

IDEAS

ANALYSIS, INSIGHTS, AND ACTIONS

REPEAT

FOR BRAND GROWTH

FOR

IN A PERIOD OF GLOBAL TURBULENCE



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WPP BAV Playbook examines disruption



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WPP BAV Playbook examines disruption of brand landscape

Identifies
vital steps for
ensuring
brand growth
in tumultuous
times

DISRUPTION!

IT'S WORLDWIDE
AND IMPOSSIBLE
TO AVOID,
WITH POLITICS
TO WEATHER
REPORTS
FRAUGHT WITH
UNCERTAINTY.

That's why we created this WPP BAV thought leadership report as a Disruption Playbook, to make sense of the multiple forces battering the brand landscape and deliver the analysis, insight, and actions that enable brands to navigate intense challenges, thrive, and grow.

The challenges are compounded by the tariff threat and the perilous pace of change.

When I began my agency career, we spent a lot of time—and enormous sums—on research and creative, before launching a campaign that we might change six months later. Among our initiatives for this playbook, we drafted a questionnaire, polled thousands of people, and, with the AI and human brains working in urgent collaboration, had fresh insights into attitudes about disruption, spending, and brand choice—overnight!

This Disruption Playbook will help brands meet the urgency of the moment.

We created the playbook around the unique resources of WPP BAV, the world's largest brand analytics platform, with 32 years of data, 67,000 brands in over 1,000 categories studied across 53 countries—16 billion datapoints!

We leveraged the expertise our own BAV data scientists and brand engineers with the power of the wider WPP BAV community. That includes our WPP company brand experts in WPP agencies across all parts of the world. They have 24-hour access to the best-in-class BAV brand analytics platform that transforms data into razor sharp insights using cutting edge AI analytic tools, all available within WPP Open.

WPP Open is the world's most powerful AI-driven operating system for marketing transformation. It enables the biggest global marketers to transform their processes, enhance efficiency, and accelerate business growth. Using WPP Open, our brand experts supercharge their decades of local market knowledge and branding experience to more rapidly create uniquely rich insights for growing strong, resilient brands.

That's why the Disruption Playbook exemplifies WPP BAV thought leadership at its best.

The playbook begins by examining myriad forces that rapidly and radially reshaped the brand landscape during the disruptive first quarter of the twenty-first century. Then it identifies the factors that continue to accelerate disruption, and the characteristics that make categories and brands most vulnerable. Finally, the playbook recommends Action Points, vital steps for building strong brands that will continue to grow in the marketplace and the stock market.

PART 1:
INTRODUCTION

Drivers of category and brand disruption and their impact.

PART 2:
DISRUPTION ACCELERATING

Factors intensifying disruption, including tariffs and developments in the US, China, India, South Korea, and AI.

PART 3:
**BUILDING STRONG BRANDS
IN AN ERA OF DISRUPTION**

Defining a disruptive brand and examining threats and opportunities.

PART 4:
CONCLUSIONS & ACTION POINTS

Vital steps for building strong, thriving brands.

PART 5:
RESOURCES & CONTACT DETAILS

Accessing the global scale, creative talent, data, technology, and AI capabilities of WPP.

Disruption is unavoidable.
It's part of the natural cycle.

The WPP BAV playbook is one of many ways we're making it easy to benefit from our BAV brand analytics platform and our other WPP global transformational capabilities, like WPP Open, which can help brands thrive in disruptive times.

For our clients, or those who are curious and wish to learn more, contact details appear at the end of this Playbook report. Or feel free to reach out to me directly.

A final thought about navigating disruption. In 1939, on the brink of World War Two, the British government printed a slogan in white lettering against a bright red background. The slogan, now in the culture, is still sound advice:

Keep Calm and Carry On...

...but carry on at lightning speed.

Best regards,



DAVID ROTH
CEO, The Store, WPP
Chairman BAV





INTRODUCTION

Disruption defines the first quarter of the 21st century

Political, personal, consumer pressures challenge brands

WE'RE IN A PERIOD OF INTENSE DISRUPTION.

It spans the first quarter of the twenty-first century, bracketed by the terrorism of 9/11, a historic event that pulled us together, and the Global Covid Pandemic, a social phenomenon that pulled us apart.

Market disruption happens perpetually like a force of nature. The difference today is the duration and intensity. The ground is shaking under categories and brands worldwide, toppling leaders, reordering the ranking of the strongest brands, and revealing fresh challenges for building and sustaining brand equity.

At least three intertwined global trends drive this disruption:

- Political polarization and declining trust in government influence trust levels generally, changing expectations for brand authenticity and opening opportunities for new brands;
- Greater flexibility of personal identity leaves people sometimes confused but also freer to ignore convention, which affects brand choice; and
- The power shift from brands to consumers creates higher expectations for brand connection and responsiveness.

Rather than abating like a spent quake, the seismic energy continues to intensify as other developments accelerate the disruption.

Tariffs, the threat of tariffs, and the US challenge to the established world order are creating economic and geopolitical uncertainty.

China, once the factory of the world known for making cheap goods, is now a brand marketer competing with quality products at competitive prices. India may not be far behind. And South Korea, already a brand competitor, is shaping global popular culture.

ChatGPT, DeepSeek, and other emerging generative AI tools create new marketing challenges for brands, but also opportunities for brave and authentic brands to assert their distinctiveness.

Additional report headlines include:

Shift to local: People increasingly identify with their city or community over their nation, opening opportunities for niche brands and pressuring legacy brands to establish insider connections and communicate empathetically.

Purpose 2.0: People aren't necessarily looking for brands to save the earth or perform a higher purpose, but they do expect a brand to have an animating belief, a reason for being that is in some way useful, honest, and justifies its existence.

Vigilant messaging: Brands need to coordinate their paid and earned messaging and consistently and honestly communicate a brand story that eclipses any random fragments being shaped into a story by AI.

Also triggering, enabling, and accelerating this disruption is the lightspeed development of digitization that created a virtual world to mirror physical reality.

We were still slicing open a lot of envelopes when Blackberry put email on mobile devices in 2002. Google, founded in 1998, was still in its infancy. Amazon was less than a decade old. Apple didn't introduce the iPhone until 2007, fewer than twenty years ago.

This report is designed as a playbook to help brands be resilient and dynamic during this period of rapid, sometimes brutal change. Using WPP BAV data, the report examines the characteristics of disruptive brands, what makes categories and brands vulnerable, and how disruption can open new possibilities.

Insights from WPP brand experts enrich the report, which concludes with Action Points: Four Steps for Thriving During Disruption.

SPOILER ALERT: Successful brands disrupt themselves before being disrupted.

INSIGHT



Marcelo Bicudo
CEO, Brazil,
Design Bridge and Partners

Social fragmenting drives disruption, rise of local brands

We're witnessing a shift from an Era of Gratitude, when citizens felt beholden to a paternalistic government, to an Era of Prosperity. It's happening in Brazil and elsewhere. People who felt disenfranchised and dependent on the government's largesse now try to earn a living driving an Uber, making deliveries, or in other ways dealing with the gig economy. In the end, these people want to be in control.

They have become consumers rather than dependents. They make purchasing decisions. At the same time, in both South and North America, a lot of people feel left behind, both economically and culturally. They want to preserve the past as they don't recognize or feel they belong to what's happening in today's society.

Twenty years ago, globalization fostered a sense of unity. Today, we fragment into social media communities that reinforce our differences. It breaks apart the idea that we are all human. There is no national any more. It's all local or global. We are parts of the same country, but we don't recognize each other. Every fragmentation creates disruption. And disruption is driving the rise of local brands whose impact will be felt across categories.

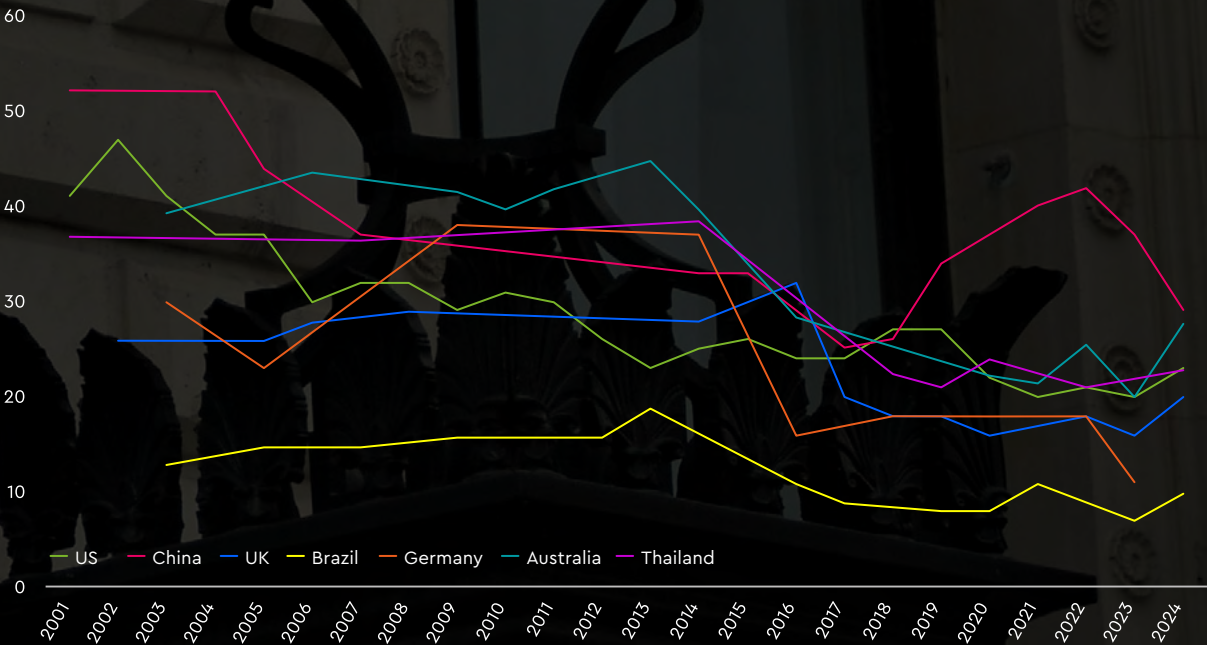
Political, personal, commercial factors disrupt brandscape

Of the many forces disrupting categories and brands during the first quarter of the twenty-first century, three are especially significant because of their magnitude, because they're intertwined, and because their disruptive energy is likely to increase. These factors are political (lack of trust in government); personal (questioning of self and identity); and commercial (the shift in power from brands to consumers).

TRUST IN GOVERNMENT DECLINES...

Between 2001 and 2024, people around the world lost trust in government. Trust declined decisively but unevenly. Implications of this trend include the increased consumer response to hyperlocal brands, brands associated with a city, for example, rather than a nation.

Country Brand Trustworthiness Among its Residents [Percent agree]

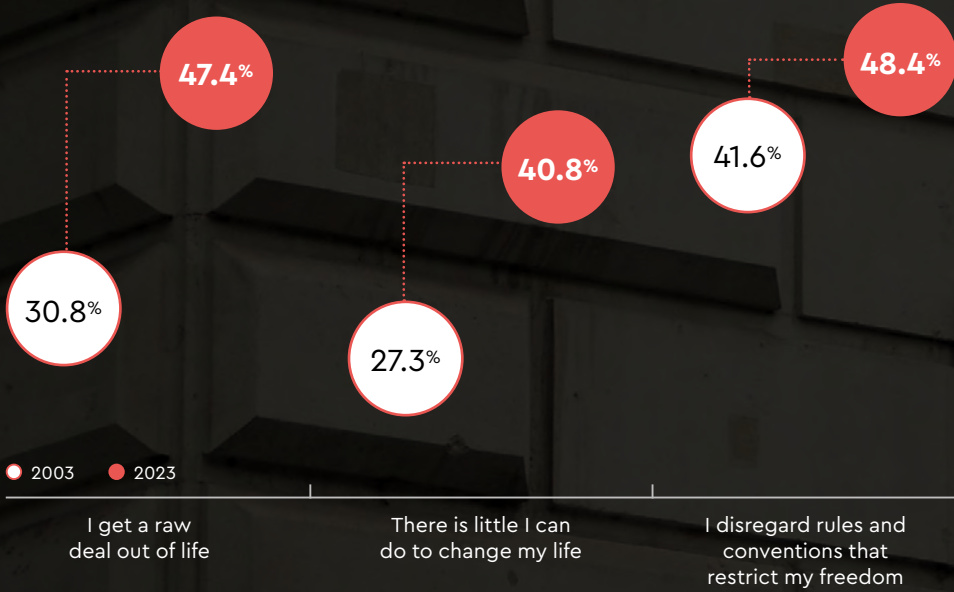


Source: WPP BAV Multiple Markets, Multiple Years, All Adults

... PEOPLE QUESTION THEIR IDENTITY...

Today, people feel free to explore more possibilities for identity and life choices. Dissatisfaction increased between 2003 and 2023, with more people willing to disregard rules and conventions. The findings suggest that disruption may increase, making consumer behavior less predictable.

Change in Personal Opinions [Percent agree]



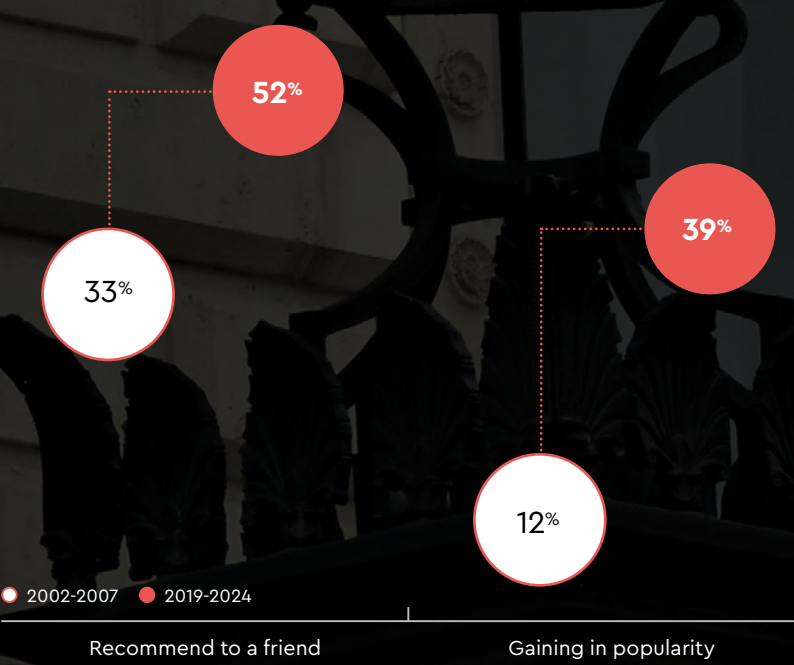
Source: WPP BAV Global, 2003, 2023, All Adults (US, Australia, Chile, Netherlands, Spain)

... AND POWER SHIFTS TO THE CONSUMER

Compared with twenty years ago, brands today are twice as socially responsible, caring toward their customers, and helpful, according to WPP BAV research. That change may be part of a larger shift to greater brand sameness, but it also indicates greater responsiveness to consumers. It reflects one of the key drivers of marketplace disruption—the shift in power from brands to consumers.

Brands that maintained and reinforced their leadership positions between 2002 and 2007 were 33 percent more likely to be recommended and 12 percent more likely to be seen as growing in popularity compared with other brands. Those results increased dramatically in just a few years, reflecting the rising power of consumers. Brands that maintained and reinforced their leadership position between 2019 and 2024 were 52 percent more likely to be recommended and 39 percent more likely to be seen as gaining in popularity compared to other brands.

Rise in Consumer Power [Percent increase]



Source: WPP BAV USA, 2002, 2019, All Adults

Disruption crosses categories, weakens brand leadership

Disruption has impacted all categories, leading to a decline in differentiation that affected some categories more than others. It's difficult to achieve breakout leadership in the best of times. And these were disruptive times. Many fewer brands achieved and sustained leadership in their categories.

The brand landscape has assumed a sameness that almost invites disruption. Compared with twenty years ago, brands today are three times less daring or visionary and two times less trendy.

An unusual indicator of this sameness is the similarity of terms that consumers use to describe brands across disparate categories. The imagery profiles of Google and Campbell's, and of the American Red Cross and IKEA are over 50 percent closer than they were twenty years ago.

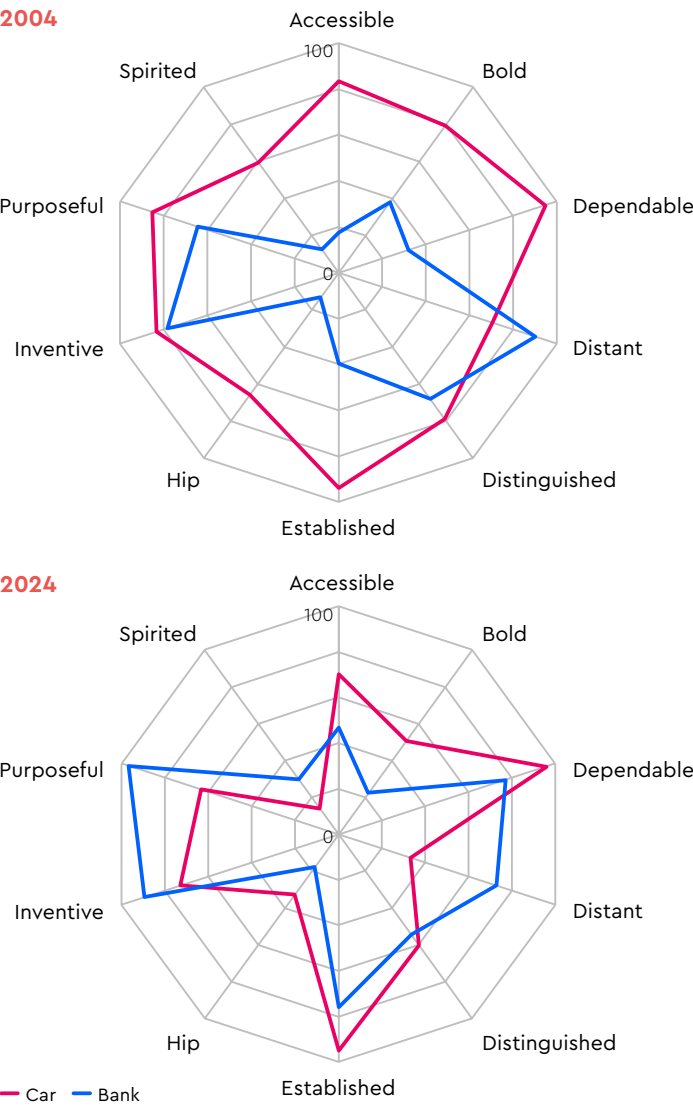
Imagery is important because it fixes the personality of a brand in the mind of the consumer. BAV works with forty-eight imagery attributes, such as daring, unique, and distinctive. Each brand is mapped based on the consumer selection of images.

But with so many brands in the landscape, imagery overlaps across product categories, organizations, countries, celebrities, and other entities. This information overload blurs personality differences.

BRAND PERSONALITY DIFFERENCES FLATTEN...

Consumers describe brands across categories in similar ways, resulting in a sameness that flattens difference, as shown by how the personality of a leading car brand and a leading bank brand converged noticeably over the past twenty years.

BAV Personality Types [Percentile ranks]

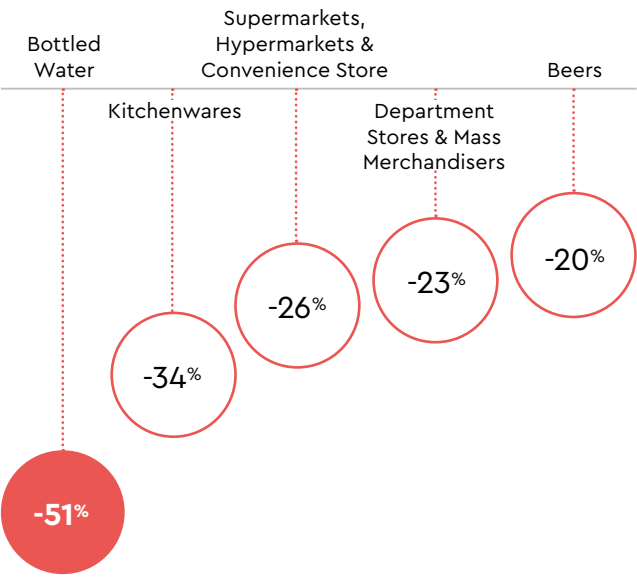


Source: WPP BAV, USA 2004, 2024 (All Adults)

... SAMENESS, LACK OF DIFFERENTIATION MAKES CATEGORIES SUSCEPTIBLE

BAV measures and ranks Differentiation across categories and brands. Between 2012 and 2022, the bottled water category dropped 51 percent in Differentiation rank, for example.

Category Differentiation

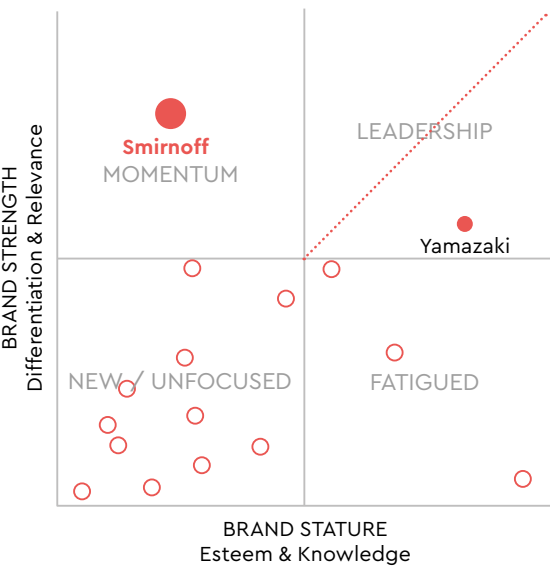


Source: WPP BAV, Global, 2012, 2022, All Adults

... AND MANY CATEGORIES ARE RIPE FOR DISRUPTION

The Spirits and Liquors category in Japan illustrates how a category appears when its vulnerable to disruption. The majority of brands in the category are either established and fatigued or relatively new and not well known or appreciated. Only one brand is in the Momentum category, positioned to disrupt. And consumers see the leading brand as less differentiated than its competitors.

Spirits and Liquors [Japan 2023]



Source: WPP BAV, Japan, 2023, All Adults

FEWER BRANDS SUSTAIN LEADERSHIP

Leading brands perform well on the four BAV pillars of brand equity: Differentiation (capturing attention with a unique reason for being); Relevance (has application in my life); Esteem (respected for leadership, reliability, and quality); and Knowledge (being understood). Leading brands sit in the top right quadrant of the BAV Powergrid, which combines the equity pillars into two axes: Brand Strength (Differentiation and Relevance) and Brand Stature (Esteem and Knowledge).

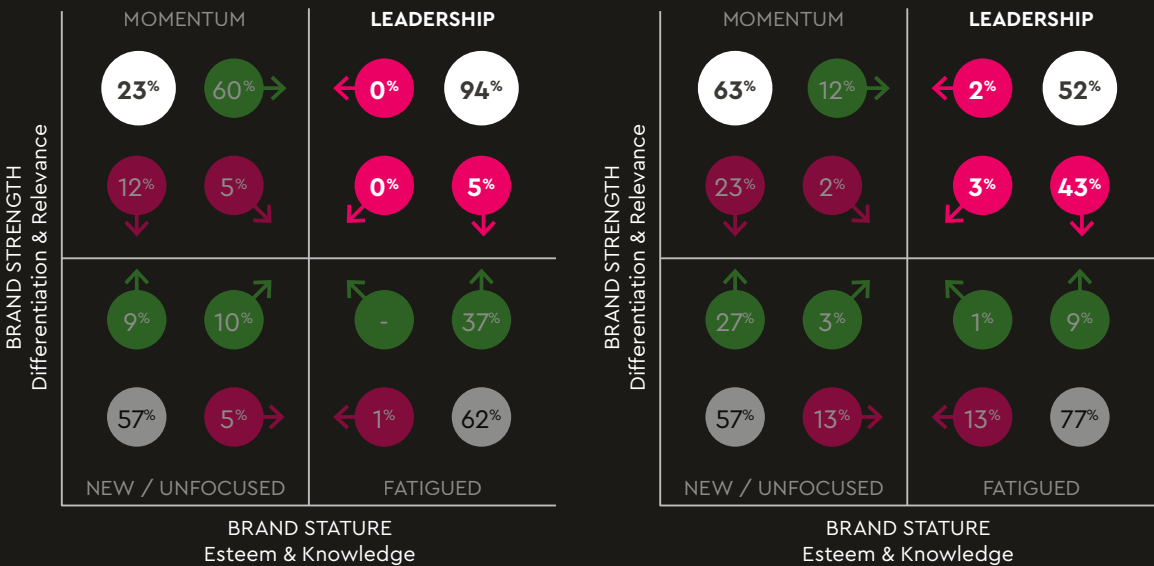
It's becoming more difficult for brands that achieve Leadership to sustain it, based on this analysis of brands available in the US. Of the brands that occupied the Leadership quadrant in 1993, 94 percent still appeared in the Leadership quadrant ten years later. In contrast, only around half of the brands that appeared in the Leadership quadrant in 2014 still appeared in the Leadership quadrant ten years later.

It's also becoming more difficult for potential disruptors to break through and change their category and potentially the world. Of the brands that remained in the Momentum quadrant between 1993 and 2003, 23 percent stayed poised to break into the Leadership quadrant and 60 percent made it. In contrast, of the brands that remained in the Momentum quadrant between 2014 and 2024, 63 percent stayed poised to break into Leadership but only 12 percent made it.

Sustaining Leadership

USA 1993-2003

USA 2014-2024



Source: WPP BAV, USA, Multiple Years, All Adults

INSIGHT



By **Jason Gaikowski**
Chief Transformation Officer,
VML

Disruption always happens,
the pace is now accelerating

It's tempting to say we're in an unprecedented period of disruption. Media brands comprised almost half of the top ten percent of American brands studied by WPP BAV Brand Asset Valuator twenty-five years ago. Media brands have been obliterated, largely replaced by technology brands. Similarly, retail brands have also been profoundly disrupted in the Digital Age.

The related adoption of personal technology devices led to the importance of user experience, which evolved into customer experience, which is obliterating conventions around how brands are built. In 2000, you could build a brand around a product of acceptable quality, introduced with an emotional story and distributed through food, drug, and mass. Today, the best story doesn't win, the best experience wins.

It may be that the pace of disruption is speeding up, but it's important to recognize that there's always some disruption. Consider the potential of AI to transform the impact of creativity on human experience. We should probably think about the upper Paleolithic revolution where there was an explosion of creativity that resulted in cave painting. Think about the Golden Age of Greece, the Renaissance, the Enlightenment, the Industrial Revolution, the Digital Age.

It's more likely that what we're seeing is not new. We seem to be navigating a period of category fragmentation. It's quite plausible that the period of mass brands post-World War Two was the outlier. To paraphrase Amazon founder Jeff Bezos, all brands will go out of business; the job of the manager is to delay that day as long as possible. The possibility of disruption too often drives business to look for efficiencies. Take care not to optimize the business into oblivion. If it's any comfort, consider this quote from *Battle Star Galactica*, "All this has happened before. All this will happen again."

In disruptive times, strong brands produce superior market returns

A portfolio of the WPP BAV Top 50 Most Differentiated Brands increased 1,026 percent between March 2015 and March 2025. In contrast, the NASDAQ increased 301 percent, the S&P 193 percent, and the Dow Jones 150 percent during the same period.

In monetary terms, \$100 dollars invested in the NASDAQ index in 2015 would be worth \$401 today, invested in the S&P it would be worth \$293, and in the Dow Jones, \$250. In contrast, \$100 invested in WPP BAV portfolio of the Top Most Differentiated Brands in 2015 today would be worth \$1,126.


These results show exceptional ROI, especially during disruptive times. Investing in strong, differentiated brands generated more value for shareholders.

DIFFERENTIATION DRIVES GREATER BUSINESS MOMENTUM AND STOCK PERFORMANCE THAN MAJOR MARKET INDICES

BAV Top Differentiated Brands and stock market indices



Source: WPP BAV, USA, All Adults



DISRUPTION ACCELERATING

US Tariffs intensify ongoing disruption, increase uncertainty

BUT BRAND RESILIENCE VARIES BY COUNTRY

The US imported \$4.11 trillion in goods and services in 2024. That spending is likely to decrease with the imposition of tariffs. And no category or brand is immune.

But a brand's country of origin can help absorb the economic shock, according to new WPP BAV analysis.

To assess how a brand's country of origin can influence American consumer purchasing, despite tariff-driven price increases, we created a unique analytic model that combines these three BAV Best Countries metrics:

The Halo Effect: The boost that benefits an individual brand when brands overall in the country of origin enjoy positive brand equity and reputation.

Country Preference: The consumer desire to buy products made in a particular country. This preference indicates brand loyalty and willingness to absorb some price increase rather than switch to products made in a different country.

Purchasing History: The number of consumers who have purchased a country's products in the past, which provides a baseline indicator of how much is at stake with potential price hikes.

The Halo Effect will vary depending on the competitive space a brand occupies. For commodities, the country of origin will be less consequential than for luxury products, where the importance of provenance may, for example, sustain preference for French fragrance, German automobile engineering, or Italian fashion.

The Halo Effect may diminish, however, for luxury brands or other high-end products when their provenance is Vietnam or another cost-effective manufacturing country. Conversely, the association with luxury and other high-end products could burnish the reputation of countries, like Vietnam, better known for sourcing commodities.

The new BAV Best Countries analytic model is based on initial tariff levels, which could change during negotiations. Regardless, there is little doubt that tariffs will impact US consumer spending habits.

Although American attitudes divide on social and political issues, they agree on the high cost of living. And their No. 1 consideration when purchasing a product already is price, according to research that appears later in this report.

Tariffs have increased awareness of where well-known products are made. And 77 percent of global consumers agree: *The country a product is made in impacts my preference to purchase it.*

Our BAV analysis suggests that a brand's country-of-origin can help protect it against customer resistance to tariff-induced price increases. In addition, some countries of origin may benefit as more people associate them with leading brands.

John Keaveney
Global Managing Director, Analytics & Insights, VML
Global Head of Innovation, WPP BAV

COUNTRY OF ORIGIN CAN HELP ABSORB SHOCK

Because of a combination of factors, including a Halo Effect, countries of origin can help their brands effectively compete despite price increases driven by tariffs. This chart ranks countries of origin according to how much their provenance adds resilience.

Country Resilience Top 10



Source: WPP BAV Best Countries 2024/2025

Disruption, financial strain impact US optimism, brand choice

AMERICANS BELIEVE THE WORLD AND THE COUNTRY ARE IN A PERIOD OF DISRUPTION.

They feel financially challenged, with 58 percent of Americans, across all age groups, reporting that their cost-of-living rose somewhat or significantly. Half of Americans say they are questioning their sense of self somewhat or much more. Not surprisingly, young people, ages 18 to 24, are more likely to question their identity, but even older people, ages 55-plus, say they're more likely to question personal identity.

These findings emerged in a WPP BAV study conducted late in February 2025, using the Bounce Insights platform, to gauge American attitudes over the prior three months, and to examine any related changes in consumer spending and predisposition toward product categories and brands. Among the key findings:

68%

of Americans believe that the **WORLD** is in a period of disruption and only 17 percent disagree, with 15 percent undecided

Democrats are more likely than Republicans to view the world in a period of **DISRUPTION**, 78 percent compared with 62 percent.

71%

of Americans believe that the **US** is in a period of disruption and only 17 percent disagree with 12 percent undecided

Democrats are more likely than Republicans to view the US in a period of **DISRUPTION**, 82 percent compared with 64 percent.

How Americans feel about the country during this disruptive period varies dramatically by political party, with around two-thirds of Democrats feeling more negative about the US, compared with only one-fifth of Republicans. And critically, around half of young people, ages 18 to 24, feel negative about the country, a much higher proportion than any other age group, suggesting a generational shift in attitude.



OPTIMISM VARIES

Despite their perception that the world and the country are going through a period of disruption, almost two thirds of Americans feel somewhat or very positive about the future and almost three quarters of young people ages 18 to 24 feel that way.

But not everyone feels equally optimistic. Just over three quarters of Republicans feel positive about the future compared with 60 percent of Democrats. Republicans also feel significantly more confident in their personal financial situation compared with Democrats.

And when asked to consider potentially disruptive developments as threats or opportunities, Americans, with some variation based on politics, tend to view the factors as opportunities rather than threats, although older people, ages 55-plus, are more likely to view the factors as threats.

At least half of Americans view these disruptive factors as opportunities: Remote and Hybrid Working and Healthcare and Biotech Advances. People of all ages are more ambivalent about AI and Automation, which they view roughly equally as both a threat and an opportunity.

Significantly for brands, 55 percent of Americans see Consumer Power and Brand Accountability as an opportunity.

IMPACT ON BRANDS

US brands remain popular among Americans. Around a third of Americans overall, and almost half of Republicans, report feeling more positive about US brands in the first three months after the presidential election. Men are significantly more likely to feel positive about US brands.

Trust in brands remains steady, with older people reporting the highest levels of trust and young people reporting the sharpest increase in trust. Greater trust among young people may reflect their growing experience with brands.

Overall, sustained trust in brands among Americans, despite the polarity in their positive or negative feelings about the country, may signal an opportunity for trusted brands to provide consumers with welcomed consistency during a period of disruption. Caveat: Trust levels may fluctuate, as futures studies could reveal.

Cost-of-living stress challenges brands, however. For example, 39 percent say they're less likely to buy name brand products because of financial reasons. Conversely, 18 percent of people say they're more likely to purchase store and generic brands.

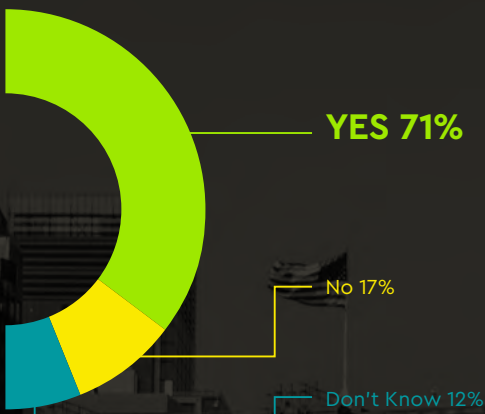
Similarly, people are likely to purchase food and beverages and other essential products, while reducing discretionary spending on dining out and entertainment or household items and furniture. Young people in household formation years may increase spending on household items.

The top three reasons that people choose brands—price, product quality, and trust—are consistent among demographic groups and despite political differences. The high cost of living, rather than other disruptive factors, seems to drive category and brand changes in spending priorities.

AMERICANS BELIEVE THE US IS EXPERIENCING DISRUPTION....

Almost three-quarters of Americans, 71 percent, believe the country is in a period of disruption. Another 12 percent don't know, and only 17 percent do not believe the country is in a period of disruption. Members of both US political parties, although more Democrats than Republicans, believe the country is in a period of disruption.

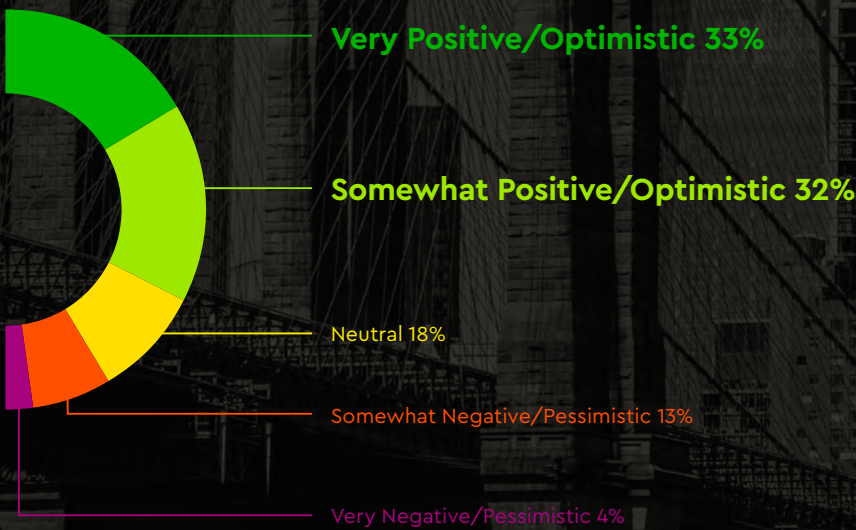
Americans Feel Disruption



... BUT AMERICANS REMAIN POSITIVE ABOUT THE FUTURE

Almost two thirds of Americans feel positive about the future and almost three quarters of young people ages 18 to 24 feel that way. Republicans are more optimistic than Democrats.

Feelings about the Future

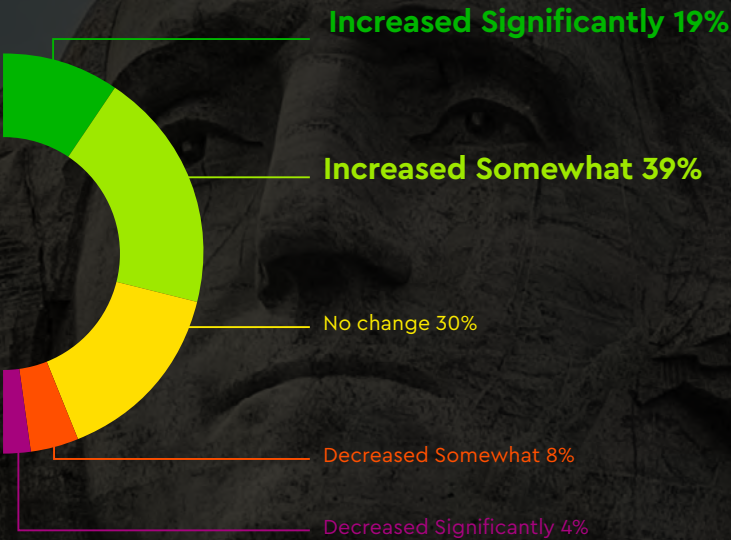


Source: WPP BAV Using Bounce Insights Platform

AMERICANS FEEL A COST-OF-LIVING INCREASE...

A majority of Americans, 58 percent, say that their cost-of-living rose somewhat or significantly. Just under one-third say the cost-of-living hasn't changed.

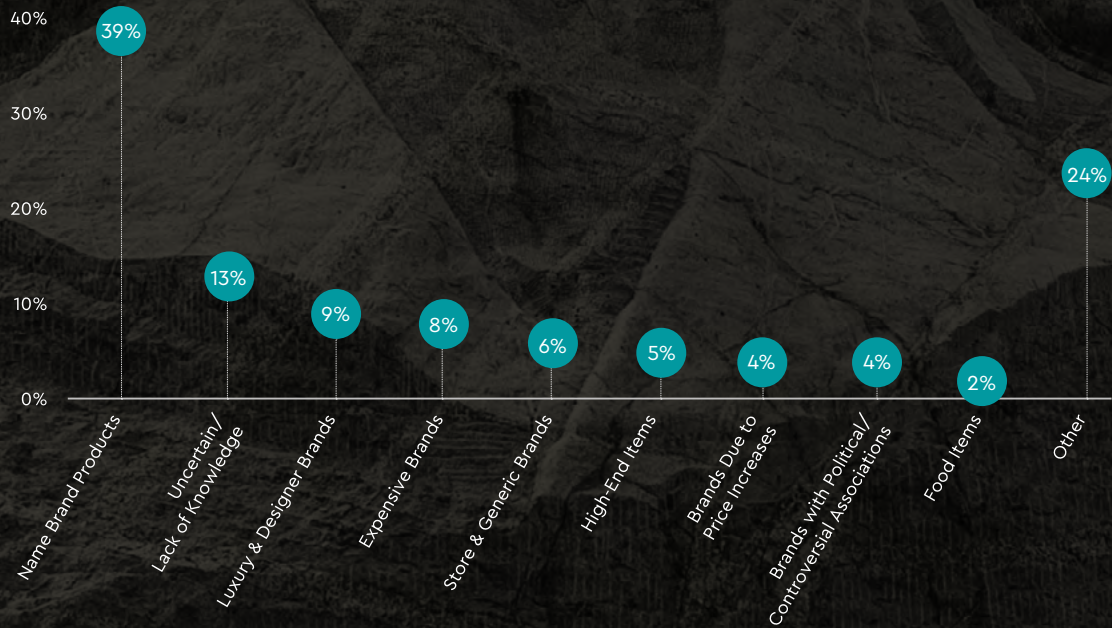
Financial Stress



... AND AMERICANS ARE LESS LIKELY TO PURCHASE NAME BRAND PRODUCTS...

Financial stress seems to impact buying decisions; 39 percent of Americans say they're less likely to buy name brand products, and 18 percent say they're more likely to purchase store and generic brands.

Impact on Brands [Percent selecting as less likely to purchase]

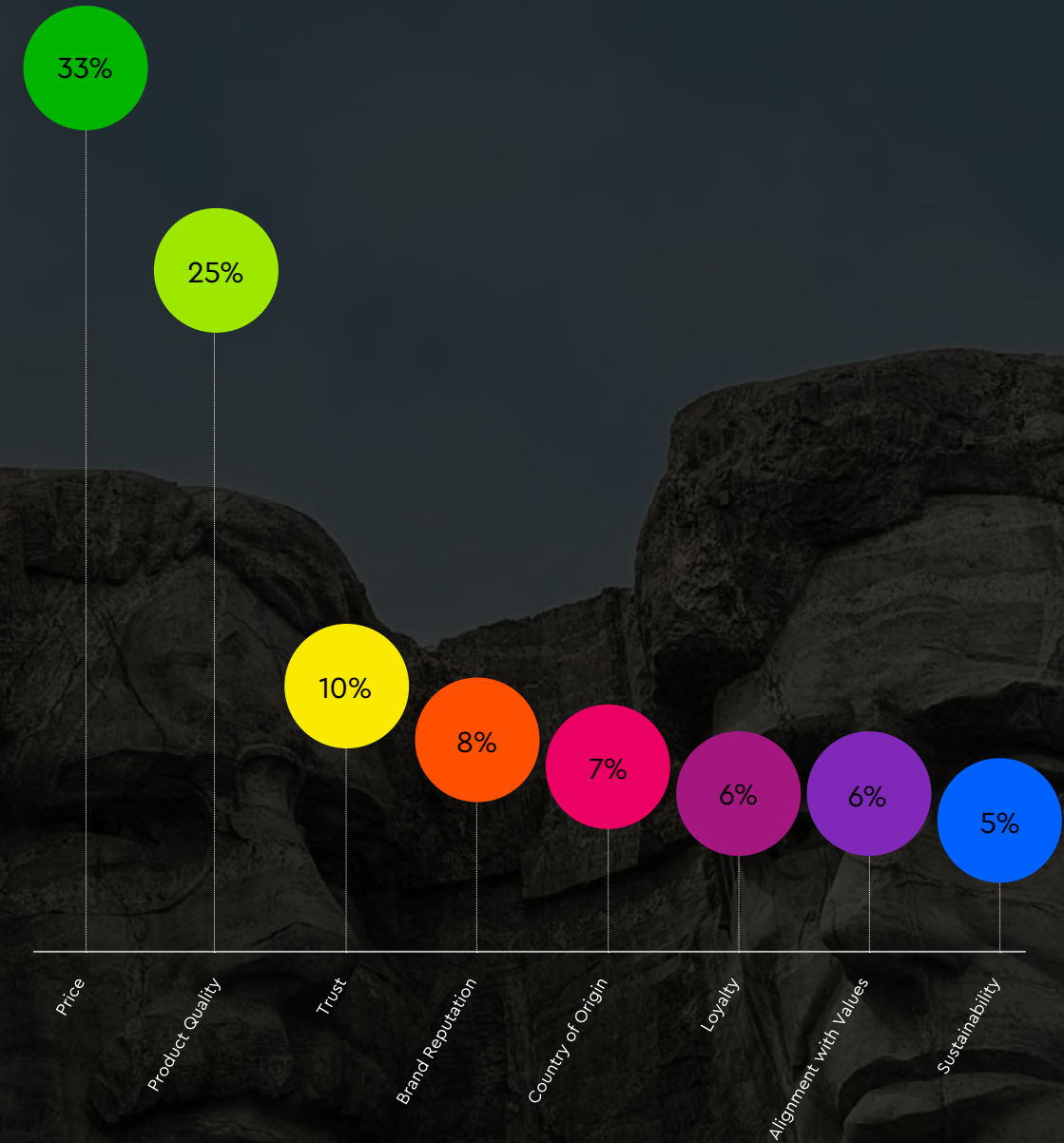


Source: WPP BAV Using Bounce Insights Platform

... BUT AMERICANS BROADLY AGREE ON THE REASONS FOR CHOOSING A BRAND

The top three reasons that people choose brands—price, product quality, and trust—is consistent among demographic groups and despite political differences.

Reasons for Brand Choice [Percent selecting as No. 1 reason to choose a brand]



Source: WPP BAV Using Bounce Insights Platform

EVs and technology lead list of branded Chinese products

THE WORLD'S CONSUMERS HAVE LONG
DEPENDED ON CHINESE PRODUCTS,
SOMETIMES NOT KNOWING THE ORIGIN
OF THE PRODUCTS OR CONSIDERING
THEM OF INFERIOR QUALITY.

NOW THEY'RE BECOMING
ACQUAINTED WITH CHINESE BRANDS.



Chinese brands benefitted from the technological spectacle around the 2008 Beijing Summer Olympics. Today, China is No. 2 after the US as the country with the most desired products, according to WPP BAV Best Countries data.

China initially found receptive consumers in developing countries. Today, the combination of quality at a good price may be irresistible to financially stressed consumers in developed countries. Some Chinese brands benefit from the minimal cost of entry on the internet, where customer experience is at least as important as brand story.

China rapidly advanced from the world's factory for cheap goods to a maker of quality branded products for several reasons. Western companies traded their expertise for access to a market of over a billion people. And consumer insights grew exponentially with vast amounts of data gathered without strict privacy protections. Quality improved with decades of practice, manufacturing for export markets.

Cars is an illustrative category. China initially exported vehicles to developing markets in Southeast Asia and Africa, but not to Europe and other countries with substantial competition. However, Chinese automakers are now actively expanding to developed countries in Europe and to Australia.

Chinese cars are well-received in Australia. BYD marketed the quality and benefits of its electric vehicles to Australians. It launched as an aspirational product with an event at an upscale gallery, where BYD showcased its technology. Affordability attracted Australians to China's Chery car brand. BYD and Chery don't emphasize Chinese provenance, but neither do they face resistance.

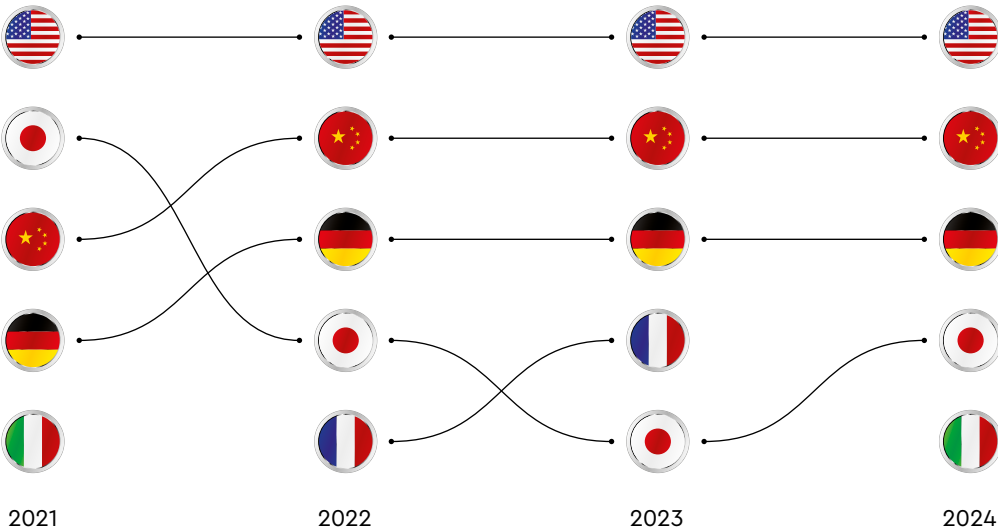
China needs to find receptive export markets as domestic consumer spending slows and the aging population requires fewer consumer goods. As evidenced by the presence of Chinese infrastructure in Africa and other parts of the developing world, China can effectively export its strategic businesses, including technology, the new belt and road that links the virtual world.

Huawei is one of the world's largest producers of fiber optic cable. The ability of DeepSeek to potentially produce artificial intelligence more economically than its Western competitors is another example of how Chinese brands can produce high quality products, relatively quickly, especially in industries that manifest Chinese economic strength and soft power.

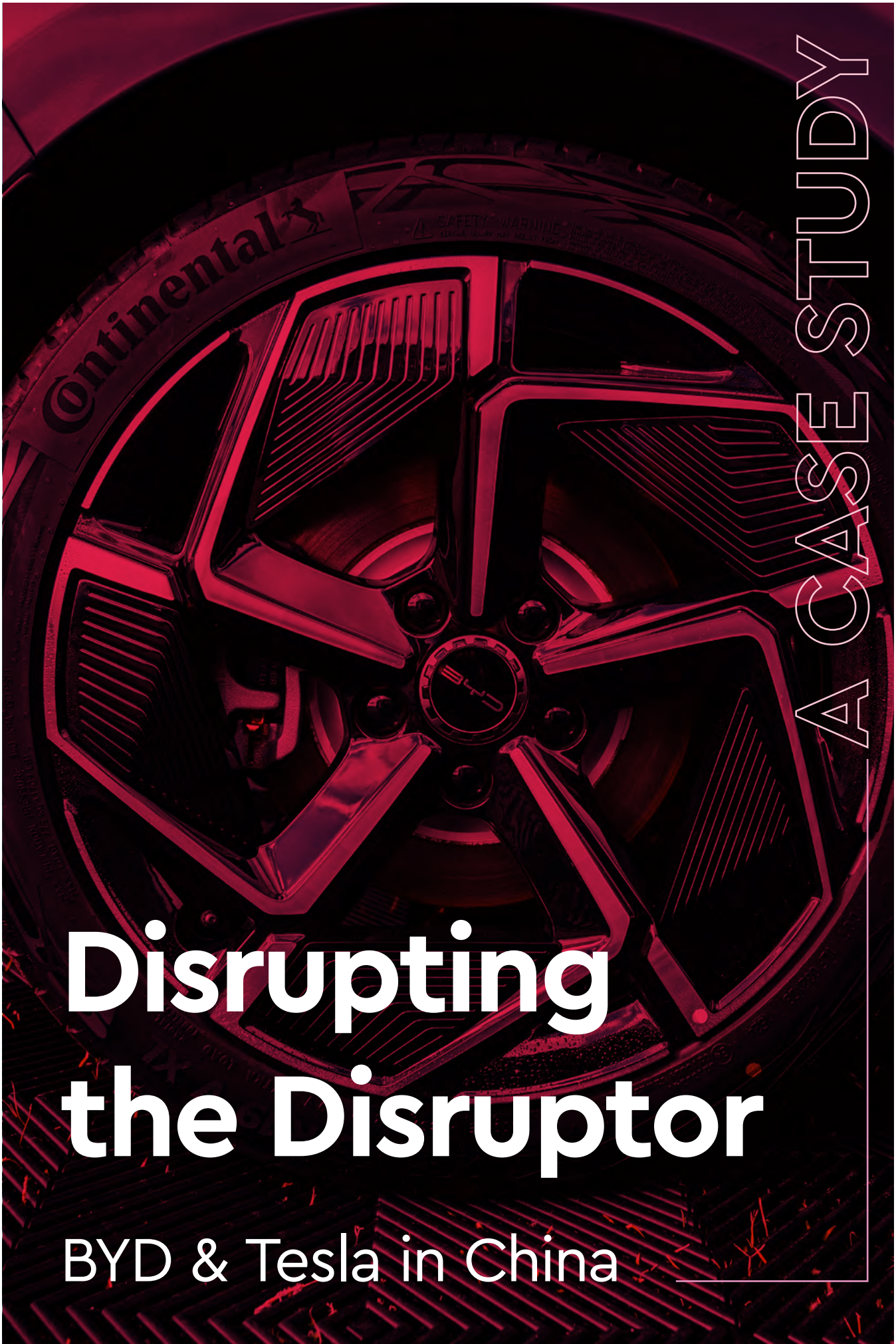
Hundreds of Chinese brands, most notably BYD, make over sixty percent of the world's EVs. The technology relies on batteries, and before BYD made cars, it made batteries. China could be poised to follow the same arc as its neighbors, Japan and South Korea, which began offering cheaper products and now deliver world leading brands such as Toyota and Honda, Hyundai and Kia. The impact of tariffs is not yet clear.

CHINA SUPPLIES STRONG CONSUMER BRANDS

Consumers for decades thought of China as one of the world's leading exporters, often of cheap products. That perception has changed over the past few years. Consumers worldwide now rate China as the No. 2 as a global brand builder just under the US and above other contenders, including Germany, Japan, and Italy.



Source: WPP BAV Best Countries



Warning:

DISRUPTION CAN OCCUR UNEXPECTEDLY AND AT WARP SPEED

For early warning, it's advisable to watch developments in China, where warp speed is the normal pace of change.

Chinese brands often disrupt markets with competitive technology, design, pricing—and speed. But disruption in China has shifted into overdrive as disruptor challenges disruptor in the clash between two pioneer EV brands, US-based Tesla and China's BYD.

Tesla sold 1.79 million electric vehicles worldwide in 2024, an extraordinary accomplishment, but also the company's first year-on-year sales decline, and just shy of the worldwide EV unit sales of BYD, which surpassed Tesla for the first time.

What happened?

Elon Musk became Tesla's CEO in 2008, at a time when major automakers focused almost exclusively on combustion engines. Within a decade, Tesla became more valuable than the legacy US car makers. Wang Chuanfu started BYD Auto in 2003, as a subsidiary of the BYD battery manufacturing company he established in 1995. Soon, sales of BYD's car business surpassed its battery business.

Both Tesla and BYD benefited from the Chinese government's commitment to electric vehicles as a way to reduce its dependence on imported oil, boost its exports, and expand its soft power. The Chinese government permitted Tesla to build and own its own manufacturing plant in China in 2018, waiving the requirement for a Chinese joint-venture partner.

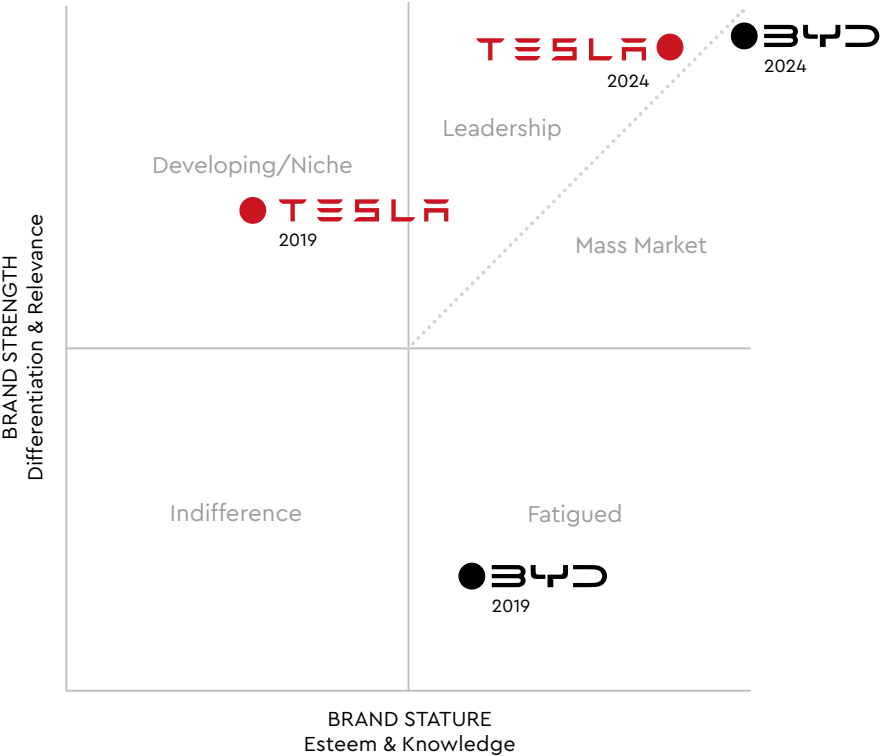
Chinese brands from outside the automotive industry intensify the disruption. Phone makers Huawei and Xiaomi introduced attractively priced EVs, viewing them as another mobile device. The arrival of these new Chinese competitors triggered price discounting and coincided with a growing Chinese preference for local brands over imports.

BYD rapidly responded to the changing market dynamics, expanding its product line at all levels, from a \$5,000 entry price point to luxury. It differentiated with enhanced design, sports cars with a reputation for performance, and luxury cars with massage seats for weary drivers.

Tesla also excelled in the changing Chinese market, selling 657,000 EVs in China in 2024, a record for the company. However, as EV sales weaken in the US and Europe, China, Tesla's second largest market after the US, has become more important. And Chinese consumer perception of the Tesla and BYD brands is rapidly shifting to favor BYD.

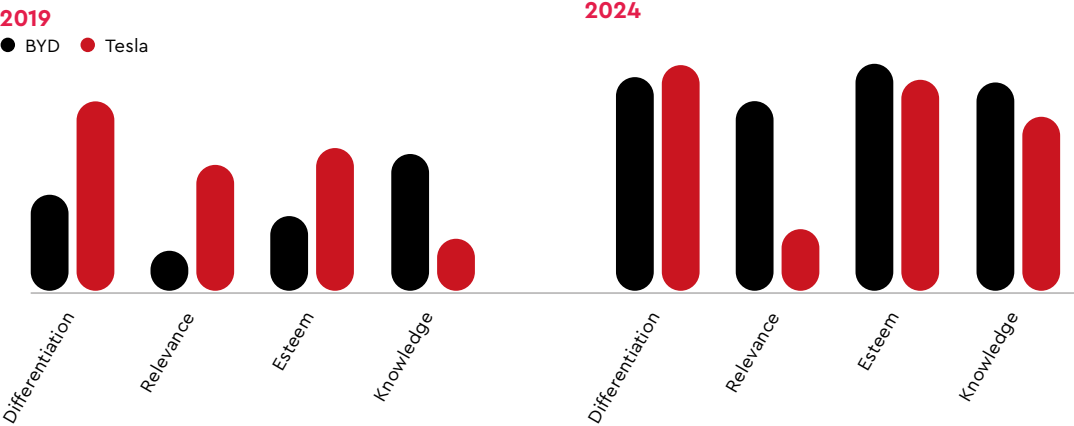
BYD OUTPACES TESLA IN CHINESE CONSUMER PERCEPTION...

The Tesla brand continued to grow in important brand metrics in China, but not as fast as its key EV rival, BYD. In just five years, from 2019, prior to the pandemic, until 2024, Tesla moved from being seen as a developing niche brand to being seen as a category leader. However, over the same period, BYD exploded from being seen as a fatigued brand to being viewed as a category leader. Among people 35 and older BYD experienced a meteoric rise, with leadership scores rivaling Alibaba, Huawei, and Amazon.



... AND IN STRENGTHENING BRAND EQUITY

In 2019, Tesla outperformed BYD in Differentiation, Relevance and Esteem, three of the four BAV pillars of brand equity. That means consumers viewed Tesla as different in a way that served their needs, and they held the brand in high regard. BYD, meanwhile, led Tesla only in Knowledge, meaning Chinese consumers were familiar with the brand, probably because of BYD's battery business. In 2024, BYD exceeded Tesla in Relevance, Esteem, and Knowledge and almost matched it in Differentiation. Chinese consumers across many income and age groups see both Tesla and BYD as leadership brands. These metrics are important commercially because they correlate with margins and market penetration.

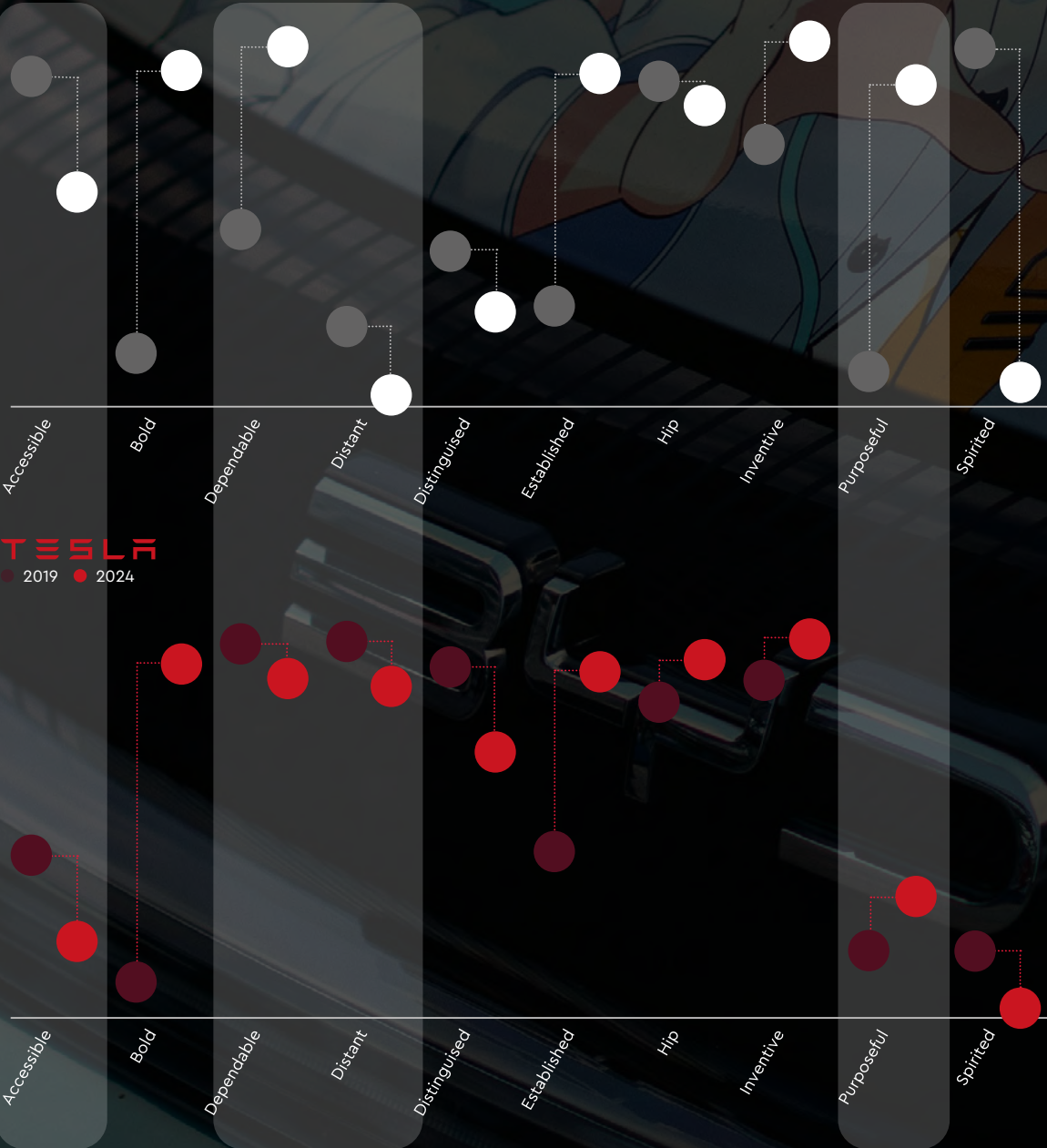


Source: WPP BAV China, 2019, 2024, All Adults

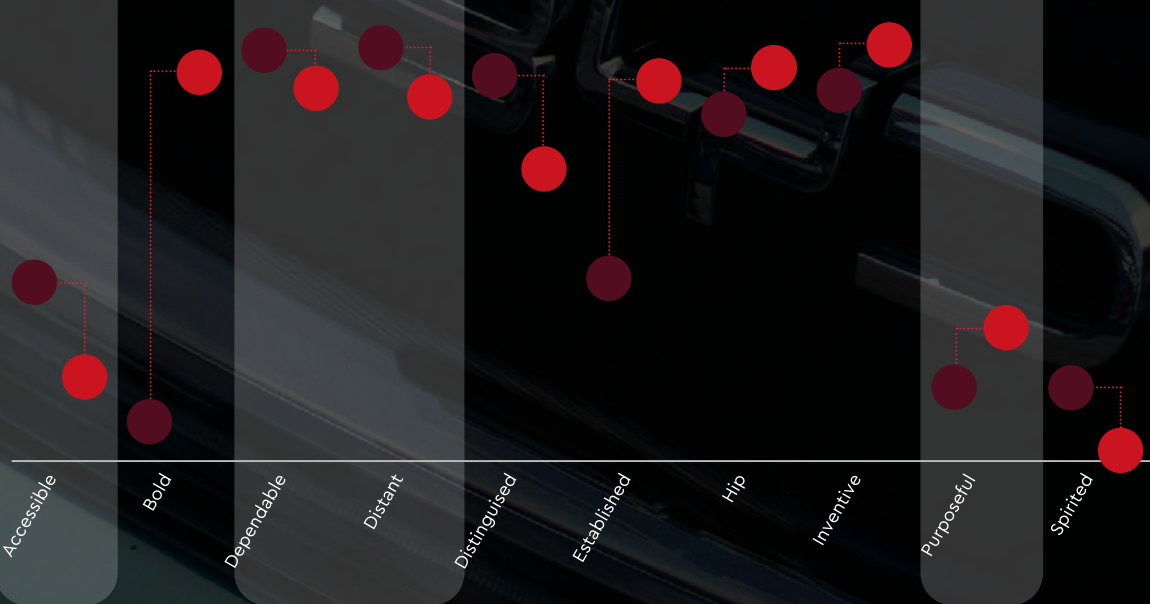
BYD ALTERED ITS BRAND PERSONALITY...

Chinese consumers view BYD as more Dependable and Purposeful than it was five years ago. They see Tesla as weaker than BYD in those attributes but still strong in other attributes, including Bold, Hip, and Inventive. Consumers see both brands as less Accessible, suggesting price sensitivity.

BYD
● 2019 ● 2024



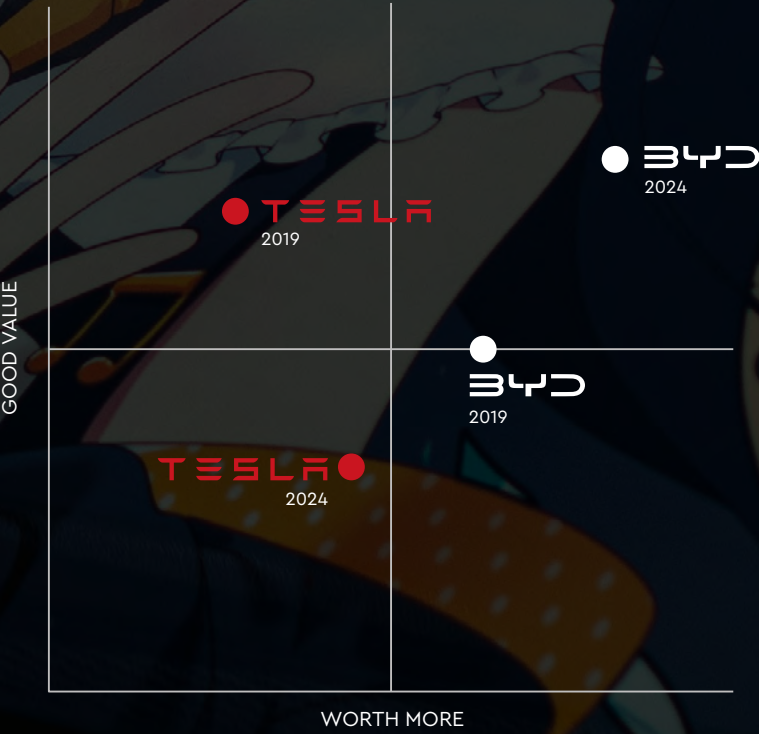
TESLA
● 2019 ● 2024



Source: WPP BAV China, 2019, 2024, All Adults

... AND BYD CONVINCED CONSUMERS IT'S A BETTER VALUE THAN TESLA

All of these rapid improvements in consumer perception led to an overall consumer conclusion about BYD that's especially critical for driving sales: Chinese consumers consider BYD a good value; they also believe that, compared with Tesla, BYD is worth a premium price.



Source: WPP BAV China, 2019, 2024, All Adults



Charlie Lowe
Chief Strategy Officer, APAC
Design Bridge and Partners

INSIGHT

Indian brands balance
relevance at home
with global growth

Traditional Indian brands are at a very interesting inflection point, which could be seen as a threat or an opportunity both locally and abroad. India is rapidly arriving at the point where China has already arrived. As the world's most populous country, with over 1.4 billion people, India has long been in the plans of the largest global marketers. They seek India because it's such a large market, or they source from India because of its educated, relatively lower-cost, English-speaking, and effective workforce. And that attention won't change.

In certain categories, like insurance, where brands until now have primarily served urban more upper-class consumers, we're seeing new digital-first brands enter the market, developing customer-first positionings to reach the more middle and aspiring classes. These more affordable and differentiated products, designed to capture the belly of India, are becoming attractive even to traditional affluent customers used to paying a higher price. The success of a niche opportunity now has the potential to disrupt an entire category.









Key questions facing Indian brands are: how do we adapt to stay relevant locally? Or how can we scale from a national to an international brand in the way Chinese brands, such as Huawei, grew to be leaders in the domestic market before going abroad? It's tempting for a brand to stick with an identity and narrative that achieved success for so many years. However, with increasing competition, brands now more than ever need to take a step back and assess whether they should evolve to be more relevant to the modern Indian consumer or those outside of India. Indian brands have the potential to disrupt markets around the world, but first they must decide to what extent are they bound by their roots?



INDIAN BRANDS GAINING TRACTION ABROAD

Indian brands remain remarkably popular in India and are gaining traction in certain African and Asian markets, if not yet globally.

Preference for Indian Brands [India's rank among other countries]

	 Automobiles	 Beer	 Clothing	 Cosmetics	 Financial Services	 Healthcare	 Pharmaceuticals	 Technology Electronics
Indians	1	1	1	1	1	1	1	2
Nigerians	34	33	41	28	34	16	19	21
Kenyans	37	48	46	15	32	9	5	32
Vietnamese	42	59	20	61	43	64	43	37
Global	47	67	47	57	62	58	49	41

Source: WPP BAV Best Countries 2024/2025

South Korean influence rises from product to culture

AS IF PRODUCT DISRUPTION ISN'T
ENOUGH FOR BRANDS TO CONTEND
WITH, THE INFLUENCE OF CULTURE
CAN DISRUPT A BRAND OR CATEGORY.

The prime example is South Korea. The country successfully climbed the traditional arc of industrial development, first producing inexpensive goods for local consumption, then exporting them, and finally producing and exporting branded quality products that impressed consumers worldwide.

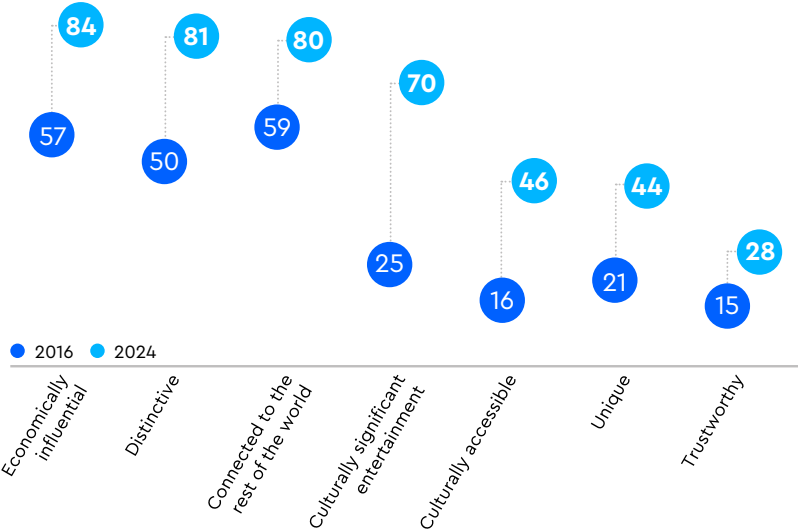
Seemingly at the pinnacle of the development arc, South Korea extended it from products to culture. In less than a decade, South Korea jumped twenty places as a global cultural influencer. In 2016, consumers worldwide ranked South Korea No. 27 in cultural influence in entertainment, according to WPP BAV Best Countries research. They ranked South Korea No. 7 in 2024.

The country's ascent succeeded despite the prevailing attitude, in the East and West, that finds Asian culture less acceptable and less friendly, according to WPP BAV Best Countries research. But consumers enjoy K-pop bands like BTS, winner of multiple Billboard and other awards, and the movie *Parasite*, which won Best Picture and three other Oscars during the Academy Award ceremony in 2020. In Asia and worldwide, men and women look to South Korea for beauty and personal care standards.

SOUTH KOREA'S GLOBAL INFLUENCE INCREASES DRAMATICALLY

When measuring a country's cultural influence in entertainment on a scale of 0 to 100, the world's consumers rated South Korea 70 in 2024, up from a rating of only 25 in 2016.

Global Influence [Rating on a scale of 0 to 100]



Source: WPP BAV Best Countries 2024/2025

INSIGHT



Heather Physioc
Chief Discoverability Officer,
VML

Search engine diversity
challenges brands
to be hyper-vigilant

AI is disrupting search. It has enabled competition from platforms other than Google, which has 91 percent global market share. Reddit is building a search feature. Social platforms like Tik Tok, Instagram and Pinterest are experiencing high volumes of search by young people.

Brands need to be aware of this expanding search engine diversity in order to maximize discoverability, and they need to be hypervigilant, constantly aware of the information available about them. AI is scraping information from all over the web—and drawing conclusions. AI can hallucinate and misinterpret information.

Compounding this issue is a generational difference. Among young people, the authenticity of the influencer can be more important than the influencer's accuracy. The silver lining is market reality. AI search engines want to succeed, which means drawing more users than the competition to attract more advertising investment. That requires establishing trust.

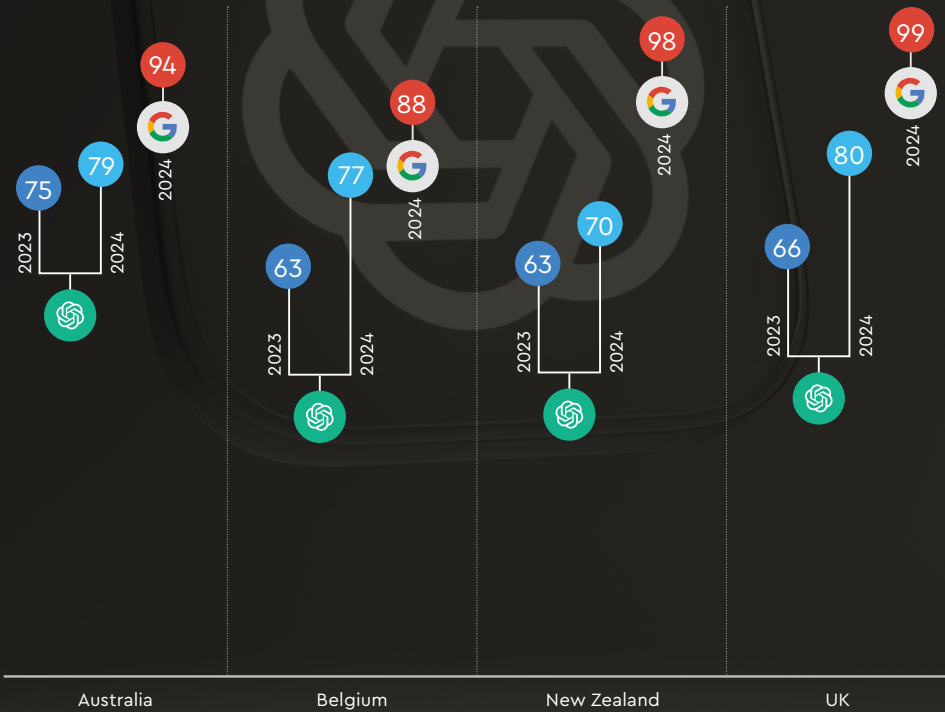
Although AI is wrestling control of the message from brands, brands still have agency. Brands must understand that search is always driven by a central truth: the human desire to search. Brands need to spend less time tinkering under the hood and more time thinking of search as an action that a human mind takes.

Brands need to help consumers discern fact from fiction by embedding in their own content signals of authenticity, accuracy, and trust. Brands must be accurate and robust providers of information to proactively shape and project their stories. The fundamentals for building strong brands don't change, but they need to be applied in a radically different environment.

AI IS GROWING AS A SEARCH ENGINE

While Google continues to dominate search, ChatGPT is gaining followers worldwide, particularly among people under age thirty-five.

ChatGPT vs. Google [Percent use]
Under 35



Source: WPP BAV USA, 2023, 2024, Adults under 35



BUILDING
STRONG
BRANDS IN
AN ERA OF

DISRUPTION

Defining a Disruptive Brand

Disruptive Brands defy category norms

HOW DOES A BRAND BECOME A DISRUPTOR? AND WHAT DOES A DISRUPTOR BRAND LOOK LIKE?

For WPP BAV, a disruptor brand looks like this:

A disruptor brand perpetually breaks away from the category norm, usually by serving previously unmet needs by offering unique solutions, until it ultimately redefines and surpasses the consumer's expectations of the category, creates new expectations, and changes the category.

BUT HOW? →

From thirty years of data, BAV derived nine global dimensions that drive brand influence. Among disruptive brands, Innovation is No. 1. Almost two-thirds of disruptor brands exhibit qualities connected with Innovation.

In addition, 58 percent of disruptor brands have a clear Purpose.

For disruptive brands, the rest of BAV's nine global dimensions are important in this descending order: Contemporary, Status, Authenticity, Fun, Performance, Accessible, Trust.

DISRUPTOR BRANDS SURPASS THEIR CATEGORY IN DIFFERENTIATION...

In 2014, just seven years after Airbnb was founded, consumers viewed the brand as more differentiated than the rest of the Hotels and Motels category. Disruptor brands are not just distinctive, easily identified by a catchy jingle or attractive logo. They are unique. Disruptors have a core identity that captures and holds consumer attention.

Differentiation

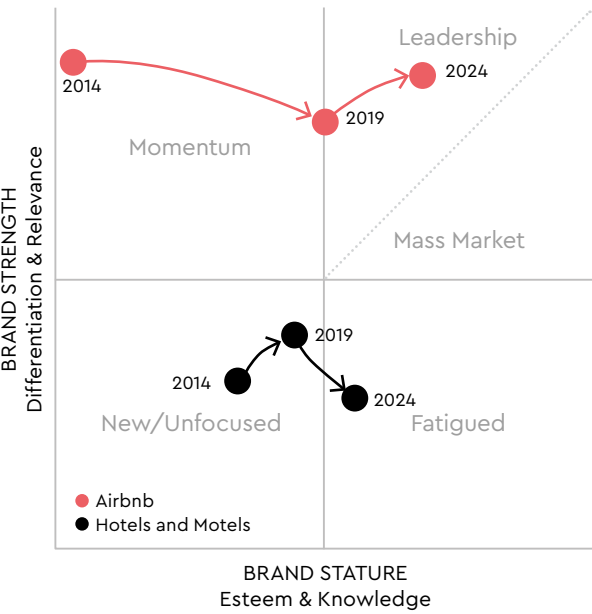


Source: WPP BAV USA, 2014, All Adults

... AND DISRUPTOR BRANDS SURPASS THEIR CATEGORY IN BRAND EQUITY

High brand equity propelled Airbnb from the Momentum quadrant of the BAV PowerGrid, in 2014, into Leadership quadrant ten years later. The Powergrid combines the components of brand equity—Differentiation, Relevance, Esteem, and Knowledge—on two axes, Brand Strength and Brand Stature. Consumers see brands with high equity as unique relative to the competition and better able to meaningfully meet their needs. Consumers know a lot about the brand and trust it.

Brand Equity



Source: WPP BAV USA, Multiple Years, All Adults

INSIGHT



John Keaveney
Global Managing Director, Analytics and Insights, VML
Global Head of Innovation, WPP BAV

Differentiated brands more likely to disrupt and survive disruption

We are in a period of disruption. No question. So many factors—the global pandemic, geopolitics, AI and other technology—have recently challenged us. The question is what's real change, what's temporary change, what's lasting change. Interestingly, our attitudinal studies reveal little fluctuation in our core values from before to after Covid. But certain categories and brands will be disrupted.

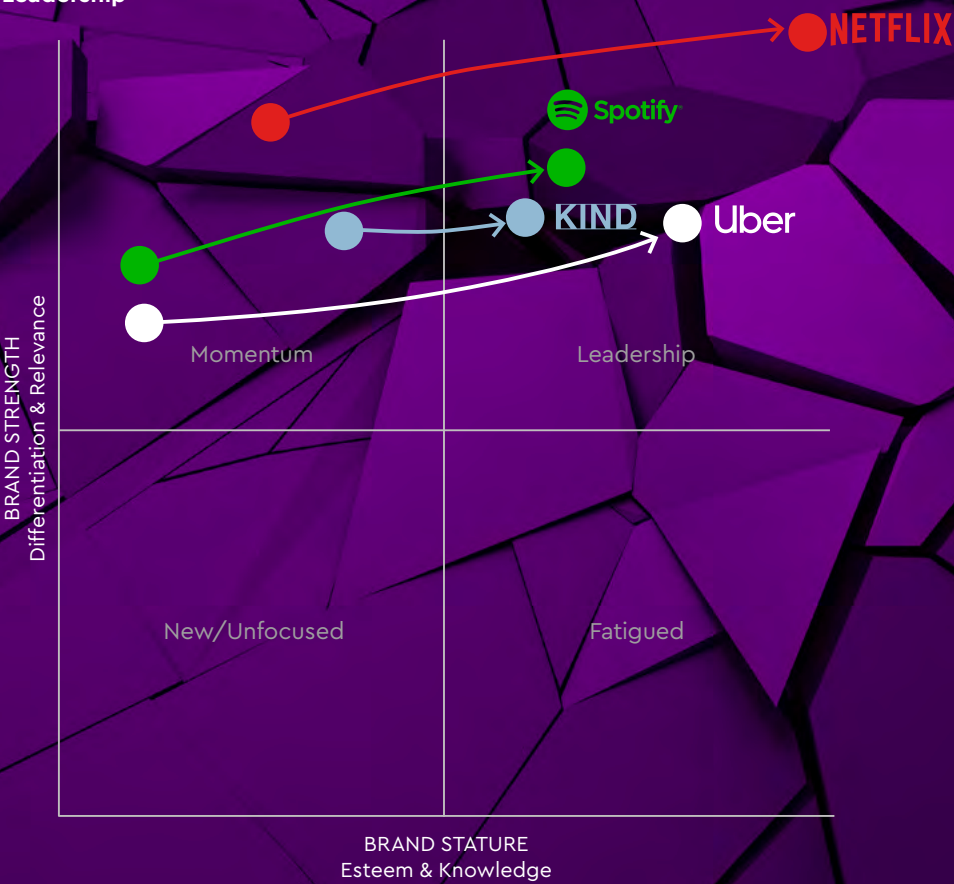
How does a brand know whether it's susceptible to disruption? Always an important question, it's especially relevant today. And we can answer with great accuracy by assessing the foundation of a brand's equity. How a brand scores on BAV's four pillars of brand equity—Differentiation, Relevance, Esteem, and Knowledge—determines where the brand sits on our Powergrid. Brands in the lower right quadrant, Fatigued, are more likely to be disrupted. So, how does a brand secure its place in the top half of the Powergrid, how does it achieve and sustain Momentum and Leadership?

The specifics will vary by brand. But in our studies of disruptor brands such as Zoom, Netflix, or Uber, they are all strongly differentiated. On BAV that means they're more than just Distinctive, i.e. easily identifiable—thanks to a compelling logo, slogan, or catchy jingle. Differentiation is in our view broader and richer than distinctiveness alone, and includes other assets such as Uniqueness, Dynamism, and Innovation. Brands with high Differentiation have a driving force, an animating belief, a reason for being, a clear purpose. Such are more likely to disrupt and to survive disruption.

ACROSS CATEGORIES HIGH EQUITY PROPELS
DISRUPTOR BRANDS INTO LEADERSHIP

Disruptor brands advance along a similar cycle in most categories. They begin as relatively unknown and underappreciated, gather momentum, and then begin to stand out as different. As they become better known, strong equity, the combination of Brand Strength (Differentiation and Relevance) and Brand Stature (Esteem and Knowledge), propels disruptor brands into leadership.

Leadership



Source: WPP BAV USA, Multiple Years, All Adults

Disruptors build worlds
that engage and endure



Janet Levine
Global Head of Invention,
GroupM's Mindshare

It's too easy to say that disruptor brands are winning and growing because they have "no rules." But the truth is that disruptor brands are highly strategic and use modern marketing strategies.

How? Disruptors build Worlds. This type of strategy, which we call *Worldbuilding*, sits at the convergence of Community, Culture, and Commerce to build enduring and engaging brands.

DISRUPTIVE COMMUNITY BUILDING: Smaller disruptors can't always afford mass and broad targeting and placement. Instead, they focus on going deep within key communities of various sizes, and decoding the shared values, passions, and language. The resulting content, experiences, and messaging are then designed *for, by, and of* community. For example, Starface reaches teens with acne by dismantling taboos to turn pimples into a neon yellow badge of honor. They also are an active ally of the LGBTQ community by selling rainbow star pimple patches all-year long and giving proceeds to queer non-profits.

DISRUPTIVE CULTURAL CREATIVITY: Smaller disruptors have healthy risk tolerance, and a scrappy mindset sparks ingenuity. Because these brands need to drive outsized impact, disruptors will earn the attention of communities through sharp insights and bold executions.

Disruption threatens even brands enjoying the greatest success

WHEN IS A BRAND SUSCEPTIBLE TO DISRUPTION?

Brands heavily invested in legacy systems and operations are particularly vulnerable because they tend to be less agile and responsive. Startups, entrepreneurs, and smaller businesses are more suited to seize new benefits but may lack the experience and financial capital to scale them.

Factors to help ensure that a brand responds well to disruption include a well-organized and agile supply chain along with executive and board leadership sympathetic to innovation and marketing.

A periodic check-up is prudent. And stretching the health analogy a bit further, it begins with vital signs, BAV's four pillars of brand equity: Differentiation, Relevance, Esteem and Knowledge. They fix the brand in the mind of the consumer, driving sales and shareholder value.

THE PILLARS COMBINE INTO TWO MUTUALLY REINFORCING DIMENSIONS: STATURE AND STRENGTH

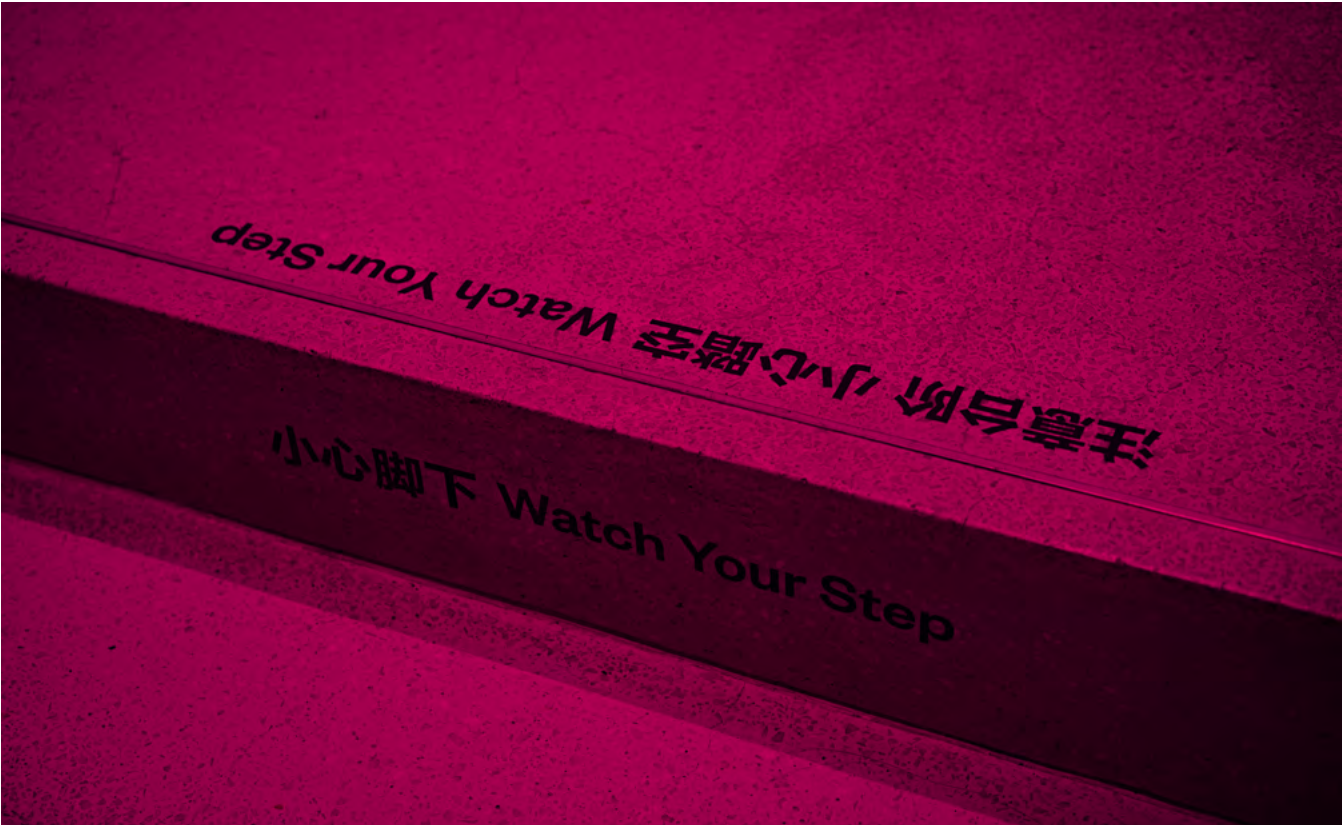
Brand Stature:

ESTEEM (being respected for leadership, reliability, and quality), and KNOWLEDGE (being understood) are key drivers of current value.

Brand Strength:

DIFFERENTIATION (capturing attention with a unique reason for being) and RELEVANCE (having application in my life) are critical for ensuring future growth.

Even among the most successful brands, the relative health of the brand equity pillars fluctuates over time with changes in the brand's category and culture. Vulnerability occurs when a brand becomes fatigued, commoditized, fades, or experiences another of the brand lifecycle syndromes that can erode brand equity. Crucially, even the most recognized and respected brands are not immune. →

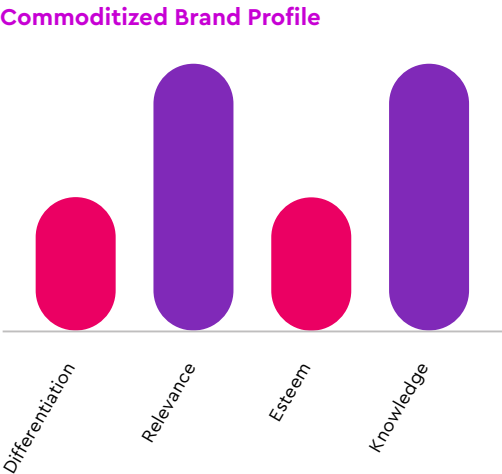


THREAT: COMMODITIZED BRANDS

COMMODITIZED BRANDS DON'T STAND OUT FROM THE COMPETITION

EXAMPLE: After launching as a New York bar, this brand reinvented itself as a casual dining restaurant and expanded rapidly in the US and other countries, attracting many imitators. The brand still scores high in Knowledge and Relevance because customers understand the brand's casual dining positioning. However, the brand struggles to revitalize and differentiate from competitors also struggling after the Covid Pandemic customer decline and subsequent changes in spending habits.

Source: WPP BAV USA, Full year ending Q2 2023, All Adults

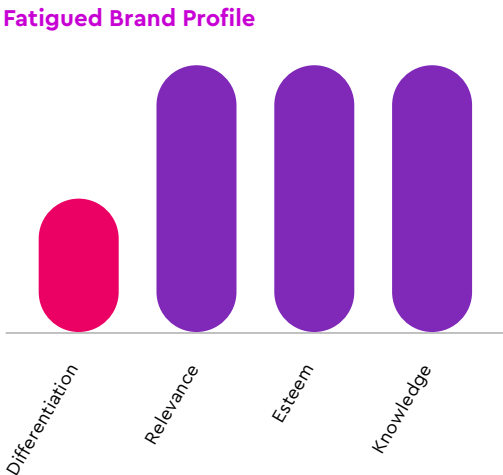


THREAT: FATIGUED BRANDS

FATIGUED BRANDS CAN BE VICTIMS OF THEIR OWN SUCCESS

EXAMPLE: A new brand disrupted the retail home improvement market over forty ago with large stores that disintermediated wholesalers and threatened the existence of traditional hardware stores. Today, with thousands of stores, the brand that reinvented its category is not always seen as different. Even a strong brand that has sustained leadership for decades can be vulnerable to the next disruptive idea.

Source: WPP BAV USA, Full year ending Q2 2023, All Adults

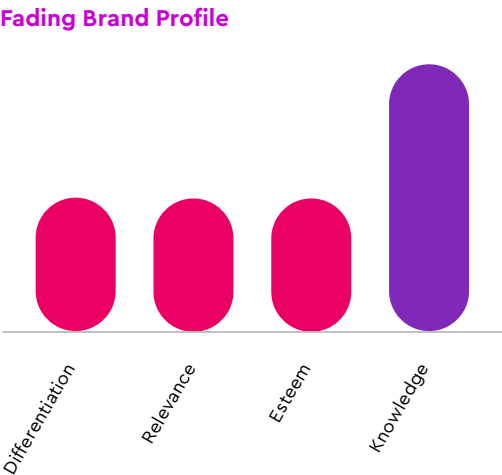


THREAT: FADING BRANDS

FADING BRANDS CAN'T GET BY ON FAME ALONE

EXAMPLE: Few brands were better known than this discount retailer. While being well-known by consumers is critical, Knowledge is just one of the four BAV pillars of brand equity. Today, the brand lags in Differentiation, Relevance, and Esteem. And Knowledge alone is not sufficient to drive brand growth. It can, however, potentially provide a firm foundation for rebounding.

Source: WPP BAV USA, Full year ending Q2 2023, All Adults





Andrew Missingham
Chief Data Insights Officer, AKQA Americas

INSIGHT

Disruption of basic global systems
will impact many brands

For disruption to cut through, oftentimes the incumbent has to be noticeably, damagingly bad. Looking to where this might be, Sub-Saharan Africa has provided excellent examples. For instance, it's where mobile phone brands leapfrogged wired telephony services making many places mobile-first. Or where mobile payment systems leapfrogged traditional banks because they better served the underserved.

We're seeing disruption to the very systems that have underpinned our stability for over 70 years. Heralded by the seeming end of "Pax Americana," this means individual regions and nations might have to rely less on globalization and more on self-sufficiency. The resulting disruption will likely impact consumer and B2B brands, all over the world. And maybe even the strength and stature of countries when viewed as brands.

I think the biggest disruptor of the first quarter of the twenty-first century is so ubiquitous it's almost invisible. The effect of the revolution that has put a powerful binary computer into the hands of almost every person in the world will likely only really be felt when it's displaced by the next technological disruption: the advent of quantum computing.

Brazil's Nubank
disrupted fatigued
banking category

When entrepreneur David Vélez encountered excessive bureaucracy while opening an account at a Brazil bank, he did more than complain to the manager.

He launched a competitor, the fintech Nubank. The brand aimed to lower barriers for financial services and instead cultivate customer relationships. It offered credit cards, online bank accounts, and other services.

The brand's attitude surprised and appealed to financially strained customers who'd learned to expect humiliation and rejection from banks. It attracted millions in deposits and major investors who helped fund expansion to other parts of Latin America.

That was twelve years ago. Following its successful IPO in 2021, Nubank now is an enormous fintech with 100 million users. It rivals the leading Brazilian bank brands, such as Itaú, Bradesco, and Banco de Brazil.

By identifying unmet local needs and empowering consumers, Nubank disrupted the banking category in Brazil, helped more people achieve financial stability, and built an international brand.

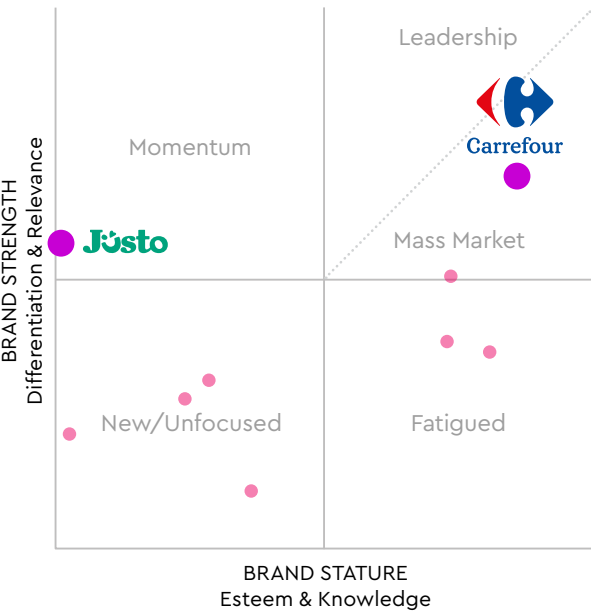
Similar disruption opportunities exist in other country markets, often in categories so entrenched, complicated, and comfortable that disruption seems impossible. The specifics vary by country but the conditions are similar.



FATIGUED CATEGORIES ARE
VULNERABLE TO DISRUPTION...

The Nubank disruption of Brazil's banking category followed the larger principle that fatigued categories are ripe for disruption, as shown in this chart of a retail category in Brazil.

BAV Powergrid | Brazil Retail Brands



Source: WPP BAV Brazil, 2024, All Adults

Disruption can break brand inertia, open growth opportunities

HOW CAN A BRAND BENEFIT FROM DISRUPTION?

It's very easy for brands—and even entire categories—to slip into a state of inertia, becoming fatigued and unfocused. Without strong brands, a category is at risk of commoditization, forcing companies to compete on price and causing margins to be squeezed.

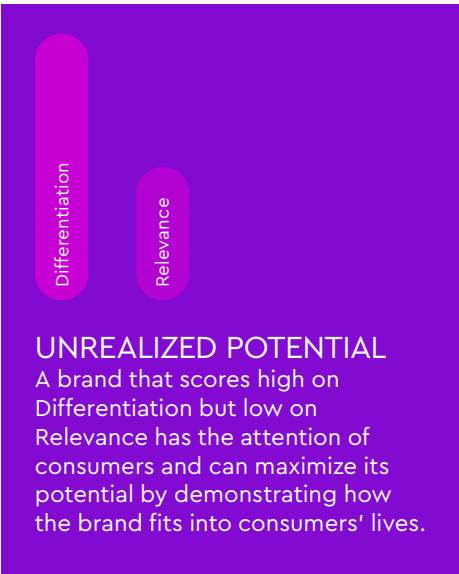
Disruption forces companies to break the inertia and can motivate the entire organization—not just the brand team—to take a step back and reassess the go-to-market plans. This is the perfect time to assess whether a brand stance is still relevant and has the power to stand out and move people, especially against new competition.

Disruptions provide an opportunity for innovation. While this typically leads to a disadvantage among established brands that react slowly, it creates new market opportunities and entry points for established and new players alike. For example, the cultural trend toward health and vitality disrupts the established beverage and snack players, creating openings for brands offering better-for-you alternatives (snacks and soda brands losing share to energy bar and nutraceutical beverages).

The growth opportunities are almost equally available but unequally capitalized on in the initial phases of disruption, with category leaders generally pursuing a fast follower or acquisition path to enter and compete in the new space.

Again, a periodic checkup is a good idea. When disruption alters the brand landscape it can also alter consumer perception of individual brands. By measuring changing consumer perception with the BAV pillars, brands can realign their strategies. →

Few brands are so present and influential in their category and culture that they score high in all four BAV pillars of brand equity. That distinction typically is reserved for the world's most valuable brands, such as Apple or Google. A checkup can identify brand fatigue, commoditization, fading, and other brand life cycle syndromes. The possibilities match the problems, as shown by these examples.

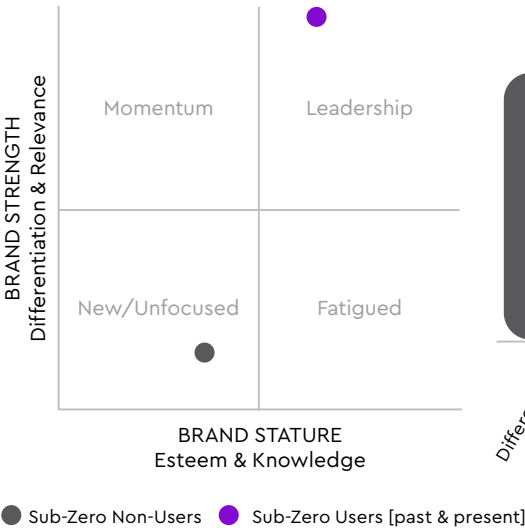


OPPORTUNITY: UNLOCKING UNREALIZED POTENTIAL

APPLIANCE BRAND IS A LEADER TO THOSE WHO USE IT, UNFOCUSED TO THOSE WHO DON'T

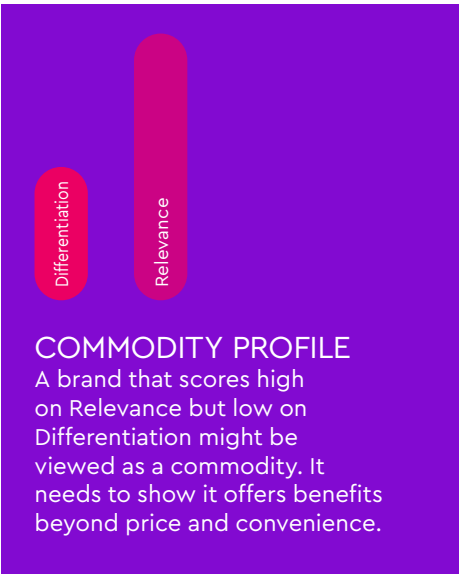
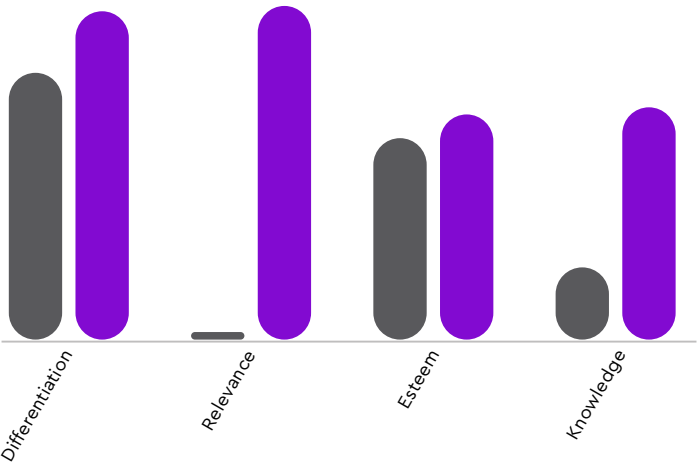
Around 40 percent of Americans said they would consider the premium brand Sub-Zero when buying a household appliance, but only 10 percent actually use the brand, according to BAV US 2024 data. Among past and present users, Sub-Zero is a leadership brand. But people who haven't used the brand's products see Sub-Zero as unfocused. Sub-Zero has an opportunity to become more Relevant to more people by explaining the brand's application to their lives. Sub-Zero is a well-regarded, eighty-year-old brand. How it proceeds is a business decision. These data indicate an opportunity, one that may be available to many brands.

BAV Powergrid | Sub-Zero



Source: WPP BAV USA, 2024, Sub-Zero Non-Users and Users

BAV Pillars | Sub-Zero



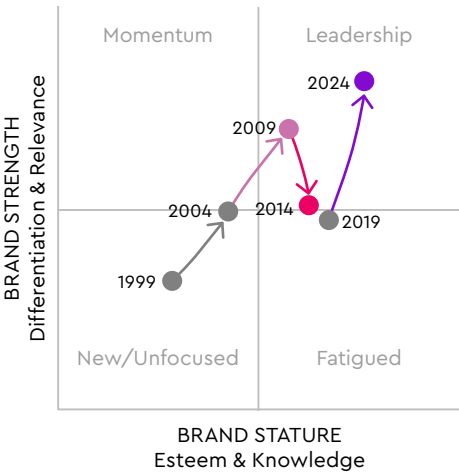
OPPORTUNITY: IDENTIFYING AND ADDING NEW CONSUMER BENEFITS

STRONG ATHLEISURE BRAND REBOUNDS AS PARTNERSHIPS DRAW ATTENTION

After climbing to category leadership during the first decade of the twenty-first century, Puma declined in the minds of Americans who viewed the athletic shoe brand as a commodity. But the brand returned to leadership quickly, balancing performance and fashion, and boosted by the athleisure trend with new partnerships that included Rihanna and Selena Gomez.

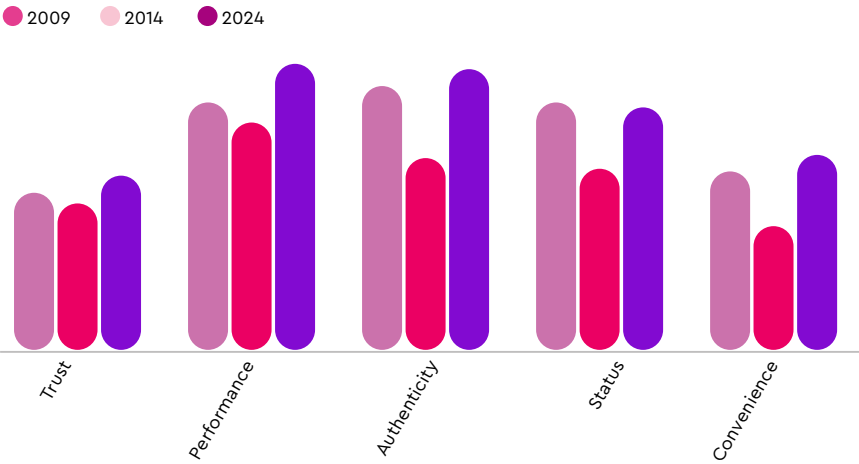
Puma is now among the top 18 percent of all US brands in Brand Strength, according to BAV 2024 data. Puma is an example of how a brand can disrupt itself and benefit from the reflected characteristics of the right partner while still retaining its core identity. People began to see Puma as more authentic, high performing, unique, and a good value. By 2024, people thought it was worth paying more for the brand.

BAV Powergrid | Puma



Source: WPP BAV USA, Multiple Years, All Adults

BAV Pillars | Puma



Esteem

Knowledge

WIDENING THE AUDIENCE

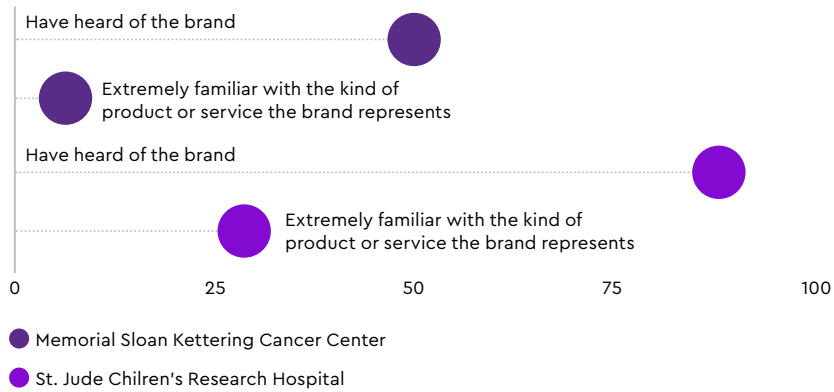
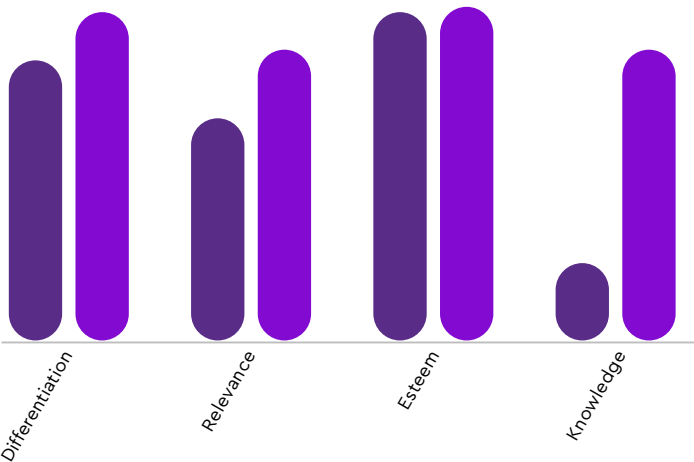
A brand that is high in Esteem and low in Knowledge, better liked than known, has an opportunity to introduce the highly regarded brand to a wider audience.

OPPORTUNITY: WIDENING THE AUDIENCE

RESPECTED INSTITUTIONS CAN WIDEN THEIR AUDIENCES

People who have heard of Memorial Sloan Kettering Cancer Center score it high in Esteem. People respect it for leadership and quality. Similarly, people rate St. Jude's Children's Research Hospital high in Esteem. However, only around half of Americans know about MSK, while 91 percent have heard of St. Jude's, according to BAV US 2024 data. Of those who've heard of MSK, less than 10 percent are deeply familiar with and understand its offerings compared with around one-third for St. Jude's. These findings indicate that, viewed as brands, even prestigious institution have opportunities to reach wider audiences.

BAV Pillars | MSK and St. Jude's



Source: WPP BAV USA, 2024, All Adults

INSIGHT



Irene Bizzotto
Business Strategy Director, AKQA

Unpredictable markets demand long-term view

Europe is facing disruptions that extend beyond consumer behavior, with geopolitics becoming a major force reshaping industries. For example, the evolving US-Europe defense relationship is driving growth in defense-related sectors, supported by rising venture capital investment in defense tech startups.

Meanwhile, climate tech is undergoing a major funding recalibration, with investment dropping 40 percent year-over-year in 2024 to its lowest level since 2020. These shifts underscore a critical reality: global events are no longer external pressures—they are at the core of business strategy.

Brands must avoid short-term overreactions to disruption. Instead, they should adopt long-term strategies supported by predictive and adaptive analytics to anticipate trends and pivot in real time. Leaders who focus beyond immediate pressures can build resilience and position their brands for sustained success in an unpredictable market.

Disruptions present opportunities for smaller brands, but the widening R&D gap between large and small companies poses significant hurdles. In Europe, larger firms dominate R&D spending, leveraging economies of scale, access to talent, and advanced technologies.

Hoka disrupts category known for strong brands

Some categories are more vulnerable to disruption.

They exhibit overall sameness with multiple brands clustered in the Fatigued quadrant of the BAV Powergrid. Categories with many legacy brands, like airlines and banks, often fit this pattern.

NOT THE ATHLETIC WEAR CATEGORY.

In fact, the Athletic Wear category ranks high in Momentum, which means that its brands are typically high in Differentiation and Relevance, the key ingredients of Brand Strength.

Among brands dominating the category, brand equity peers include Apple, Amazon, and Coca-Cola, an exclusive coterie that has escaped sameness to become unique in the consumer's mind.

But consider Hoka. At a time when running shoe brands were focusing on minimalist styles, some so minimalist they promised the feel of running barefoot, Hoka introduced maximum cushioning.

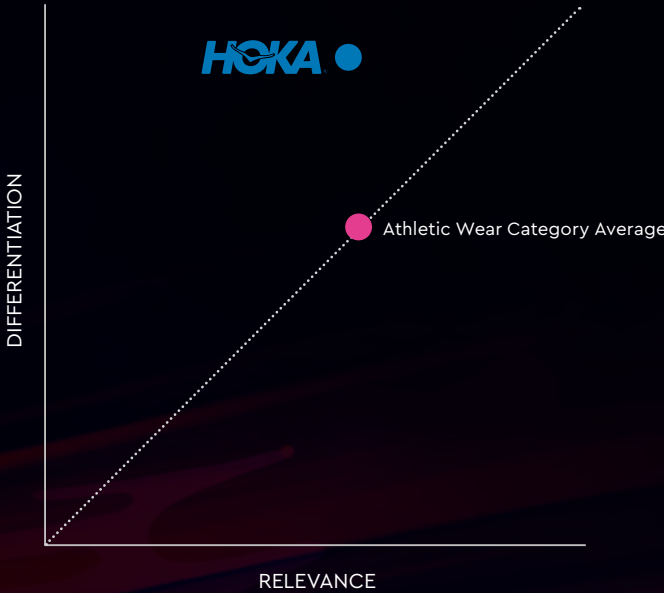
The different design added a meaningful benefit for people who wanted to lessen the impact of running or also use the shoes for walking comfort.

Soon, Hoka, a brand launched in 2009, competed effectively with long established heritage brands. Hoka exemplifies how a brand can disrupt even categories with high equity brands.

HOKA ACHIEVES HIGH DIFFERENTIATION...

In around fifteen years, Hoka became as relevant as most brands in the Athletic Wear category and much more differentiated. Disruptor brands generally have higher Differentiation than Relevance.

Hoka Differentiation

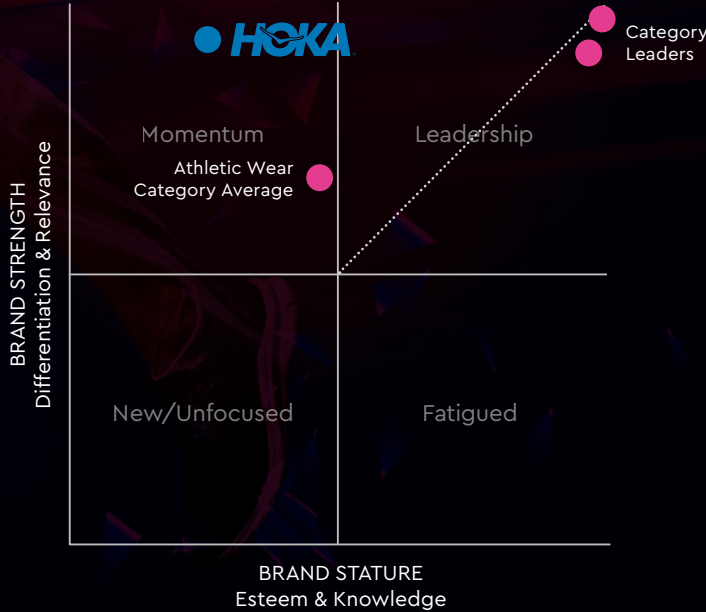


Source: WPP BAV USA, 2024, All Adults

... AND IT FAR EXCEEDS ITS CATEGORY IN MOMENTUM

Hoka far exceeds the Athletic Wear category average in Momentum. As more consumers learn about and respect the brand, Hoka may compete for category leadership.

Hoka vs. Category Leaders



Source: WPP BAV USA, 2024, All Adults

City-centric disruptors test national brands

LOCAL IS BECOMING **HYPERLOCAL**

When global marketers adapt their brands for consumer preferences in various countries, local brands often compete by relying on their deep country market knowledge. Today, however, these locally connected brands are themselves susceptible to disruption by hyperlocal brands.

Driving this trend seems to be a revision in how people think about personal identity, with local affinity strengthening and as distrust in government increases. Brazil's leading health and beauty brands, Boticário and Natura, illustrate this development.

Both compete throughout Latin America and in other parts of the world, but they are closely associated with Brazil. Boticário, founded in 1977 in the south of Brazil, offers unique local fragrances. Since 1969, Natura has built a brand around the combination of local natural ingredients and science.

Boticário and Natura brands successfully compete against larger multinationals because they're closely connected with consumers, not only for the usual reasons—such as price, convenience and product efficacy—but also because of the door-to-door foundation of their distribution, which also includes brand-owned stores, franchises, and online channels.

In addition, the purchase of a Boticário or Natura product from a relative, friend, or neighbor not only strengthens the customer's personal relationship with the brand, but it also supports the economic wellbeing of the community. The brands are well positioned, if not entrenched in the Brazilian market. But they're not invincible.

They're being challenged by disruptor brands closely associated not with Brazil, but rather with local parts of the country, specifically with São Paulo and Rio de Janeiro. These disruptor brands include Pink, a brand by influencer Bruna Tavares. Bruna Tavares is from Rio de Janeiro. Her brand resonates with the city's personality. Victoria Ceridono, another influencer, projects the urbanity of São Paulo. Julia Petit offers a brand called Sallve.

These influencers are able to rapidly launch highly localized products and content.

Besides being sold online, some of these brands are also available on the shelves of physical stores adjacent to mass market brands. But their messaging is more economical and simplified, with consumers providing much of the content.

The hyperlocal brands also reinterpret, in the virtual world, the essential Boticário and Natura strength of door-to-door selling. Friendly face-to-face conversation still happens, but online.

The influencers don't present themselves as celebrities. They attempt to connect with customers authentically, so customers don't feel this is who I aspire to be, but rather this is who I am.



Carolina Silva
General Strategy Director, DAVID São Paulo

INSIGHT

Honesty with customers
is best disruption defense

Today, no category is immune to disruption. In Brazil we see disruption everywhere, from banking to beauty and even with chocolate. Brands that want to play in a disruptive environment must first truly understand what's going on in people's minds. We are in a period when you cannot pretend to know more than your customer. People know how communication and branding work. They will catch on if you are not truthful with them.

We are past the point where people are looking for an aspirational message. A brand's attempt to be aspirational could be misconstrued as condescending. People are more receptive to genuine local voices they can identify with. They are less receptive to a celebrity spokesperson than to a person whose striving for a better life matches their own experience.

In a disrupted environment we should focus on what's true for people and us. That will be more effective than trying to teach people something or steer them in a different direction. It's much better to be straightforward with consumers about how we can make their lives easier or and help them solve problems.



Global brands act local
with humility, humor

Consummate insiders, hyperlocal brands share the local community's values, language, behaviors, even inside jokes, compounding challenges for multinational brands.

But with sensitivity, humility, even humor, many multinational brands have communicated their desire to serve local communities and willingness to understand local nuances.

When KFC in Romania noticed that a particular route on a subway map formed the shape of a chicken drumstick, the brand launched a program that offered coupons and other benefits to riders on that subway line. The promotion earned attention and drove sales.

Coca-Cola recognized the initiative of small shop owners who created local interpretations of one of the world's most recognized logos. Rather than demand adherence to its creative specs, Coke adopted the local variations for a global campaign in ads and even on billboards in locations including Mexico City.

Nike's "Nothing Beats a Londoner" campaign combined local people and star athletes to localize the global.

Rural India possesses disruption possibilities

CHINA-INDIA COMPARISONS ARE UNAVOIDABLE, BUT IMPERFECT.

Both China and India have entrepreneurial, well-educated workforces. Both countries are home to over 1.4 billion people, with India narrowly surpassing China. Serving large populations has taught industries in both countries how to make quality products at an affordable price.

But it's the differences between the countries that may signal India's disruption potential.

Since the reform economic policies implemented almost fifty years ago, China has lifted over 800 million people out of poverty. While attempting to balance a production-driven economy, the nation produced a rising middle class of aspirational consumers eager to own the newest and shiniest products. China is starting to export some of those products, like cars, particularly EVs.

India's economic development proceeds more slowly, but its consumers also know about the latest products. Poverty limits the purchasing power of some, but not their aspirations. Unlike China, the disruptive potential in India may lie not in dense cities and a rising middle class but in India's vast rural population and in jugaad, the Indian entrepreneurial workaround spirit.

The internet and social media enable people, regardless of financial status, to be aware of and potentially desire the same products and brands. Regardless of financial circumstances, people may prefer the same shampoo brand, but based on affordability, may choose a twelve ounce bottle or several sachet-size packages.

Until recently, insurance brands focused almost exclusively on India's urban middle class. Technology enabled insurers to reach people in rural areas and offer affordable products to a low-income underserved population. When traditional insurance customers in urban areas became aware these lower-priced products, they began to question the higher prices they'd been paying.

The ability to cost-effectively meet the needs of underserved markets potentially opens opportunities to disrupt categories in India with products that offer the middle class greater value. And it opens up opportunities abroad, exporting desirable products at affordable prices to the developing markets of Asia and Africa.

INSIGHT

Affinity drives brand choice for skeptical Aussie consumers



Jane Jacob
Head of Strategy, Ogilvy, Sydney

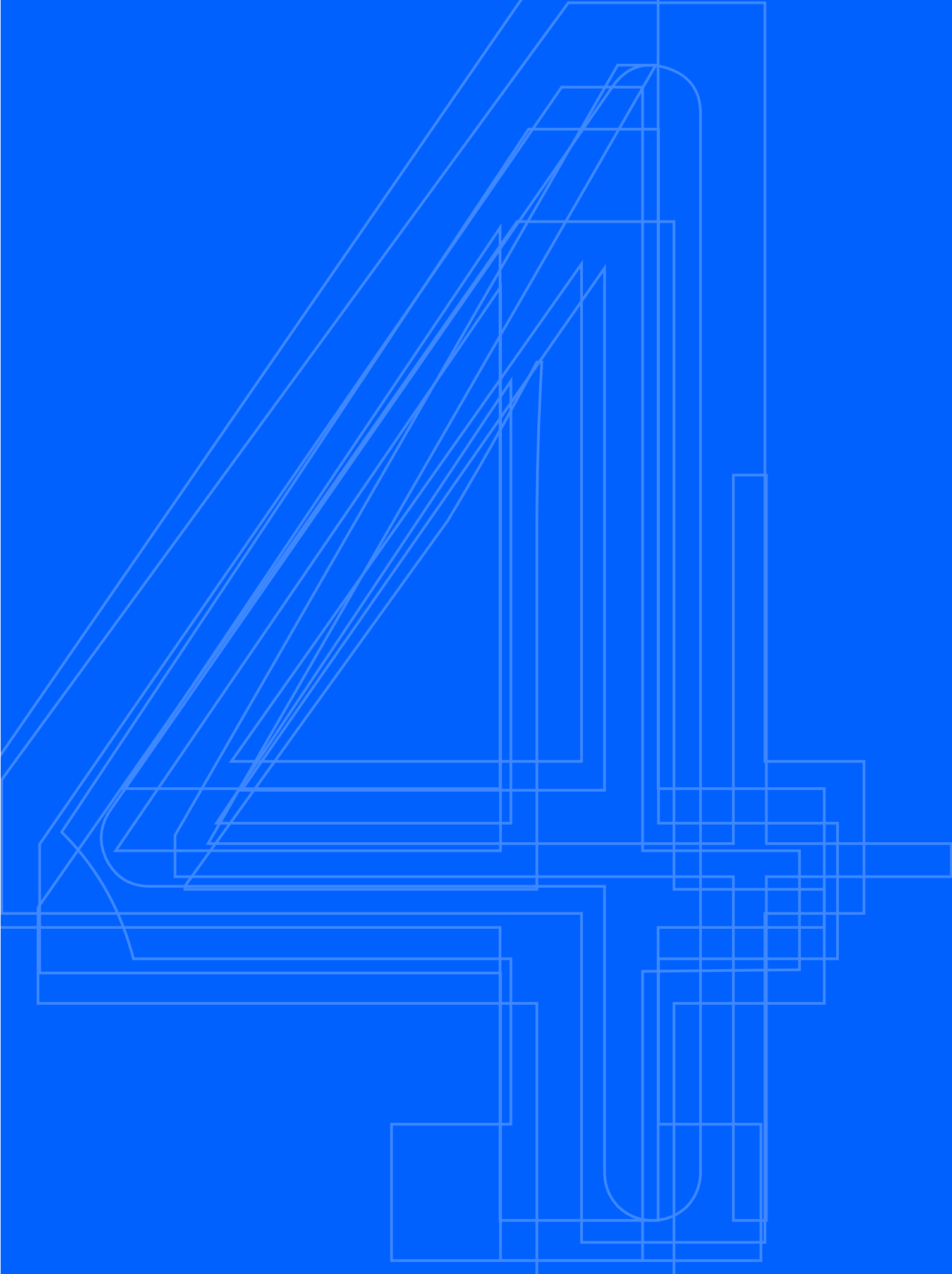
Lack of trust is driving disruption in Australia. We're experiencing a cost-of-living crisis so extreme and for quite some time that there's even a local term for it, *Cozzi livs*. But Australians aren't looking to the government or traditional institutions to navigate this pressure. Interestingly, they're looking to family, friends, neighbors, and TikTok or—"the socials"—for advice.

In a recent study we conducted, we interestingly found that people are prioritizing affinity over authority when it comes to making decisions across all categories. This begs the question: are we really getting the right information to navigate these times?

So, what does this mean for brands? The ones that are successfully connecting are those who take the time to see and genuinely care about where people are at. They offer solutions that are relevant to the current challenges, and some have even become beacons of trust.

Australia's most trusted brands includes Bunnings, the home improvement retailer, according to a recent BAV study. Bunnings excels at creating a brand with key assets that are instantly recognizable. But more than that, it empathizes with customers in a way that truly matters—by offering great prices. And it show ups and connects in culture, bringing a much-needed smile or laugh, using only Aussie can do humor.



An abstract graphic on the left side of the slide, consisting of numerous thin, white, overlapping lines that form a complex, geometric pattern. The lines create a sense of depth and movement, resembling a stylized architectural structure or a series of nested shapes.

CONCLUSIONS & ACTION POINTS

Disrupt the brand before it's disrupted

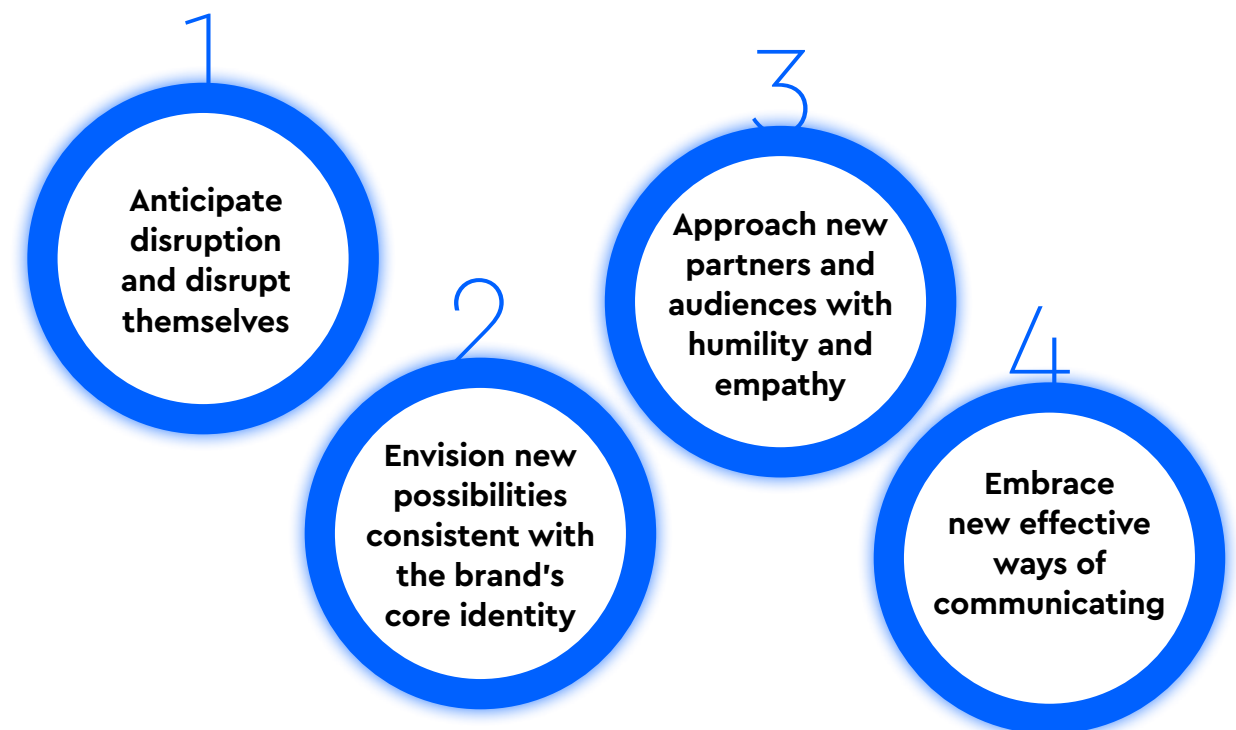
Differentiation,
innovation
power renewal

DISRUPTION IS UNAVOIDABLE

It's not just a phase in the marketplace. It's the rhythm of the universe. It's the cycle of the seasons, with creation then destruction and renewal. It's personal life, with the daily fluctuations and monumental ups and downs of joy and loss.

Disruption tempts us to retreat into our comfort zones or forces us to encounter new possibilities. The comfort zone is a dangerous place for brands. It produces bland sameness that bores consumers, who quickly lose interest.

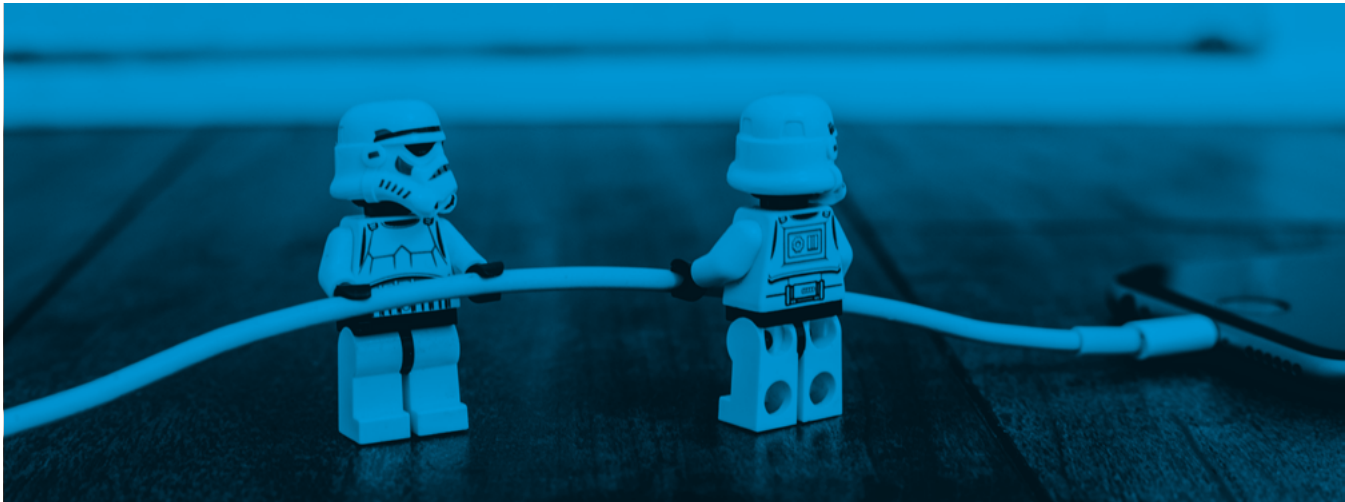
SUCCESSFUL BRANDS AVOID THE COMFORT ZONE AND INSTEAD:



PERPETUAL DISRUPTION AND RENEWAL

Apple offers an instructive model for self-disruption. Few brands achieve Apple's brand equity strength and market value, but any brand can learn from how Apple perpetually disrupts itself with innovative products and services.

Perpetual disruption is part of Apple's identity. The brand progressively discards some devices while introducing others, retiring the iPod in favor of the iPad. No matter how unique, each new device or service exhibits the recognizable Apple characteristics people expect. Each reflects the founding vision of impeccable design, engineering, packaging, user-friendly interface, and reliable support. It's as if the final question before a launch is, "What would Steve say?"



For another well-known, self-disrupting brand, the question could be "What would Ole say?" Ole Kirk Christiansen was a Danish carpenter. Struggling to make a living during the Great Depression, he came up with a children's building block idea—Lego, now the world's largest toy maker by revenue.

Like Apple, Lego introduces innovative products and services that are consistent with the brand's identity. Early in the twentieth century, it introduced its first licensed product, *Star Wars* figures. It operates retail stores and amusement parks and has partnered with Disney on an imagination center at Florida's Walt Disney World, as well as on Lego models of Disney characters.

The Lego brand is almost a hundred years old. Its longevity results from being able to continually disrupt itself with innovation that drives its strong Differentiation.

The plastic blocks themselves symbolize the perpetual cycle of building, disrupting, rebuilding.

NEW DISRUPTIONS

Today, China, India, and other nations that formerly produced cheap products increasingly export branded merchandise of high quality at a competitive price. Meanwhile, traditional country-of-origin advantages—France, fragrance; Italy, design; Germany, engineering—may begin to fade over time as faith in government declines worldwide.

The brand landscape is in flux. New brands appear all the time and from anywhere, appealing to changing consumer preference for authenticity and local connection, and enabled by ever more powerful technology. The challenge of building strong, enduring brands is compounded when a brand story discovered through online searches can be an aggregate of random information scraped by an AI search engine.

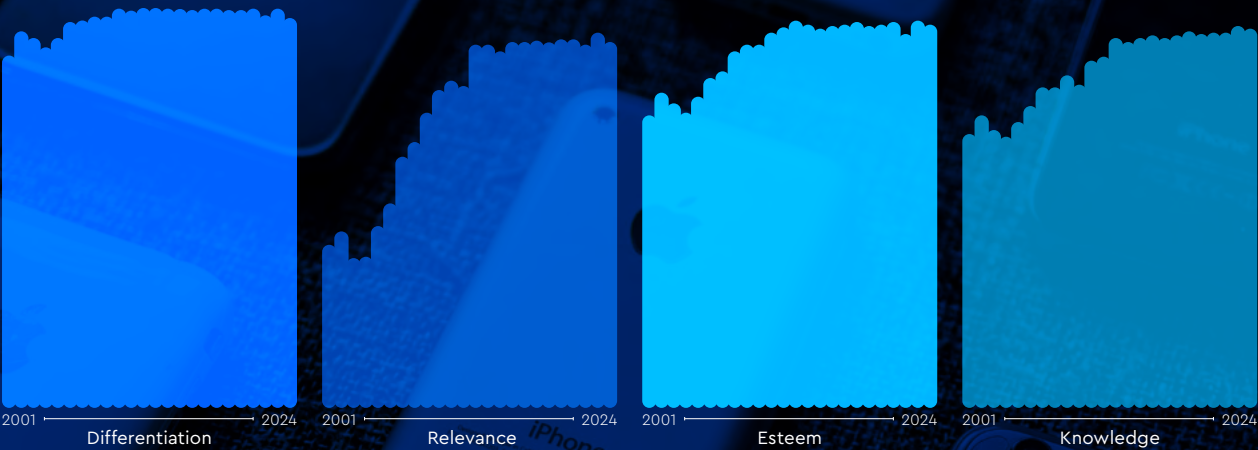
Brand preparation for disruption or self-disruption requires introspection, asking the right questions, knowing how the brand is situated relative to other brands in the category and culture. Is the brand sufficiently differentiated or too commoditized? Is it fading or starting to fatigue?

The answers can reveal unrealized potential to inform business decisions that enable brands to anticipate disruption, turning a potential threat into an opportunity for sustained growth in both the marketplace and stock market.

APPLE GREW AND SUSTAINED BRAND EQUITY OVER THE PAST QUARTER CENTURY...

Over the disruptive first quarter of the twenty-first century, Apple increased and sustained its strength in the four BAV pillars of brand equity: Differentiation (capturing attention with a unique reason for being), Relevance (having application in my life), Esteem (being respected for leadership, reliability, and quality), and Knowledge (being understood). With the iPhone launch in 2007, the Apple brand grew sharply in Relevance as people understood how the device could improve their lives.

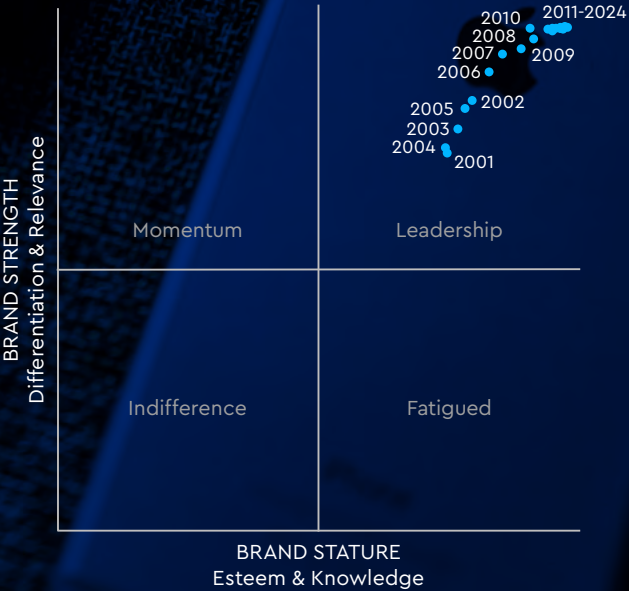
Apple Brand Pillars



... AND APPLE MAINTAINED LEADERSHIP IN ITS CATEGORY AND BEYOND

The four BAV brand equity pillars combine into a Powergrid that measures Brand Strength and Brand Stature. During the first quarter of the twenty-first century, Apple maintained its position in the Leadership quadrant. This accomplishment is rare for any brand. For example, over half the brands in the Leadership quadrant in 2014 fell out by 2024. Apple didn't sustain its leadership only because of the quality of its devices. It kept disrupting itself as it formed an ecosystem of devices and services that express the brand's core identity: impeccable design, engineering, packaging, user-friendly interface, and customer support. The resulting brand equity strength enables Apple to perpetually disrupt itself, redefine its category, and set new standards that transcend its category.

Apple PowerGrid

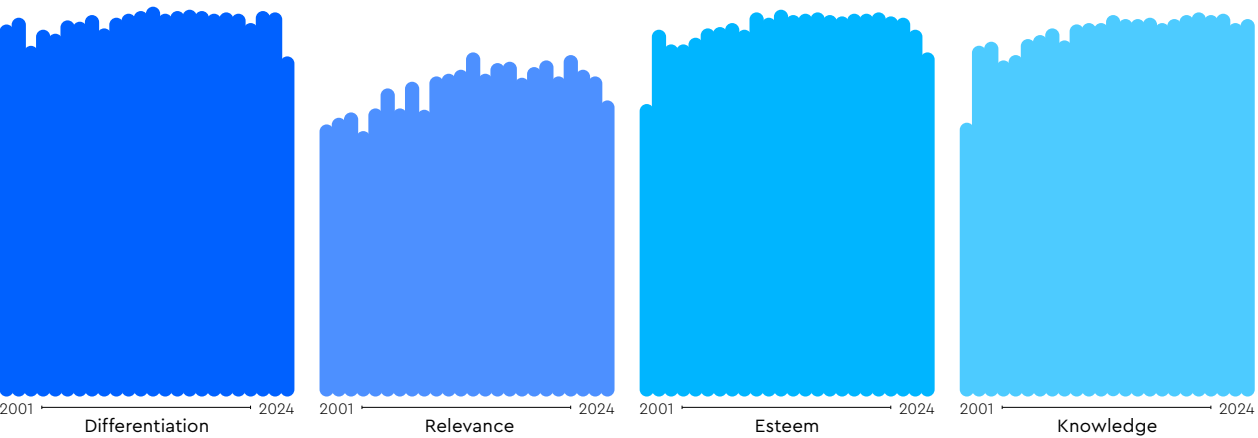


Source: WPP BAV USA, Multiple Years, All Adults

AT ALMOST AGE 100, LEGO ALSO GREW AND SUSTAINED BRAND EQUITY...

Like Apple, Lego has sustained strength in all four BAV pillars of brand equity during the disruptive first quarter of the twenty-first century. While remaining consistent with the brand's core values of creativity and imagination, Lego continually disrupted itself with new licensed products and partnerships with Disney and other major brands.

Lego Brand Pillars

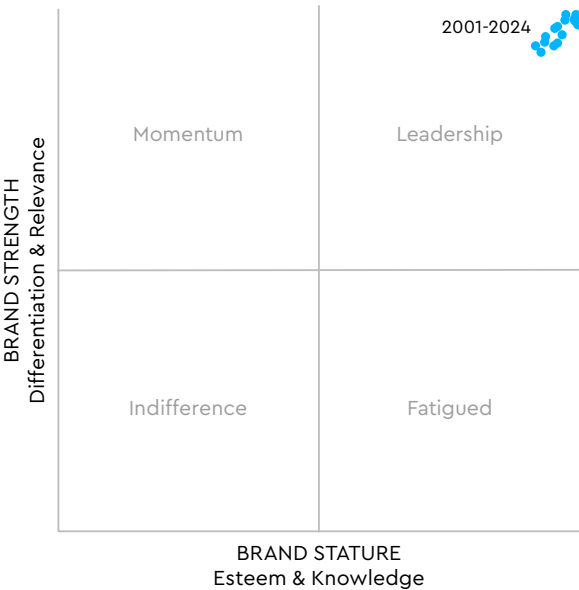


... INNOVATION DIFFERENTIATED THE BRAND AND SUSTAINED ITS LEADERSHIP

During the first quarter of the twenty-first century, Lego also maintained its place as a category leader, with little variation in its extremely high level of Differentiation, Relevance, Esteem, and Knowledge. This accomplishment, rare for any brand, may be unprecedented for a brand that's only a few years shy of its one hundredth birthday. Lego's longevity results from being able to continually disrupt itself with innovation that drives its strong Differentiation.



Lego PowerGrid



Source: WPP BAV USA, Multiple Years, All Adults



Jake Myhre
Strategy Partner, Design Bridge and Partners

INSIGHT

Brands can turn pain points into advantages

As we reach the mid-point of the decade, it feels safe to say that for many our (Twenty) Twenties haven't yet been as "Roaring" as we might have hoped.

With the strong headwinds we face, consumer pain points are stacking up. Gaps that cause negative impact on the daily lives of people around the world. Increasing living costs and decreasing time spent socializing, to name a few.

These are pain points that brands have the opportunity to grab by the horns. By positioning themselves as part of the solution, rather than the problem. In turn, unlocking competitive advantage and deepening emotional appeal.

PAIN POINT 1: COST OF LIVING
With consumers facing greater financial stress... pursuing "shrinkflation," quality short-cuts and price slashing, can be a race to the bottom. For many smart brands, rather than attempting to come across as "cheaper," they are doubling down on why they're "worth it."

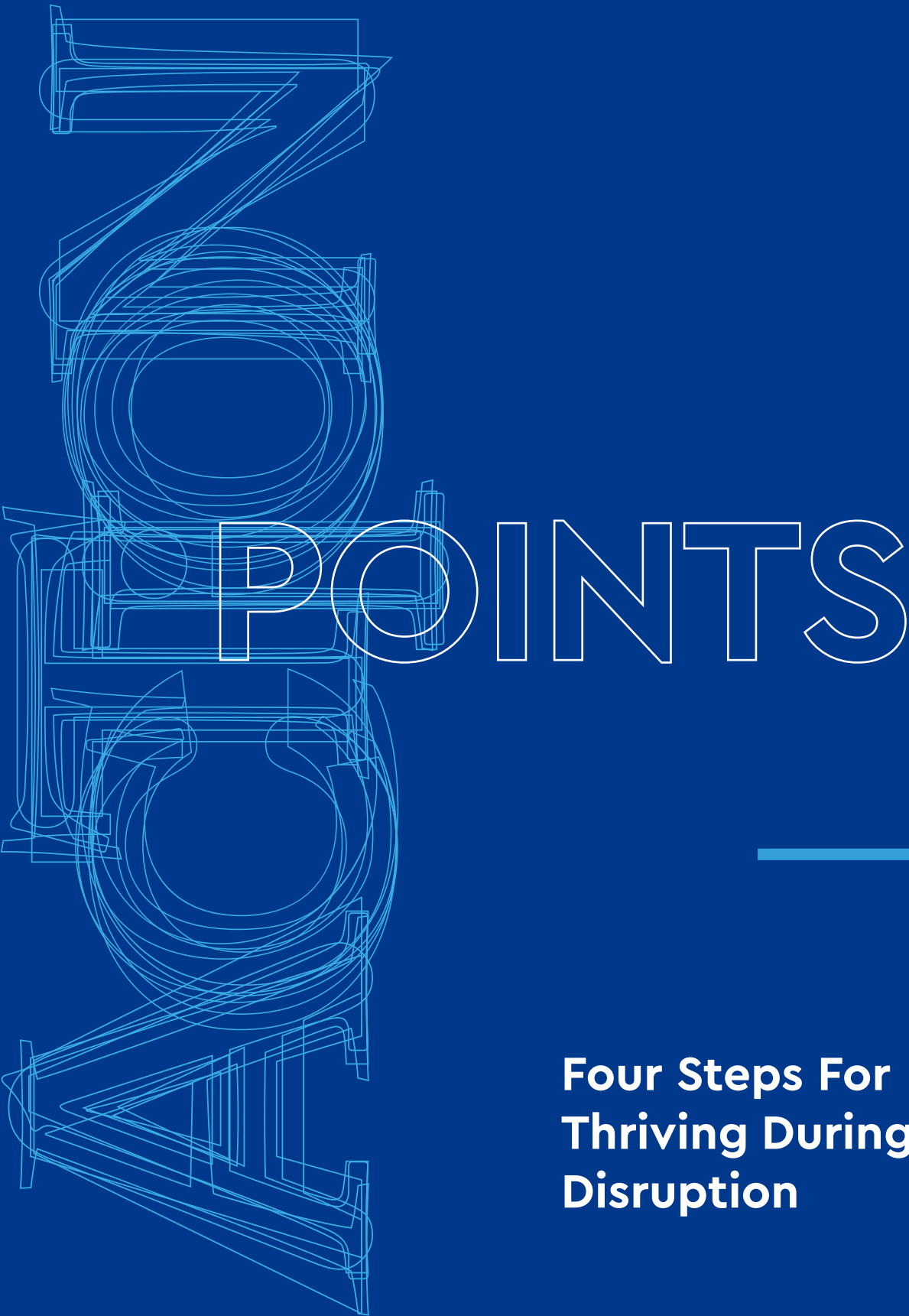
Now more conscious and careful with their money, some consumers with tight budgets may respond with a "flight-to-quality." Seeking offerings that will work better and last longer. Taking a "fewer but better" approach to consumption.

For brands, this means fine tuning their utility. Clearly articulating the customer value they create and how their functions and features are superior to the competition. In turn, strengthening their ability to justify their price premium.

PAIN POINT 2: SOCIAL ISOLATION
It's clear that the pandemic has triggered some fundamental shifts in the way people live and work that are here to stay. For many, this has meant spending more time at home, and less out-and-about with others.

What the long-term impacts of this will be, remain to be seen. But, one thing we are pretty confident about, is that "consumption will continue to be a social act" (Tati Lindenberg, Unilever). In the face of a deficit in human connection, brands have the power to bring people together.

As social media's ability to act as a satisfying proxy for human connection continues to wane, brands have a real opportunity to create meaningful experiences that foster connection. We are "social animals," after all.



Four Steps For Thriving During Disruption

STEP ONE: STAND ALERT

Don't get too comfortable

Be attuned to what's looming in the category and culture. Have the courage to ask the right questions and resist taking refuge in the comfort zone or self-delusion. Even successful brands are vulnerable to disruption.

Anticipate disruption

Be clear about what the brand stands for, its reason for being, the foundation that needs to endure no matter how fiercely disruption threatens. Disruption isn't always comfortable, but it's as inevitable and unavoidable as a destructive weather event.

Meet disruption with disruption

Disrupt the brand before another brand or market circumstances force its disruption. It's more advantageous to manage disruption as the disruptor rather than as the disrupted.

Differentiate

Be introspective. Be able to tell customers why the brand exists and how it makes their lives simpler, happier, or in some way better. Differentiated brands thrive.

Innovate

Be open to new ideas and willing to take risks. Innovate, but ask if the innovation, no matter how brilliant, is one that customer will expect from the brand as a recognizable expression of the brand's core reason for being.

STEP TWO: ENVISION POTENTIAL

Seek opportunities

Be open minded. Identify all the risks of disruption, but also the opportunities. Easier said than done. It's difficult to feel grateful in the middle of disruption, but disruption can be the motivating force a brand needs to make positive change.

Resist the past

Seek new solutions. In the middle of disruption, it's human to reflexively rely on, even double down on, whatever worked in the past. But it's counterproductive to work harder at the same old thing, hoping for a different result.

Focus on now

Stay flexible. It feels counterintuitive not to look far into the future, and the long view is still important. But signals in the brand category and culture change quickly. In that sense, the close-up view is more useful.

Shelve the ax

Be careful hunting for efficiencies. Disruption too often prompts businesses to cut costs. But programs that looked like waste may suddenly become critical when they're gone.

HUMILITY

STEP THREE:
KEEP
LEARNING

Understand people
and communities

Connect with people. Learn the cultural signals, the insider jokes. Brands that take the time to understand people are more likely to earn their attention.

Seek partners or
acquisitions

Reach out. One way to succeed in a niche or local market is to invest in brands that have already connected with people and gained their trust.

Act with humility

Park the corporate guidelines. Respect the brands you partner with or purchase. That's the best way to get what you expect—the unique connection to local customers. Support the local brand, learn from it to grow together. Then apply the lessons to the rest of the business.

Think local,
act local

Update the slogan. Twenty years ago, the slogan "Think global, Act local" guided corporate thinking. Today, people feel more connected locally than globally or even nationally. Instead of a top-down approach with national or global messages pushed into local markets, it's more effective to find an idea that creates local excitement and introduce it to a wider audience.

STEP FOUR:
EARN THE RIGHT
TO BE HEARD

Unify the message

Earn attention

Be always-on

Be distinctive

Show humanity

Coordinate paid and earned messaging. The messages in various channels should complement or amplify each other. That means the brand marketers need to coordinate.

Review media choices. The future of media and marketing is not campaigns. Campaigns are fast, fleeting, and finite. Rather than trying to force attention with expensive messaging across media, it's more effective to earn attention.

Get in front of the exact right audience at the exact right time. Purchase decisions today are not just about product performance, packaging, and pricing. To build strong brands in this new world, it's wise to have an always-on, social-first marketing approach.

Resist using familiar design tropes or typefaces. With rapid deployment of AI and other tools making brand messaging and collateral more generic, it's vital for brands to find original ways to look distinctive, form emotional connections, and move people.

Cultivate affinity. Young people don't automatically choose the same brands as their parents used. They often choose brands that they believe are giving something back or have some purpose beyond offering a good product at a good price.

MESSAGING



RESOURCES & CONTACT DETAILS



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