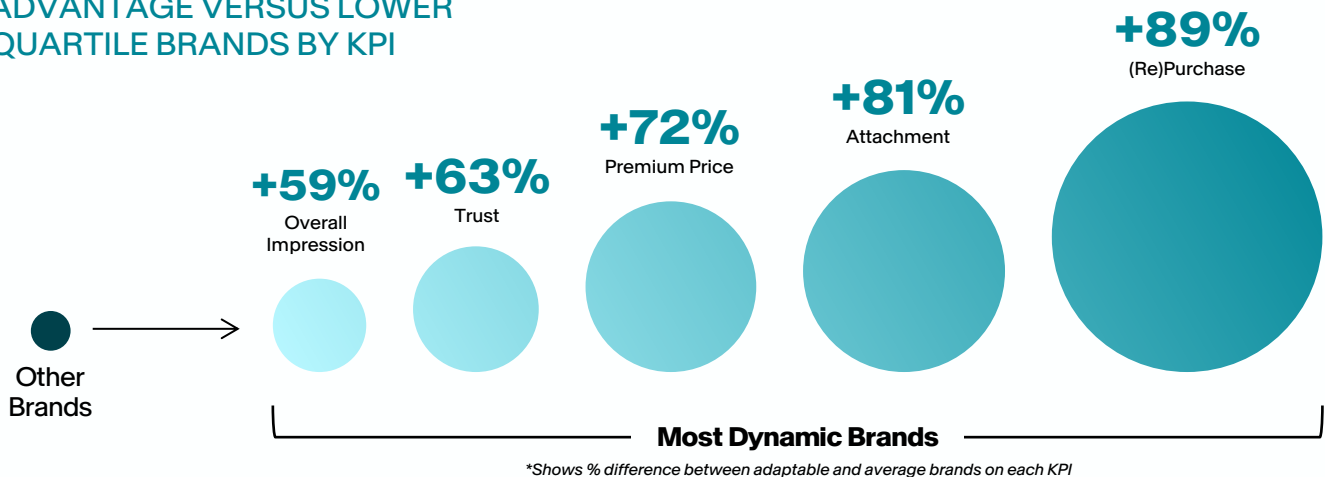
United States

	77.93%
	77.93%
	77.80%

Dynamic brands are not just performing well—they are demonstrating what it looks like to thrive in a complex, fast-moving world, outsmarting, and outmanoeuvring the competition. They are creating a new playbook for which all brands can learn to survive and thrive.

What's more, these brands do not just score in the top quartile for Brand Equity, Quality of Life, and Sustainability; they also outperform across every other KPI we measure—from trust and purchase to premium perception and emotional attachment. Adaptability does not trade off Performance—it multiplies it.

THE MOST DYNAMIC BRANDS: ADVANTAGE VERSUS LOWER QUARTILE BRANDS BY KPI



"The performance of dynamic brands reveals a rare kind of versatility. They are emotionally intelligent, functionally excellent, and socially responsive. They are not just built to last; they're built to flex," says Mark Sinnock.

While dynamic adaptability defines them in our model, their impact goes even further. Globally, 75% of the most dynamic brands also rank amongst the most Meaningful Brands™—showing strong alignment between dynamic adaptability and long-term relevance.

Country	Dynamic Brand Overlap
Brazil	93%
India	93%
United States	82%
Mexico	81%
France	78%
Italy	74%
Spain	70%
China	70%
United Kingdom	68%
Germany	60%
Overlap Globally	75%

*Overlap between top 10% most Meaningful Brands and 10% most Dynamic Brands.



So, what are the new rules of Dynamic Adaptability?

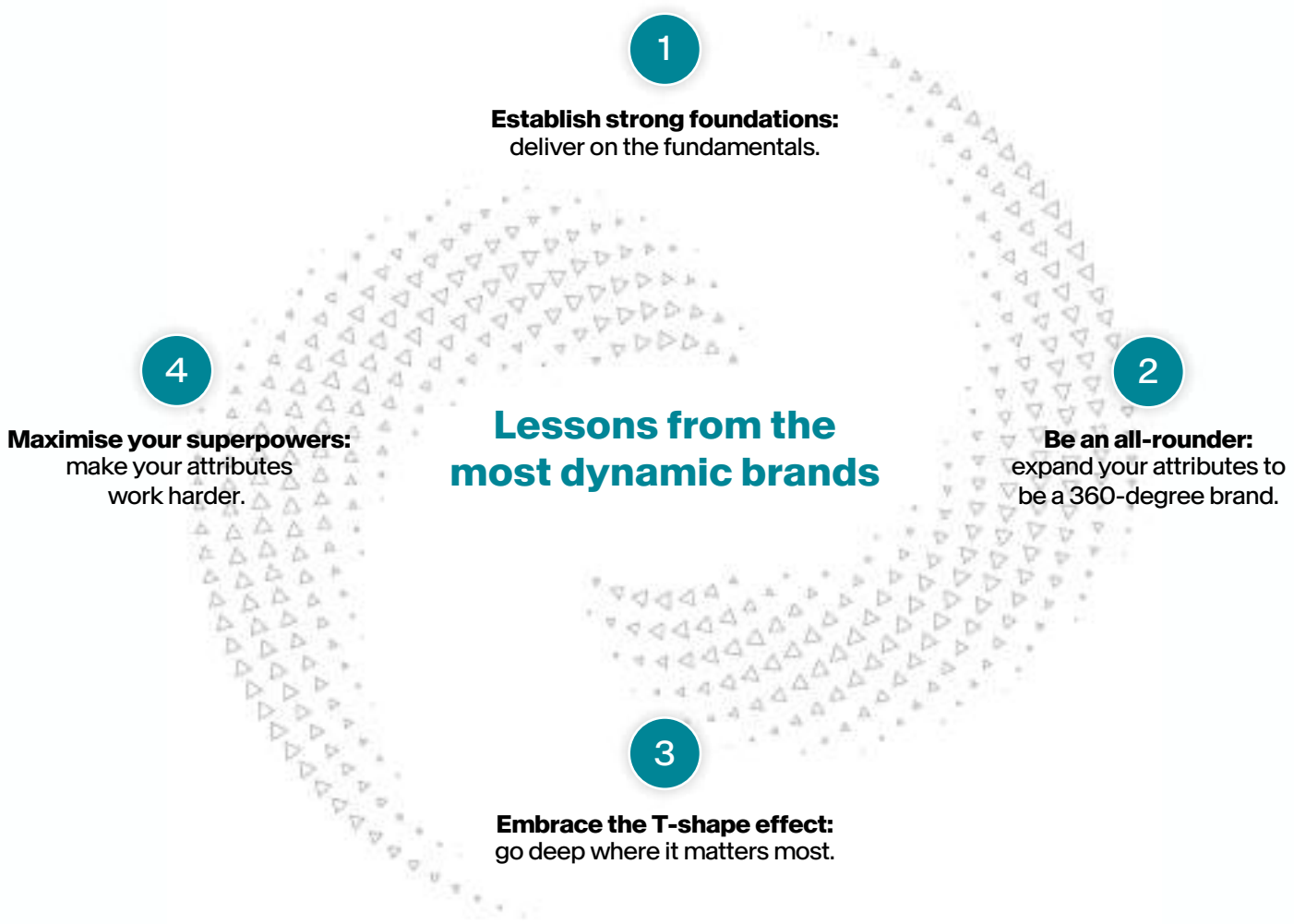
Investigating our group of the most dynamic brands successfully and navigating today's landscape provides some key lessons.

Let's take a closer look at what makes these brands so special.



DYNAMIC ADAPTABILITY: THE NEW PLAYBOOK

Dynamic brands are thriving and enjoying significant advantages over other brands. But how are they doing this? What characteristics enable them to thrive in the current context? What is their playbook? And what lessons can other brands learn from this select group?



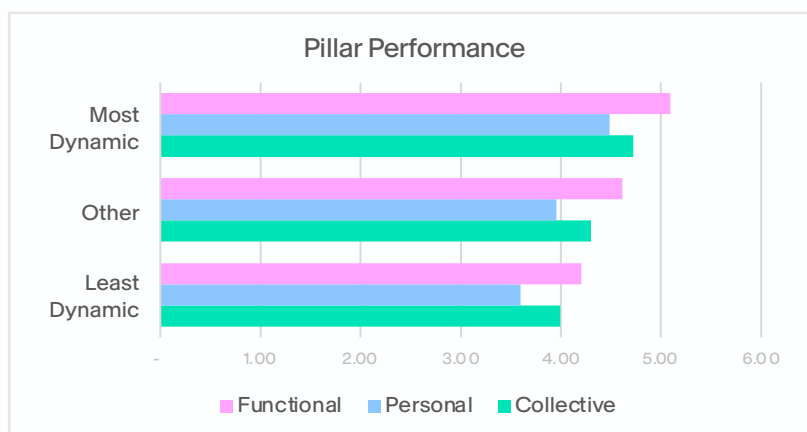
The following analysis compares three groups of brands: the most dynamic brands, the least dynamic brands, and others. These represent brands that sit in different quartiles across our Super 10 markets for Brand Equity, Quality of Life, and Sustainability.

1

ESTABLISH STRONG FOUNDATIONS

Before brands can stretch to meet the full spectrum of people's evolving expectations—from emotional resonance to societal impact—they must first prove themselves where it matters most: delivering on the fundamentals. These foundational experiences are predominantly Functional. Delivering on your core functional promise is key.

We can see this in the pillar performance of people's brand experiences.



The same pattern plays out at a more granular level, with the majority of the top-ranking attributes being Functional.

Across the full range of brands, Havas has identified key attributes consistently ranked highly with strong performance scores. These are the attributes on which brands, regardless of performance tier, tend to deliver well—and which people universally expect; they are becoming core factors in success.

These have become table stakes that signal trust, credibility, and competence. Without them, brands can't show up, earn a seat at the table—let alone grow. They are the foundations of brand performance.

THE TOP 15 ATTRIBUTES RANKED BY PERFORMANCE SCORES

PERFORMANCE					
TOP ATTRIBUTES PERFORMANCE OF THE MOST DYNAMIC BRANDS		TOP ATTRIBUTES PERFORMANCE OF THE OTHER BRANDS		TOP ATTRIBUTES PERFORMANCE OF THE LEAST DYNAMIC BRANDS	
Respect	5.40	Respect	4.97	Respect	4.58
Good Reputation	5.38	Digital Experience	4.83	Digital Experience	4.51
Good Quality	5.34	Safe Products	4.82	Good Employer	4.45
Safe Products	5.27	Good Employer	4.80	Safe Products	4.37
Purchase Experience	5.24	Good Reputation	4.80	Purchase Experience	4.33
Good Employer	5.24	Good Quality	4.80	In-Store Experience	4.30
Digital Experience	5.22	Purchase Experience	4.77	Good Quality	4.28
Leader	5.21	In-Store Experience	4.70	Delivers	4.27
Delivers	5.20	Delivers	4.70	Good Reputation	4.26
In-Store Experience	5.17	Leader	4.60	Inno., Sust., & Ethics	4.18
Range	5.06	Exclusive Experience	4.54	Data Privacy	4.18
Exclusive Experience	5.02	Inno., Sust., & Ethics	4.53	Benefits the Economy	4.15
Inno., Sust., & Ethics	4.98	Range	4.50	Exclusive Experience	4.14
Good Value	4.96	Benefits the Economy	4.48	Good Value	4.12
Benefits the Economy	4.93	Good Value	4.45	Range	4.08

Grouping the attributes illustrates key building blocks for establishing strong foundations for brand performance.

ATTRIBUTES	BUILDING BLOCKS
Good Reputation	REPUTATION & TRUST
Respect	
Good Employer	
Quality Products	PRODUCT CONFIDENCE
Safe Products	
Innovative, Sustainable & Ethical Solutions	
Purchase Experience	CUSTOMER EXPERIENCE
Digital Experience	
In-store Experience	
Delivers	
Exclusive Experiences	
Range	BRAND PRESENCE
Good Value	
Benefits the Economy	

These building blocks define a brand's baseline credibility—the ability to meet essential needs reliably and responsibly. They may not set a brand apart, but they determine its longevity and, as we shall see, provide a functional basis to innovate and adapt.



BRAND EXAMPLE

Google

ESTABLISH STRONG FOUNDATIONS: DELIVER ON THE FUNDAMENTALS



Google leads its category in Functional performance, reflecting its strength in delivering reliable and high-quality digital services.



Its performance on "Quality Products" is 56% higher than the country average, reinforcing trust in its offerings.



It ranks #1 for Functional attributes among 232 brands in France, showing clear leadership in meeting core consumer expectations.



It exceeds the national benchmark by 54% on "Good Reputation," signaling strong brand perception and loyalty.



Google scores 20% above the national average in Functional attributes—underscoring its standout role in the French market.



It scores 41% above average on "Safe Products," highlighting consumer confidence in its privacy and security standards.

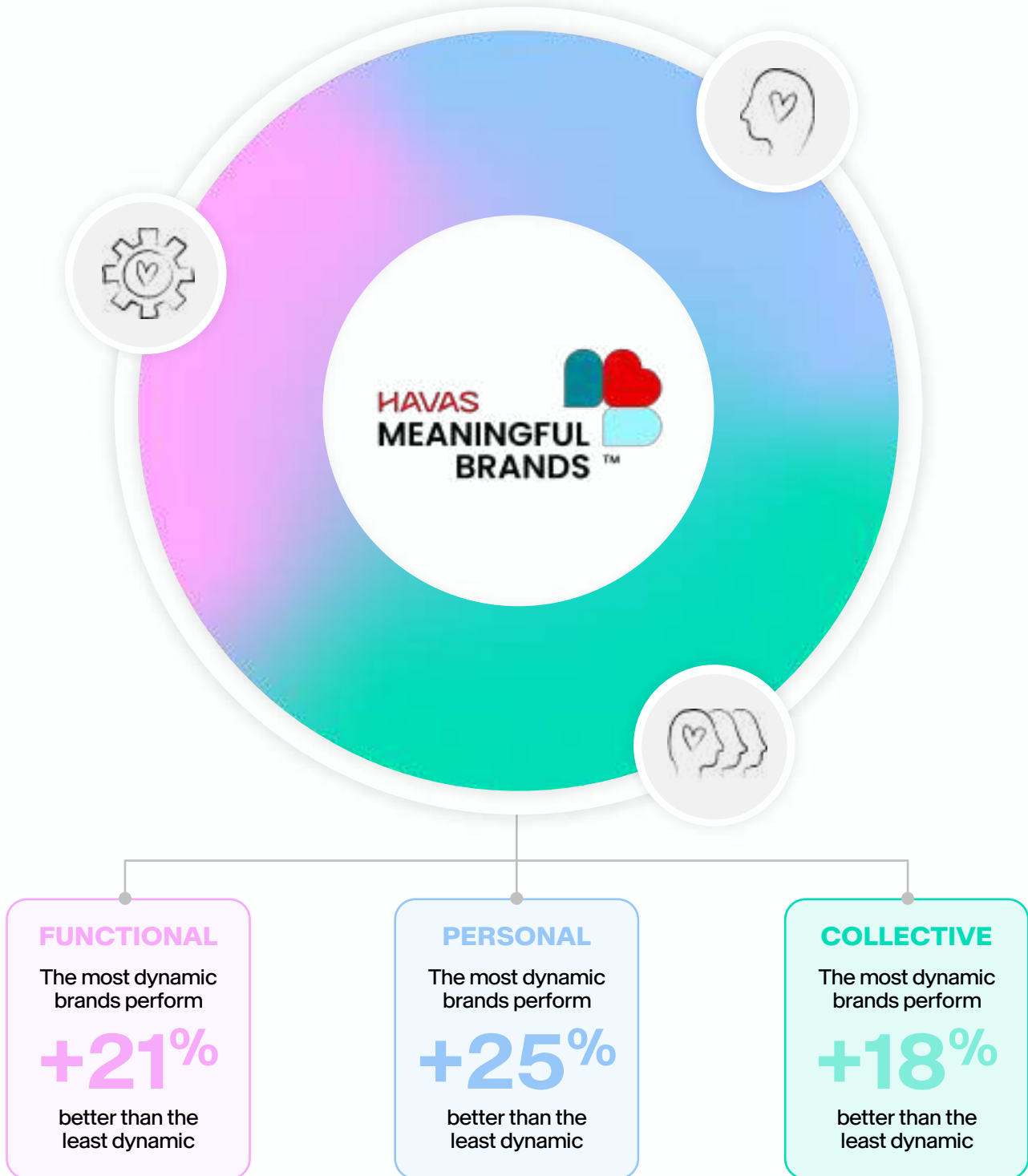
The most dynamic brands actively establish strong foundations as enablers. They succeed because they build on them, not around them. They never forget the fundamentals.

2

BE AN ALL-ROUNDER

Strong foundations enable the most dynamic brands to flourish, and they do this by being brilliant all-rounders. Versatility—their ability to adapt to meet the diversity of people’s needs and expectations—is a critical part of their success.

They build on their foundations to interact with people in many different spheres, establishing new paths to connection with their audiences and placing themselves within the practical and emotional elements of people’s lives.

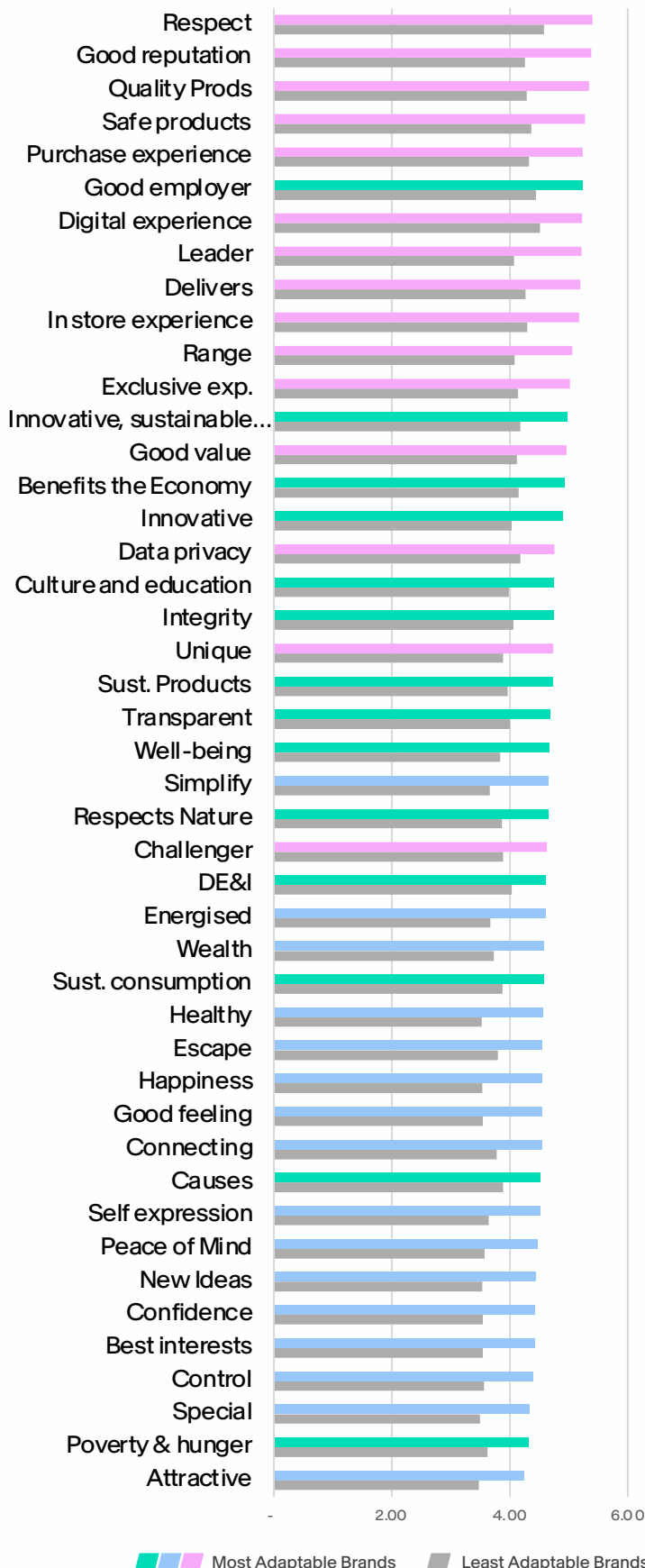


One of the biggest strengths of dynamic brands lies in Personal benefits—showing empathy and humanity. Do this well, and this feature becomes even more pronounced when we take a more granular look at people’s experiences. These most dynamic brands enjoy better scores all-round.

PERFORMANCE ADVANTAGE BY ATTRIBUTE

(RANKED BY ABSOLUTE PERFORMANCE BY ATTRIBUTE FOR THE MOST DYNAMIC)

Performance Scores



BRAND EXAMPLE



BE AN ALL-ROUNDER:
EXPAND YOUR ATTRIBUTES
TO BE A 360-DEGREE BRAND.

- ✓ IKEA ranks 3rd out of 489 brands for Functional performance, highlighting its strength in delivering core value.
- ✓ It ranks 10th in Collective attributes, standing out for its positive impact on society and the environment.
- ✓ It places 7th in Personal attributes, showing strong emotional resonance and individual relevance.
- ✓ IKEA stands as the 4th most meaningful brand in Spain, reflecting broad consumer trust and connection.
- ✓ It outperforms its category by 16%, its industry by 18%, and the national average by 22% on the Meaningful Brands™ Index.

Being an all-rounder is a critical part of the success stories of dynamic brands, with versatility allowing them to move quickly in meeting people's changing needs.

3

EMBRACE THE T-SHAPE EFFECT

The most dynamic brands aren't just strong across the board—they go deep where it matters most. While many brands aim to cover more ground, these brands go a step further: they go deep. "These brands aren't just good all-rounders. They're also serial specialists, with deep strengths in the areas that matter most," says Mark Sinnock.

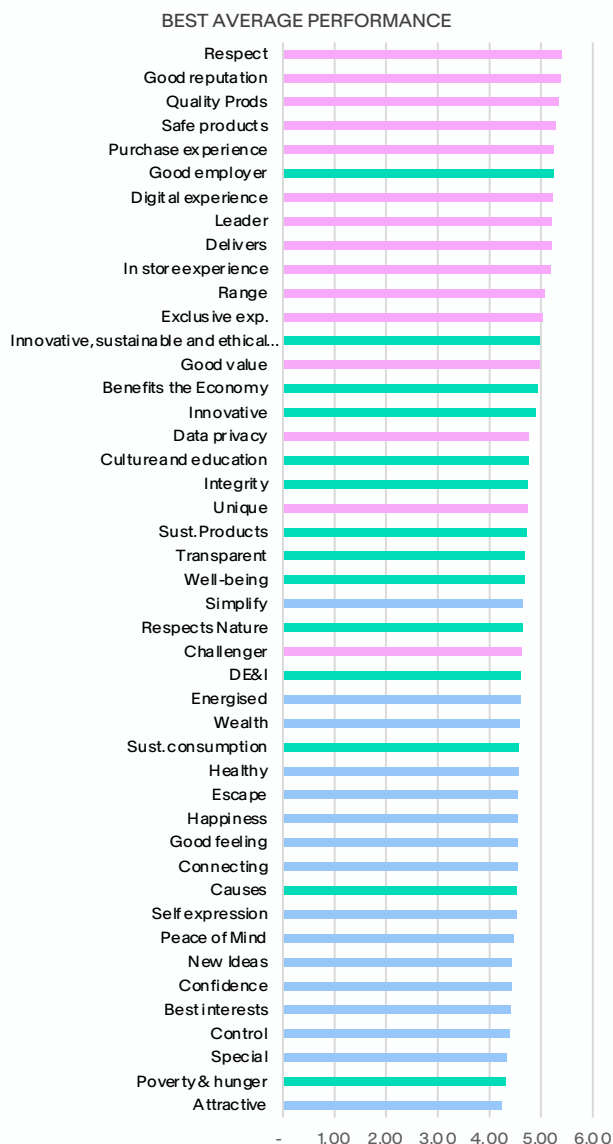
We call this the **T-shape effect**. These brands perform consistently well across a broad set of attributes (the horizontal bar of the "T"), but they also demonstrate **disproportionate strength** (the greatest margin of difference) on the attributes that are most important to core KPIs (the vertical bar). In short, they go both broad and deep.

What is the T-shape?

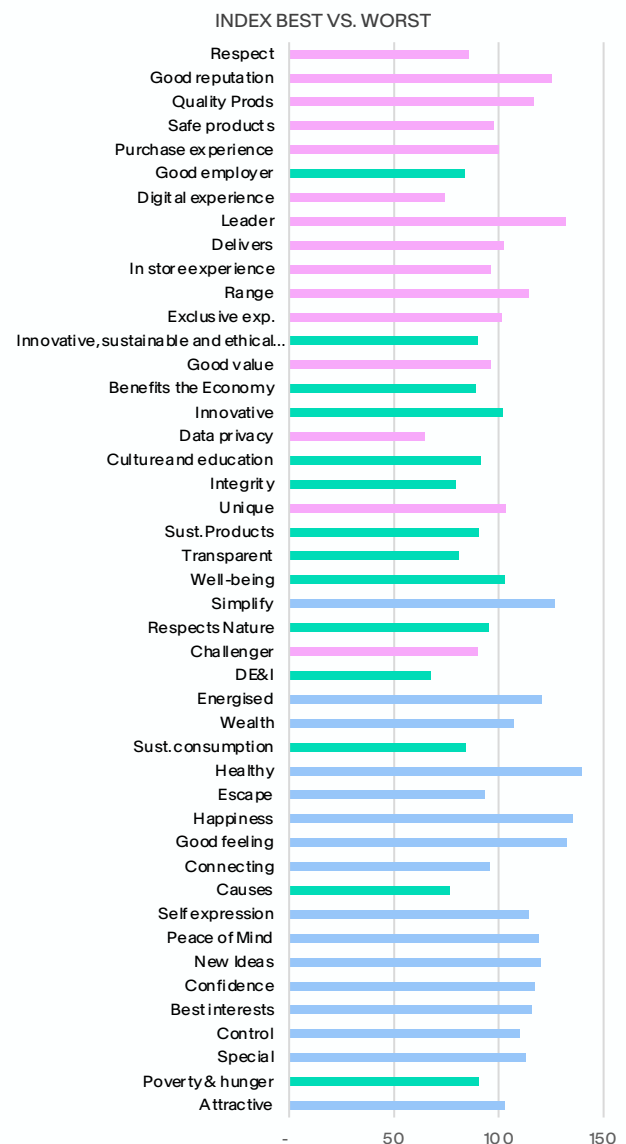
To understand this dynamic, we grouped brands into three tiers—Most Dynamic (top performers), Others (average), and Least Dynamic (bottom). For each attribute, we calculated the difference in performance scores between the Most and Least Dynamic, then indexed these scores by the average of their respective pillar (Functional, Personal, Collective). Attributes with an index over 105 were flagged as areas of standout performance.

What emerged was a set of key brand pillars: Brand Equity, Quality of Life, and Sustainability. Brands that index highly on all these KPIs are the most dynamic and winning as a result.

**Performance Scores: Most Dynamic
(absolute score out of 7)**



**Performance Advantage: Most versus
Least Dynamic (differences out of 7)**



Next, we examined three core KPIs: **Brand Equity**, **Quality of Life**, and **Sustainability**. For each KPI, we ranked attributes by their importance and identified the top 10.

BRAND EQUITY	
Range	123
Quality Prods	121
Good Reputation	119
Purchase Experience	117
Delivers	116
Good Value	115
Leader	113
Respect	112
Happiness	110
Simplify	110

QUALITY OF LIFE	
Energised	115
Simplify	115
Wealth	114
Healthy	114
Good Feeling	113
Control	113
Happiness	112
Self-Expression	112
Peace of Mind	110
Confidence	110

SUSTAINABILITY	
Respects Nature	118
Poverty & Hunger	114
Innovative & Sust. Solutions	113
Culture & Education	113
Healthy	112
Sust. Consumption	110
Well-being	109
Energised	109
Best Interests	108
Self-Expression	107

We then cross-referenced which of these high-importance attributes were also areas where the most dynamic brands significantly outperformed: *difference of most—least dynamic performance—index versus total pillar average*.

BRAND EQUITY		
Dynamic Brands: Outperformance	Attribute	Brand Equity Importance
111	Range	123
119	Quality Prods	121
127	Good Reputation	119
103	Purchase Experience	117
104	Delivers	116
94	Good Value	115
128	Leader	113
93	Respect	112
114	Happiness	110
111	Simplify	110

QUALITY OF LIFE		
Dynamic Brands: Outperformance	Attribute	Quality Of Life Importance
106	Energised	115
111	Simplify	115
95	Wealth	114
117	Healthy	114
112	Good Feeling	113
94	Control	113
114	Happiness	112
99	Self-Expression	112
102	Peace Of Mind	110
99	Confidence	110

SUSTAINABILITY		
Dynamic Brands: Outperformance	Attribute	Sustainability Importance
107	Respects Nature	118
95	Poverty & Hunger	114
109	Innovative & Sustainable Solutions	113
106	Culture & Education	113
117	Healthy	112
95	Sust. Consumption	110
115	Well-being	109
106	Energised	109
98	Best Interests	108
99	Self-Expression	107

BIGGEST DIFFERENCE IN PERFORMANCE RANKED

Leader
Good Reputation
Quality Prods
Healthy
Happiness
Good Feeling
Range
Simplify
Energised
Delivers
Purchase Experience
Safe Products
Peace of Mind
New Ideas
Exclusive Exp.

*Ranked performance gap between Best and Worst Dynamic Brands.

The results are clear:

- **Brand Equity:** Dynamic brands significantly outperform, showing their strongest results in 6 out of 10 top attributes.
- **Quality of Life:** They hold a sharp lead in 4 out of 10.
- And in **Sustainability:** They lead in 6 out of 10.

We call this the T-shape effect: broad strength across many areas, with deliberate depth in the attributes that drive meaningful results. They don't just meet expectations across the board—they exceed them where it really matters. It's about strategic intensity.



ADOPT THE T-SHAPE EFFECT: GO DEEP WHERE IT MATTERS MOST

BRAND EXAMPLE



Huawei is recognised as the 4th most meaningful brand in China, reflecting its strong emotional and practical relevance.



It leads on Sustainability, ranking #1 out of 180 brands—highlighting its commitment to long-term impact.



Its top-performing attributes—Happiness, Quality Products, and Range—are powerful drivers, boosting KPIs across Brand Equity, Quality of Life, and Sustainability by up to 10%.



Huawei also excels in leadership perception, scoring 18% above the category and 16% above the national average on the “Leader” attribute.

As we'll explore next, some of these attributes don't just influence one KPI—they ripple across many. That's where the real multiplier effect begins. The most dynamic brands fully embrace the T-shape.

4

MAXIMISE YOUR SUPERPOWERS

Every brand has the potential to unlock its own superpower—an attribute or experience that delivers disproportionate impact across outcomes. These are not just attributes that rank highly; they are Halo Attributes—benefits that, when prioritised, drive results across multiple KPIs simultaneously.

To uncover these, Havas explored which brand attributes were most consistently powerful—not just for one outcome, but many. First, we mapped each brand pillar to the KPIs it most strongly influenced.

Here's what we found.

ASSOCIATION:

PILLARS	KPIs each Pillar Drives		
Functional	Overall Impression	Advocacy	Trust
Functional + Personal	Familiarity	Brand Equity	Purchase/Repurchase
Personal	Quality of Life	Premium Price	Attachment
Collective	Sustainability		

Fifteen different attributes emerged as the most important in driving each KPI. We then grouped them by the pillar alignments above. If an attribute appeared in three or more of these pillar groupings, it was deemed a Halo Attribute—a high-value attribute that delivers across diverse consumer needs.

These attributes stood out as more than just nice-to-haves. They represent rare territory where consumer expectations align with brand opportunity. The clear message for brands: by identifying their superpowers, they can unlock key strengths and loyalty.

Whether you are aiming to boost trust, justify a premium, deepen emotional connection, or build sustainability credentials—Halo Attributes can help get you there, faster.

THE 8 HALO ATTRIBUTES:

These are the experiences that deliver the greatest ripple effect—consistently emerging as the top drivers across KPIs and pillars. Adaptable brands think of themselves not in silos; they operate as 360 brand experiences.

Happiness

9/10:

Overall Impression, Advocacy, Trust, Familiarity, Brand Equity, Purchase/Repurchase, Quality of Life, Premium Price, Attachment

Good Feeling

8/10:

Trust, Familiarity, Brand Equity, Purchase/Repurchase, Quality of Life, Premium Price, Attachment, Sustainability

Simplify

8/10:

Overall Impression, Advocacy, Trust, Familiarity, Brand Equity, Purchase/Repurchase, Quality of Life, Attachment

Good Value

7/10:

Overall Impression, Advocacy, Trust, Familiarity, Brand Equity, Purchase/Repurchase, Attachment

Purchase Experience

7/10:

Overall Impression, Advocacy, Trust, Familiarity, Brand Equity, Purchase/Repurchase, Attachment

Range

7/10:

Overall Impression, Advocacy, Trust, Familiarity, Brand Equity, Purchase/Repurchase, Attachment

Exclusive Experience

5/10:

Overall Impression, Advocacy, Trust, Brand Equity, Attachment

Self Expression

5/10:

Purchase / Repurchase, Quality of Life, Premium Price, Attachment, Sustainability

The important thing to note is that these qualities are not just brand strengths; they are brand multipliers. They have their own halo and umbrella effects that bring people and brand fans with them.

IMPORTANCE — TOP ATTRIBUTES

BRAND EQUITY	TRUST	ATTACHMENT	QUALITY OF LIFE	ADVOCACY	OVERALL IMPRESSION	PURCHASE/ REPURCHASE	PREMIUM PRICE	FAMILIARITY	SUSTAINABILITY
Range	Quality Prods	Range	Energised	Quality Prods	Quality Prods	Range	Energised	Range	Respects Nature
Quality Prods	Good Reputation	Happiness	Simplify	Good Reputation	Good Reputation	Simplify	Healthy	Leader	Poverty & Hunger
Good Reputation	Delivers	Wealth	Wealth	Range	Range	Good Value	Self-Expression	Good Reputation	Innovative, Sust. & Eth Sol.
Purchase Experience	Respect	Energised	Healthy	Delivers	Delivers	Purchase Experience	Special	Quality Prods	Culture & Education
Delivers	Purchase Experience	Simplify	Good Feeling	Purchase Experience	Respect	Happiness	Poverty & Hunger	Purchase Experience	Healthy
Good Value	Range	Self-Expression	Control	Good Value	Purchase Experience	Quality Prods	Connecting	Customer Experience	Sustainable Consumption
Leader	Good Value	Good Feeling	Happiness	Respect	Good Value	Wealth	Happiness	Delivers	Well-Being
Respect	Safe Products	Purchase Experience	Self-Expression	Leader	Leader	Good Reputation	Respects Nature	Good Value	Energised
Happiness	Leader	Escape	Peace of Mind	Customer Experience	Customer Experience	Delivers	Good Feeling	Digital Experience	Best Interests
Simplify	Customer Experience	Connecting	Confidence	Happiness	Safe Products	Leader	Escape	Simplify	Self-Expression
Customer Experience	Exclusive Experience	Peace of Mind	Best Interests	Simplify	Happiness	Energised	Wealth	Happiness	Sustainable Products
Digital Experience	Happiness	New Ideas	Connecting	Safe Products	Innovative	Good Feeling	Confidence	Innovative	Wealth
Good Feeling	Good Employer	Healthy	New Ideas	Exclusive Experience	Exclusive Experience	Escape	Attractive	Safe Products	Causes
Exclusive Experience	Good Feeling	Good Value	Escape	Digital Experience	Digital Experience	Self-Expression	Best Interests	Good Feeling	Good Feeling
Wealth	Simplify	Exclusive Experience	Special	Innovative, Sust. & Eth Sol.	Simplify	Customer Experience	New Ideas	Exclusive Experience	Integrity

	Meaningful Advantage Scores
Happiness	33.80
Good Feeling	34.29
Simplify	32.26
Good Value	24.35
Purchase Experience	21.80
Range	23.61
Exclusive Experiences	25.08
Self-Expression	35.81



D&G
DOLCE & GABBANA

FIND YOUR SUPERPOWER: MAKE YOUR ATTRIBUTES WORK HARDER

BRAND EXAMPLE

- ✓ Dolce & Gabbana ranks 22nd out of 460 brands in the U.S., earning a strong position as a meaningful brand in a highly competitive market.
- ✓ Its attributes "Good Feeling" and "Simplify" stand out as top drivers across every major KPI, particularly enhancing perceptions of Quality of Life.
- ✓ "Good Feeling" performs 27% better and "Simplify" 15% better than other attributes in the U.S., reinforcing the brand's emotional resonance and relevance in consumers' everyday lives.

Find your superpowers, then maximise them. Whether it is simplifying life, delivering exclusive experiences, or tapping into emotion, leaning into these attributes can transform both growth and performance.

THE CONCLUSION

THE OPPORTUNITY FOR BRANDS





CONCLUSION

Our 2025 Meaningful Brands™ study reveals a fundamental challenge for brands. People wouldn't care if 78% of brands disappeared tomorrow. **Apathy** towards brands is big. And it's growing, with this figure up +5% year-on-year.

This truth is inconvenient at best, but at worst it is an existential threat. Our research shows that apathy can quickly flip to action following a negative experience. The risk of people switching or even cancelling a brand is high.

While apathy towards brands is a growing challenge, we find the opposite of this in people's lives with the rise and rise of agency. Life is difficult for many people, but resilience, optimism, and hope are very much part of the zeitgeist. We saw the emergence of agency in our 2024 report, but in 2025 people's **agency** is amplified. It is no longer restricted to an attitude and now is spilling over into more intentional consumer decisions, more conscious lifestyle choices, and more diverse expectations of brands.

Dealing with these changes may feel threatening for some, but they are in fact opening up rich opportunity spaces for brands to play in.

The problem is that people's needs are not just changing at scale but also at pace, and most brands are failing to keep up. However, our research has identified a group of brands that have

cracked the code and are thriving. Their dominant characteristic is **dynamic adaptability**.

These dynamic brands have a different relationship with people that shifts to meet and get ahead of people's needs. While people are apathetic towards most brands, these dynamic brands matter to people. And they are thriving as a consequence, enjoying significant advantage over other brands across a range of KPIs.

Exploring and understanding these brands highlights a new playbook for growth that other brands can adopt. But in keeping with the idea of dynamic adaptability, the true strength of this playbook lies in its flexibility and dynamic nature.

Zooming into a specific market, category, or even an individual brand will reveal a specific flavour of this approach relevant to that specific context. The result: a fully personalised, focused path toward dynamic adaptability and deeper, more meaningful impact.

As we said at the top of this white paper... If 2024 was about the emergence of personal **agency**, then 2025 is about the **adaptability** that brands must embrace to meet it.

Dynamic adaptability is the new imperative for brand growth.

THE GLOSSARY

KEY TERMS, METRICS
AND DEFINITIONS



GLOSSARY

KPIs	
OVERALL IMPRESSION	% 5-7 on a scale from 1 to 7. Respondents assess their positive (max 7) or negative (min 1) general impression of each brand.
REPURCHASE/PURCHASE	% 5-7 on a scale from 1 to 7. Respondents assess how likely are to purchase / use a product / service of each brand. This % is the sum of the same question for brand clients/users and non-clients/users.
PURCHASE	% 5-7 on a scale from 1 to 7. Respondents assess how likely are to purchase / use a product / service of each brand for a first time (after a period variable per category).
REPURCHASE	% 5-7 on a scale from 1 to 7. Respondents assess how likely are to purchase / use a product / service of each brand for again (in a period variable per category).
ADVOCACY	% 5-7 on a scale from 1 to 7. Respondents assess how much they would recommend each brand to friends / family.
PREMIUM PRICE	% 5-7 on a scale from 1 to 7. Respondents assess how likely they are to pay up to 10% more than the average (use if it's a free brand) for a product / service of each brand.
QUALITY OF LIFE	% 5-7 on a scale from 0 to 7. Respondents assess how much they think each brand contributes to improve their quality of life.
NEGATIVE QUALITY OF LIFE	% 0 on a scale from 0 to 7 %. Respondents who think each brand is making a negative contribution to their quality of life.
ATTACHMENT	% 5-7 on a scale from 1 to 7. Respondents assess how much they who would care if each brand disappeared. <u>Warning</u> : Remember that this attachment DOES NOT represent the number of brands that people would care if disappeared.
TRUST	% 5-7 on a scale from 1 to 7. Respondents assess how much they trust each brand.
LOYAL PURCHASERS	% of brand users/clients who spend/choose more than 50% of their total spending on the category on a brand.
SUSTAINABILITY	% 5-7 on a scale from 0 to 7. Respondents saying that the brand contributes to the long-term wellbeing of both people and planet.
MB™ Metrics	
MB INDEX	Meaningful Brands™ Index (50% Brand Performance on MB dimensions + 50% Brand Equity)
BRAND EQUITY	Scaled avg. of Brand Equity (overall purchase intention + advocacy + overall Impression); 50% of MB Index
PERFORMANCE	Scaled avg. of MB dimensions. 50% of MB Index
MEANINGFULNESS SCORE	Average of Attachment and Quality of life scores.
Key Metrics	
PERFORMANCE SCORES	Average performance of the pillar/dimension/attribute (1-7 scale of question).
IMPORTANCE SCORES	Correlation between the performance of the pillar/dimension/attribute and the KPI evaluations.

GLOSSARY

Benefit Pillar	Dimension	Attribute (short)	Attribute (long)
Functional benefits	Brand/Products Performance	Challenger	Acts like a challenger and disrupts the category.
Functional benefits	Brand/Products Performance	Delivers	Delivers what it promises/says
Functional benefits	Brand/Products Performance	Good reputation	Has products that have earned a good reputation
Functional benefits	Brand/Products Performance	Leader	Acts like a leader in the category.
Functional benefits	Customers Experience	Customer experience	Offers a simple and easy customer experience
Functional benefits	Customers Experience	Data privacy	Respects my personal data
Functional benefits	Customers Experience	Digital experience	Offers a simple and easy digital experience.
Functional benefits	Customers Experience	Exclusive exp.	Offers exclusive experiences
Functional benefits	Customers Experience	Purchase experience	Offers an excellent purchase experience
Functional benefits	Product/Services	Innovative	Is innovative and always coming out with fresh, new products
Functional benefits	Product/Services	Quality Prods	Offers good quality products
Functional benefits	Product/Services	Range	Offers a wide variety of products that are well suited to my needs.
Functional benefits	Product/Services	Unique	Offers products that no other brands can offer
Functional benefits	Value	Good value	Offers good value for money
Functional benefits	Value	Price consistency	Offers consistent prices over time and across countries.

GLOSSARY

Benefit Pillar	Dimension	Attribute (short)	Attribute (long)
Personal benefits	Control	Best interests	Makes me feel like it is looking after my best interests
Personal benefits	Control	Control	Helps me feel more in control of my day-to-day life
Personal benefits	Control	Simplify	Helps me simplify my life
Personal benefits	Control	Wealth	Enables me to be smarter with my money and/or time
Personal benefits	Expression	Confidence	Makes me feel more confident
Personal benefits	Expression	Connecting	Helps me connect with others
Personal benefits	Expression	Good feeling	Helps me feel good about myself
Personal benefits	Expression	Happiness	Gives me a sense of happiness
Personal benefits	Expression	Peace of Mind	Gives me a sense of peace of mind
Personal benefits	Identity	Attractive	Makes me feel more attractive and stylish
Personal benefits	Identity	Self expression	Helps me express myself as an individual
Personal benefits	Identity	Special	Makes me feel special and unique
Personal benefits	Inspiration	Energised	Helps me feel energised and alive
Personal benefits	Inspiration	Escape	Lets me escape from the everyday
Personal benefits	Inspiration	Healthy	Inspires me to take a healthier approach to my life

GLOSSARY

Benefit Pillar	Dimension	Attribute (short)	Attribute (long)
Collective benefits	Ecology	Innovative and sustainable solutions	Invests in innovative and sustainable solutions.
Collective benefits	Ecology	Respects Animals	Respects all living creatures (cruelty-free products, not tested on animals or vegan...)
Collective benefits	Ecology	Respects Nature	Promotes sustainable use of forests & land / seas & oceans
Collective benefits	Ecology	Sust. consumption	Promotes and inspires sustainable, responsible behaviours and consumption
Collective benefits	Ecology	Sust. Products	Offers sustainable brands and products
Collective benefits	Economy	Benefits the Economy	Positively contributes to the national economy and my local community
Collective benefits	Economy	Good employer	Is considered to be a good place to work
Collective benefits	Ethics	Integrity	Behaves ethically and with integrity
Collective benefits	Ethics	Transparent	Is transparent and honest in its activities and communications
Collective benefits	Public Health	Poverty & hunger	Fights against poverty and hunger
Collective benefits	Public Health	Well-being	Supports healthy living and promotes well-being
Collective benefits	Society	Causes	Proactively supports social issues and good causes
Collective benefits	Society	Culture and education	Is a great supporter of culture and education
Collective benefits	Society	DE&I	Actively promotes and supports equality, diversity and inclusion in society
Collective benefits	Society	Gender Equality	Supports gender equality.

ABOUT HAVAS

Founded in 1835 in Paris, Havas is one of the world's largest global communications networks, with more than 23,000 people in more than 100 countries sharing one single mission: to make a meaningful difference to brands, businesses, and people. Havas has developed a fully integrated model through its 70+ Havas Villages around the world, covering all communication activities. The teams of the three business units Creative, Media, and Health & You work together with agility and in perfect synergy to offer tailor-made innovative solutions to clients who support them in their positive transformation. Havas is committed to building a diverse culture where everybody feels they belong and can be themselves and thrive. Further information about Havas is available at www.havas.com.

METHODOLOGY

Havas has measured Meaningful Brands™ annually since 2009, furthering a commitment to bringing data science, insights, and an understanding of people to the core of its strategic methodology across businesses, brands, and markets.

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