

Ogilvy
On

The Four Dimensions of Loyalty

How fostering Principle, Potential,
Culture, and Community increases customer
loyalty—without a rewards program

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True loyalty is earned, not bought. Many brands confuse loyalty with repeat transactions, relying heavily on incentives, discounts, or convenience as measures of success. But genuine loyalty is more profound—it arises from meaningful relationships built on emotional resonance, shared values, and authentic connections.

Consumers experience loyalty differently. For some, loyalty exists simply because no better options are available—they feel trapped rather than connected. Others may cycle through various options, driven solely by practical considerations and convenience, without forming a more profound attachment. Yet some consumers develop lasting, genuine loyalty because a brand consistently fulfills its promises, aligns deeply with its personal values and creates meaningful, memorable experiences.

This document introduces an evolved understanding of loyalty, shifting focus from transactional interactions to intentional relationship design. It will explore the connection of two critical frameworks and deep dive into the newly introduced ones that drive loyalty over time. The first is the existing Ogilvy framework that defines the four bonds of loyalty, which reveal how loyalty psychologically forms. The newly introduced and researched

four dimensions of loyalty, which include emotional connection, shared values, consistent experience, and mutual growth, determine why and how loyalty endures over time.

By embracing these frameworks, brands can move beyond superficial engagement and cultivate enduring connections grounded in principle, personal growth, cultural alignment, and community belonging. This transformation of loyalty from a mere retention strategy into a lasting competitive advantage that fosters true belonging between brands and consumers is not just a possibility, but a powerful reality waiting to be harnessed.

We understand that your time and attention are valuable. That's why we've crafted this guide on designing lasting loyalty, to ensure that every moment you create with your customers is worthwhile and enriching.

THE FOUR DIMENSIONS
OF LOYALTY

Beyond transactions: The science and strategy of loyalty



Our misunderstanding of loyalty today stems from how we've framed the problem. Technological advancements have blinded us to its changing essence, reducing it to a marketing challenge to be solved rather than a dynamic relationship to be nurtured. Brands focus on optimizing loyalty programs—figuring out how to get more people to sign up, entice them with perks, and keep them engaged without alienating them—without asking a more fundamental question: How does loyalty work?

Instead of treating loyalty as a standalone function, we should see it as the consumer-oriented counterpart to brand building—or, as behavioral science would describe it, person-brand congruence. The brands that succeed in cultivating absolute loyalty don't just offer rewards; they design experiences that embed themselves into customers' lives in meaningful, enduring ways.

For too long, brands have mistaken habits for loyalty, assuming that customers will

stay if the brands create enough structural or financial barriers to exit. But loyalty isn't about being locked in—it's about choosing to stay. The real challenge isn't just retaining customers; it's making them want to remain by choice, not constraint.

This is why loyalty cannot be reduced to a program. Instead, we must rethink it as a relationship system—rooted in how loyalty forms (the four bonds of loyalty) and why and why it persists (the four dimensions of loyalty).

The four bonds and four dimensions: A standard model for loyalty

Loyalty doesn't emerge from transactions alone. It's a profoundly human process, shaped by psychological bonds connecting customers to a brand and motivational dimensions determining why they stay engaged.

The four bonds of loyalty (how loyalty forms)

These psychological ties explain how loyalty develops between customers and brands:

- Emotional bonds—A sense of shared values and identity
- Social bonds—A connection to a like-minded community
- Structural bonds—Practical factors that make staying easier
- Financial bonds—Incentives that provide tangible value

The four dimensions of loyalty (why customers stay)

These core motivators shape customer commitment and deepen engagement:

- Principle—Does this brand align with my values?
- Potential—Does this brand help me grow and improve my life?
- Culture—Does this brand fit into my world?
- Community—Does this brand make me feel like I belong?

While these frameworks are distinct, they are also deeply interconnected. The four bonds create the foundation for loyalty, while the four dimensions determine whether that loyalty is sustainable and emotionally meaningful. Together they make up a system—a standard model—that describes relationships and prescribes how they are designed.

From transactional to transformational: How these models work together

Most brands focus too much on structural and financial bonds—reward programs, pricing strategies, and contracts—assuming that convenience and cost savings will keep customers loyal. But these factors alone don't inspire genuine commitment. A brand can offer the best discounts and perks while losing customers to competitors who forge deeper emotional and social connections.

This is where the four dimensions of loyalty come into play. A customer may initially stay because of a structural bond (e.g., a bank offering free ATM withdrawals). Still, true loyalty happens when the brand also aligns with its Principles (ethical finance), Potential (helping the customer

invest in their future), Culture (reflecting their identity), and Community (connecting them to others with shared financial goals).

When brands apply both frameworks, they elevate loyalty from a transactional exercise to a transformational experience.

While Ogilvy has already researched and explained the four bonds of loyalty, the four dimensions are new findings. In the pages that follow, we describe the research that led to their discovery, look at the results in detail, and delve into prescriptions for brand actions that emerge from them.

KEY INTERACTIONS BETWEEN THE MODELS

Four bonds of loyalty	Four dimensions of loyalty	Connection
Emotional (shared values)	Principle (this brand aligns with me)	Brands must live their values, not just market them.
Social (community and advocacy)	Community (I belong here)	People are loyal when a brand is part of their tribe.
Structural (makes my life easier)	Potential (this brand improves my life)	A frictionless experience reinforces the brand's role in the customer's journey.
Financial (discounts and perks)	Culture (this brand fits in my world)	Discounts get attention, but cultural fit keeps customers engaged.

FOUR BONDS OF LOYALTY

Emotional bonds

A sense of shared values and identity

Structural bonds

Practical factors that make staying easier



Financial bonds

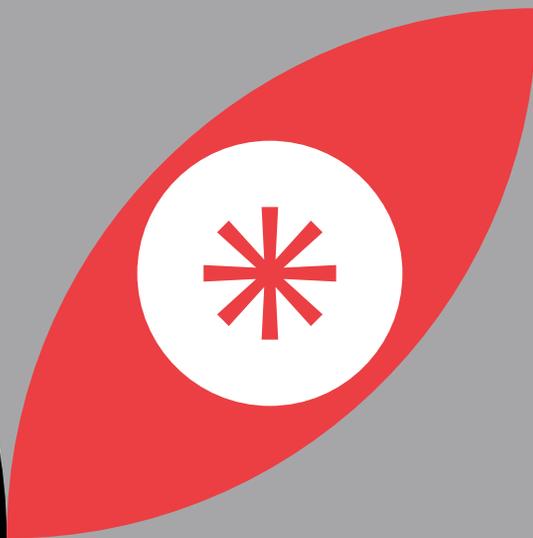
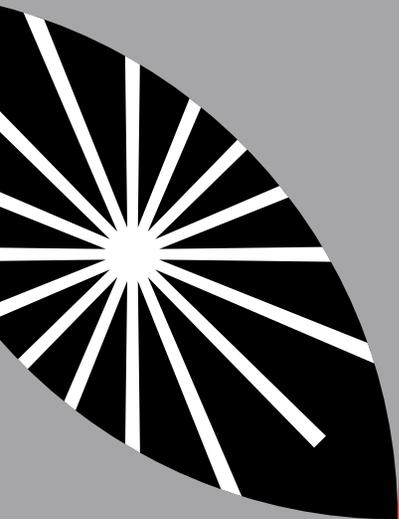
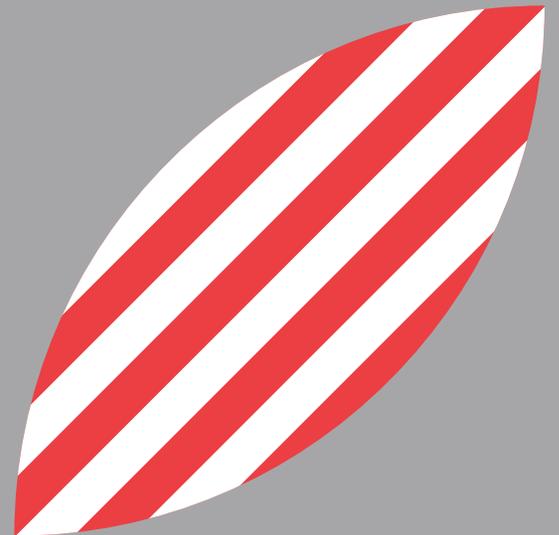
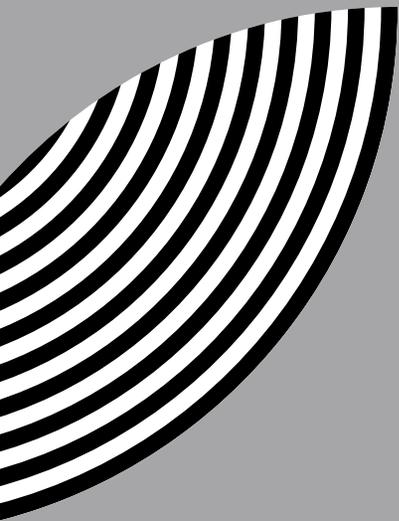
Incentives that provide tangible value

Social bonds

A connection to a like-minded community

THE FOUR DIMENSIONS
OF LOYALTY

From execution to emotion: How we uncovered the four dimensions of loyalty



In order to research consumer preference for the four dimensions of loyalty, we had to discover them in the first place, and for that we turned to the marketing literature on the subject. We uncovered that the product is, of course, central to consumer faithfulness; product or service satisfaction is a necessary precondition to consumers continuing their relationship with a brand.

Prior Ogilvy research⁰¹ conducted in October 2021 showed that just one bad experience would induce 44% of consumers to sever ties with a brand. High-quality products, that research found, drove loyalty for 65% of those surveyed, and rational factors outperform emotional ones in tying consumers to brands.

Why, then, should we focus on emotion? Demographics reveal one reason. The importance of rational factors declines steadily as one moves from older generations to younger ones, with emotional factors increasing commensurately, and 50% of all consumers report that brand values have become more important to them over the past few years.

Ogilvy's prior research further showed that loyalty is tied tightly to the value a brand provides, and that loyalty emerges from a brand's interactions with customers through communications, marketing, product, and program. Moreover, we learned that loyalty results from connection to a brand's culture, how that culture is expressed to the consumer, and how that culture interacts with society, especially with the culture at large. And we uncovered the importance of emotional connection, of personalization, and of reciprocity.

Yet consumers take personalization as a given. The converse is also true. Accenture reports that 33% of consumers will abandon a brand that fails to create a sense of personalization. Forrester's Customer Experience Index notes⁰² that brands which make customers feel appreciated will enjoy recommendations from 87% of consumers, higher spending from 80% of them, and repeat purchases from 76%.⁰³ Brands may still struggle with this and will, therefore, miss this fundamental transactional imperative. That is an execution problem, and it can be solved by better, more consistent use of martech tools widely employed already. It is more challenging to turn consumers' emotional expectations into strategies and creative. To do that, we have relied on broad expressions of values and have frequently thought in terms of brand action rather than the consumer ethos of today. However, building brand loyalty depends on appreciating the characteristics of commercial culture and the shared beliefs that animate it.

We decided to fill that gap by exploring the perceptions consumers have of loyalty in order to develop a framework of actionable information. We uncovered that consumers across demographics and geographies see loyalty in four dimensions which are broadly correlated to higher levels of repeat purchase.

01 "Loyalty: It's Not Just for Programs Anymore." Ogilvy Experience, 2021.

02 Curtis, Mark, et al., "Life Reimagined." Accenture, 2020.

03 "CX Index," Forrester, 2024.

Approach

To explore this concept globally, Ogilvy conducted an online survey among 3,532 adults across seven countries. These respondents were qualified for the survey based on having at least one favorite brand within one of five industry categories:

- **Financial services** (e.g., banking, credit cards, investing, etc.)
- **Technology** (e.g., smartphones, social media platforms, apps, etc.)
- **Travel and transportation** (e.g., airlines, cruises, buses, car rentals)
- **Retail** (e.g., department stores, convenience stores, fuel stations, online retail, etc.)
- **Accommodations and entertainment** (e.g., hotels, amusement parks, etc.)

Respondents were asked to keep a single favorite brand in mind when responding to the questionnaire.

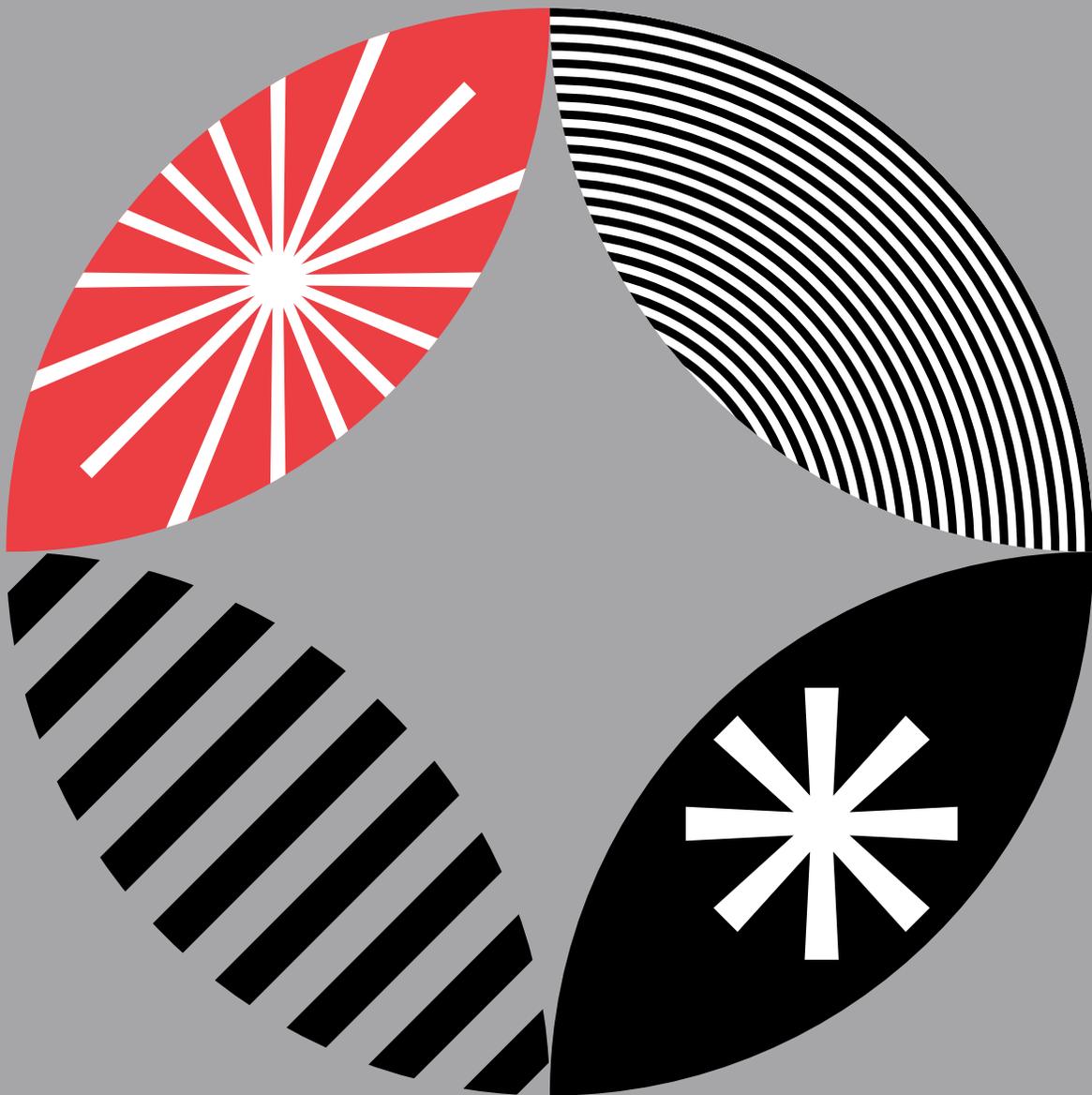
We asked respondents for demographic information, including gender, age, urbanicity, parental status, etc., to balance the sample with census data for each country as well as to explore differences in loyalty across these personal factors. (See chart on p. 18.) Further, we assessed respondents on the behavioral science factors of conscientiousness, openness to experience, and regulatory focus to investigate the association of key psychological drivers with dimensions of loyalty. See appendices for full details.

METHODOLOGY

Data for this study were collected via the CARAVAN survey, conducted by Big Village among a sample of 3,532 adults ages 18-64 in seven countries (505 adults in Brazil, 505 adults in China, 504 adults in Germany, 505 adults in India, 505 adults in Mexico, 504 adults in the UK, and 504 adults in the US) who have a favorite brand in at least one of five categories (financial services, technology, travel and transportation, retail, and accommodations and entertainment). This survey was live on May 24–30, 2024 in the US and May 28–June 3, 2024 in Brazil, China, Germany, India, Mexico, and the UK.

THE FOUR DIMENSIONS
OF LOYALTY

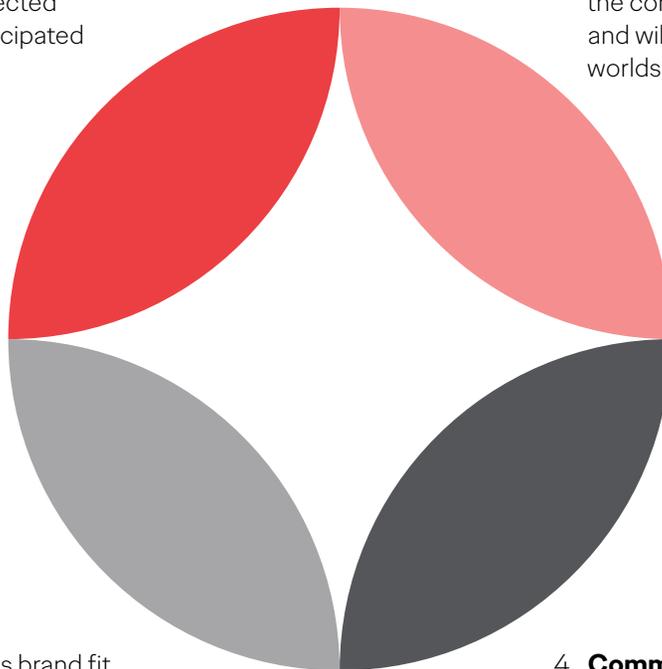
The four dimensions of loyalty



Prior loyalty research—our own and others’—is replete with information and consensus on how to optimize loyalty programs and the communications that surround them, but that translates imperfectly into a nuanced grasp of loyalty itself. Combining that learning with Ogilvy’s research and wisdom on brand impact, however, led us to surmise what a loyalty armature might look like. We recognized that it is not just a reciprocal relationship between brand and consumer, bringing benefits to both parties in equal measure. Looked at from a less transactional perspective, loyalty is an expression of individual and group psychology experienced in the context of culture, and it has four dimensions.

1. **Principle**—Does a brand align with the consumer’s values, ethics, expected behaviors, and anticipated outcomes?

2. **Potential**—What will come of the relationship between the consumer and the brand, and will it impact consumers’ worlds, helping them thrive?



3. **Culture**—Does this brand fit well with the culture, and what is its contribution to helping society evolve?

4. **Community**—Will this relationship help foster connection, provide new avenues for association, and give consumers an impetus to offer public allegiance?

THE FOUR DIMENSIONS OF LOYALTY

With their favorite brand in a particular category in mind, we asked respondents to what extent they agree or disagree with four statements for each dimension of loyalty and to tell us how often they purchase or do business with that brand. Throughout this report, agreement percentages are a net calculation of “Strongly Agree” and “Somewhat Agree” responses.

The consistency of the responses surprised us. Strong majorities of respondents agreed with at least one of the statements for each dimension of loyalty. Majorities agreed with all four statements in each loyalty

dimension overall and at a rate that was higher for more consistent purchasers.

More consistent—more loyal—purchasers value Principle, Potential, Culture, and Community. To appeal to them, brands must meet their expectations in each of these dimensions, with a special focus on Principle, which is the most widely agreed-with of them. Potential is next in importance, with Culture and Community essentially tied for third place.

Among those who purchase or choose their favorite brand 75% of the time or more...



Among those who purchase or choose their favorite brand less than 75% of the time...



Answers

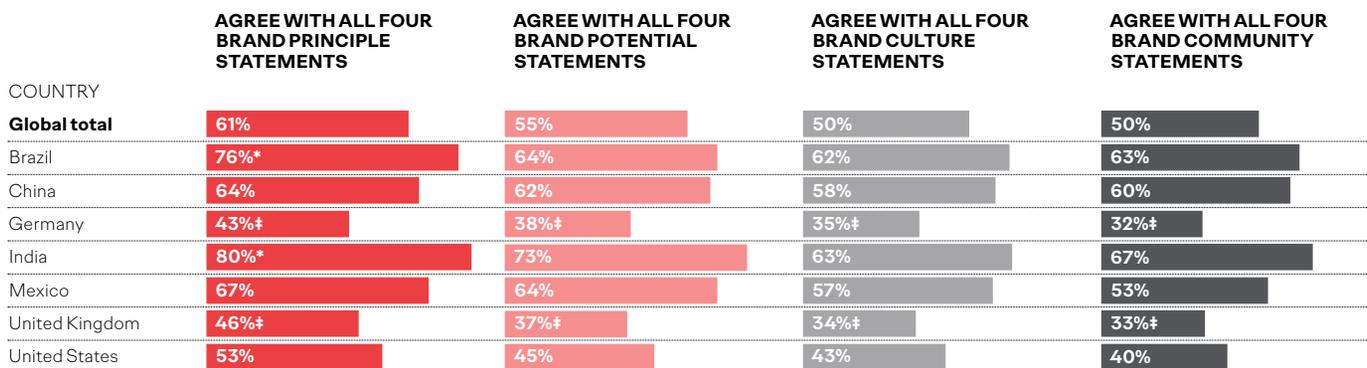
In assessing results, “Agree” combines Strongly Agree and Somewhat Agree results, and “Disagree” combines Strongly Disagree and Somewhat Disagree.



Statistically significant differences

Results have been tested for statistically significant differences at a 95% level of confidence. An asterisk (*) indicates a percentage that is statistically significantly higher than the comparison group or groups, and a double dagger (‡) indicates a percentage that is statistically significantly lower than the comparison group or groups.

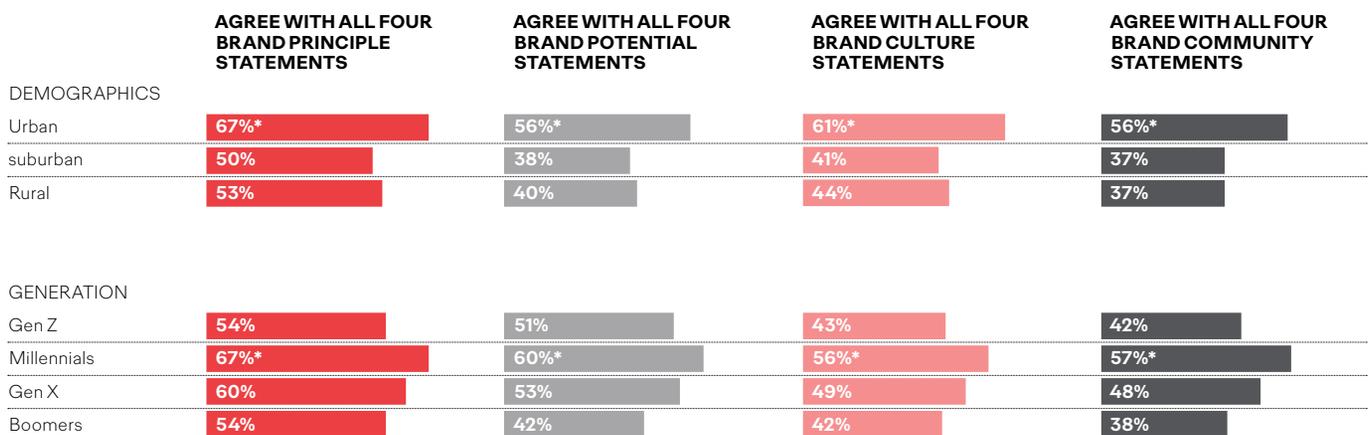
National nuances



Travelers know that societies vary dramatically, and what's true in the United States might not be in Germany—or even in the United Kingdom. (As the cliché goes, the US and the UK are two nations separated by a common language.) The same is true of how cultures view loyalty. In general, Germany and the UK have the lowest agreement across the four dimensions, never once having a majority agree with all the assessing statements. Brazil and India, by contrast, are consistently high, with the other three countries—China, Mexico, and

the US—falling somewhere in the middle. We saw the same pattern play out in purchase consistency (See appendix II, table 16.) All of this suggests that the four dimensions of loyalty may be less uniformly accepted in Germany and the UK. However, a deeper dive into the data shows additional nuance around individual statements in those countries and in specific industry categories. (Refer to the country/category deep dives for specific guidance.)

Demographic differences



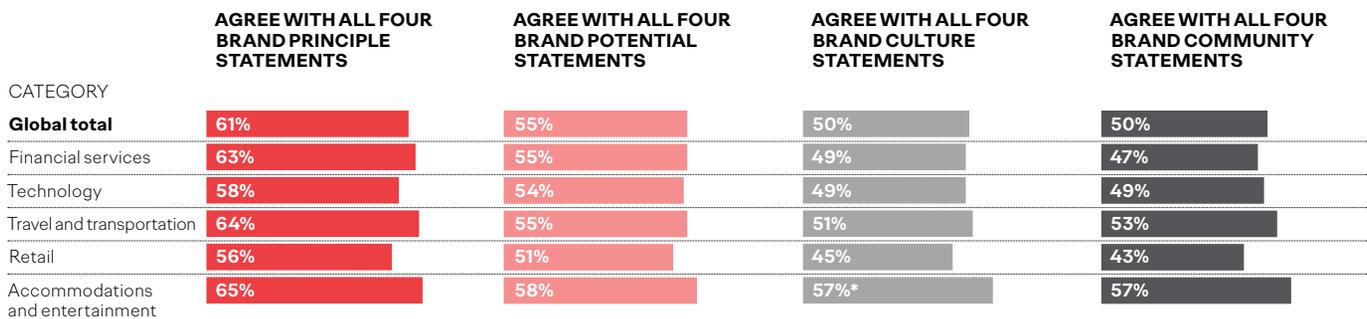
The starkest demographic divides often show up between men and women. Not so for the four dimensions of loyalty. Ogilvy’s research revealed no gender differences of note in any of our questions, suggesting that the psychology of loyalty is gender-neutral in the markets we studied.

Some interesting distinctions show up in urbanicity and age cohorts, however. Population density proves to be a viable predictor of alignment with the four dimensions of loyalty. Urbanites are more likely to have broad agreement with Principle, Potential, Culture, and Community—in that order, repeating a pattern seen throughout the data. (See chart above.) We expected suburbanites to be the next most accepting of this framing but found instead that rural consumers were just as interested as their suburban counterparts. This may reflect the greater proportion of older people in the suburbs, who, as noted below, have lower affinity for the four dimensions of loyalty.

When we compared respondents by generation, we found millennials to be the most attuned to the loyalty dimensions, belying the general assumption that Gen Z expects the most affinity from their brand relationships. That generation does value exclusive and early access, but not at a rate higher than millennials. (See chart above.) Nevertheless, even a majority (54%) of boomers, the least-engaged generation, agree with all four Principle statements. (See appendix IV.) This makes a clear case for the applicability of Principle, Potential, Culture, and Community to loyalty marketing. (See appendix IV; a close examination of these nuances can be found in the country/category deep dives found later in this report.)

The attitudes of parents tracked closely with those of the millennials, which makes sense given that they are in the peak years of parenting right now. (See appendix III.)

Contrasts by categories



Understanding the differences in how national and demographic cohorts interpret loyalty will help us address the specific drivers of consumer loyalty (see appendix IV), but as all marketers know, retail consumers behave distinctly from those seeking out financial services or technology. To tease out those particulars, we sorted our samples into five industry categories, asking respondents to answer the questions we posed to them with their favorite brand from that category in mind. This did more than just give us a perspective on the dimensions of loyalty across categories; it also helped make sure participants weren't all just thinking about one or two particularly famous brands.

The results fit the by-now-expected patterns of general agreement with the four dimensions of loyalty, and with Principle most strongly. Each category, however, had its own directional trends. In the case of the Culture dimension of loyalty, respondents in the accommodations and entertainment category agreed with all four dimensions of loyalty at relatively high rates. (See chart above.) Younger generations (millennial and Gen Z) may be more loyal to cultural leaders, as they are more likely to identify their favorite brands as such, compared to older generations (Gen X and baby boomers). These younger generations were also more likely to view exclusive access perks as adding value. (See appendix IV.)

Burrowing into behavioral science

Given that this research looked at consumer attitudes, it made sense to dive into behavioral science findings from our respondents as well. We looked at them across three widely accepted aspects of the discipline. (See appendix IV for full details.)

Openness to experience

People who score high on this trait are more likely to seek out variety and be comfortable with the unfamiliar. Those with high openness to experience were significantly more likely to agree with the four dimensions of loyalty. Principle was most important to this group—66% agreed with all four statements in the dimension. Sixty percent agreed with all four Potential statements. Culture and Community are less motivating, but they still attracted majorities for those with high openness to experience.

Regulatory focus

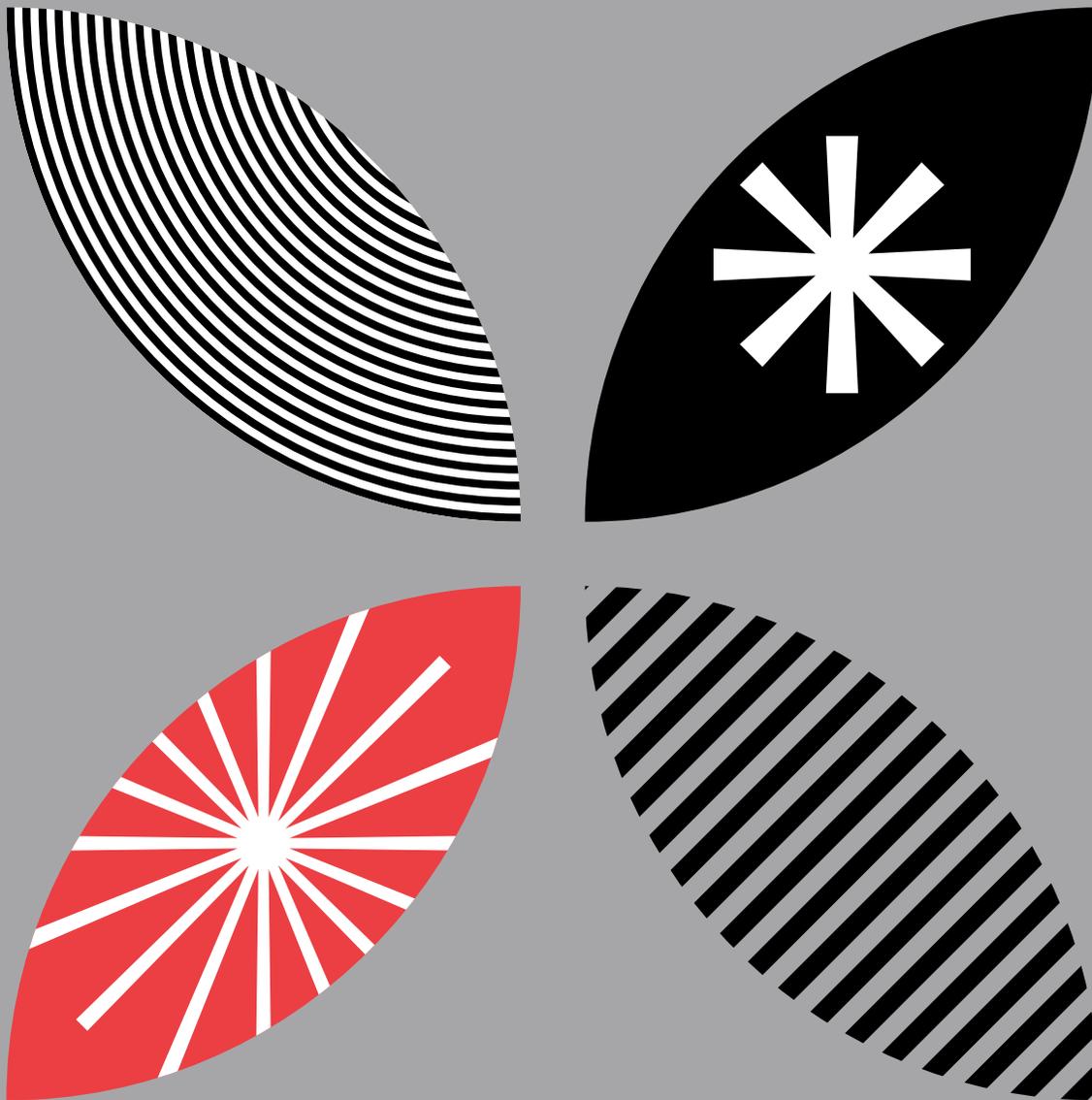
This measures the degree to which people prioritize aspirations and positive outcomes (promotion focus) or safety and negative outcomes (prevention focus). We grouped people according to those two categories and added a neutral one for those in between. Those with a promotion focus gravitated toward Principle (66%), Potential (60%), and Culture (55%). Those with a promotion or neutral focus agreed with all four Community statements (54% and 52%, respectively).

Conscientiousness

Those who tend to think ahead tend to score high on this trait, while those who dislike commitments and are more willing to act on whims score lower. High conscientiousness is a driver of brand loyalty across all four aspects. Principle is especially key, with nearly two-thirds of respondents (64%) of this type agreeing with all Principle statements. Majorities agreed with all statements on Potential (57%), Community (52%), and Culture (53%) when thinking of their favorite brand.

THE FOUR DIMENSIONS
OF LOYALTY

Translating the four dimensions of loyalty into brand building



It can cost hundreds or even thousands of dollars to attract a new customer to a brand. For all the benefits new technology has brought to marketing, it has also complicated the process of building brand awareness and driving purchase. Media channels are more fragmented than ever, consumption patterns vary sharply by generation, and there are few signs that the ecosystem will simplify anytime soon. Even as the AI revolution has made it faster and cheaper to create content, it has also made it more difficult to break through because it floods the zone with more and more media (AKA “AI slop”). As a result, brands must work harder to make an impact, especially on new customers. Loyalty is, therefore, more important than ever.

Investing in retaining a customer will be easier and less expensive than finding a new one, even if you have to jump through hoops to do it. Proliferating loyalty programs point to how seriously brands take this, but that also reveals a paucity of imagination. Look, people like free stuff. They like accumulating rewards. They like getting exclusive offers and unique opportunities. We measured the impact of those things and found that they’re germane, even in the context of the four dimensions of loyalty. But the fruits of loyalty programs are not all that consumers like, nor are they the most effective way to build loyalty. Here’s what is: understanding the things customers are looking for from your brand—things that are deeper than the obvious factors such as a good product or service, ace customer care, and a tidy loyalty program. As you’ve seen from our research, customers who are prone to brand loyalty are motivated by four factors: Principle, Potential, Culture, and Community. Those factors persist across geographies, demographics, and industries. Our research doesn’t just reveal the salience of the four dimensions of loyalty; it shows brands how to foster them in customers.

LOYALTY IN THE AGE OF THE EMOTIONAL CONSUMER

Ogilvy One looks at loyalty from multiple angles, which is why the agency hasn’t just conducted research with consumers; it also regularly takes the pulse of top loyalty and CRM experts. It’s most recent research, “Loyalty in the Age of the Emotional Consumer,” surveyed subject matter experts in the EMEA region to uncover what brands need to do to design meaningful, long-lasting relationships with their customers.

Yes, design. Ogilvy One has shown that great brand-consumer relationships don’t happen by chance. They are designed, and for today’s customers they must be designed with meaning in mind. As the authors write, “Loyalty is an emotion, not a transaction. No statement better and more succinctly defines the essence of modern loyalty. Customers today crave more than just rewards; they seek belonging, shared values, personalized experiences, and relationships with brands that truly understand and anticipate their needs.”

The agency found that achieving that requires brands to embrace these four tenets:

- Data without understanding is noise
- Loyalty requires courage and commitment
- Adapting through creativity and innovation
- The power of the collective

For more on how to bring those four ideas to life—and how your brand can design loyalty and CRM programs that cater to the emotional needs of your customers—read “Loyalty in the Age of the Emotional Consumer.”

Behave with principle



Of the four dimensions of loyalty, Principle is the most important, and that should be no surprise. Humanity is in the midst of a global crisis of values, and it is one that will only accelerate as climate change leads to large-scale migrations, which civilizations are just beginning to confront. The West is learning how to react to migrants with different cultural backgrounds at the same time as the whole world is reeling from the ongoing impacts of the COVID-19 pandemic—and bracing for the next. That has intensified trends born from digital dislocation. The result is ebbing trust in our neighbors and the institutions that represent the collective society.

One need only look at the post-pandemic political landscape to see confirmation of this. Nationalist, even nativist, right wing movements have gained a foothold in the United States, Latin America, Asia, and Europe, joining traditionally

insular cultures elsewhere in the world, often casting migrants as global boogymen to highlight how “real” citizens are imperiled and institutions are enfeebled. Corrosive, highly partisan politics are eroding societal bonds even as they strengthen tribal connections, leading to the repudiation or, worse, demonization of those with whom we disagree, further weakening national cohesion. Levels of public confidence in government are a good indicator of this. In the United States, trust in the federal government declined from 35% to 23% between 2022 and 2024. That’s a drop of 12% in two years. Sixty-three percent of Americans explicitly distrusted the government as of 2023, up from 46% a year earlier.⁰⁴ Trust has waned since the 1960s, but the rate of change happening now

⁰⁴ “The State of Public Trust in Government 2024,” Partnership for Public Service, 2024.

is shocking. This suspicion of government has roiled Europe as well, leading to the repudiation of institutionalist governments such as those in Germany and France and the rise of parties that promise to burn the place down. The iron grip of Narendra Modi's BJP in India have led to it being labeled an electoral autocracy by Sweden's V-Dem Institute⁰⁵—a finding corroborated by other NGOs—and the trust citizens have in it has decayed accordingly.⁰⁶ Faith in government has retreated steadily since 2021 in China, once seen as a place with unshakable confidence in national institutions.⁰⁷

Migration isn't the only factor at play here, even if it is the one that often gets the most press. Technology plays an enormous role, having made possible the rise of globalization, which shifted working class jobs out of industrialized economies and eviscerated the economic prospects of those without a college degree. In rapidly growing nations such as China, the economic acceleration the country depends on for social stability has started to falter, leading to fading conviction in the government's ability to deliver increased wealth. Neither can one overlook the impact of COVID-19-era policies on the collapse of belief in competent governance. Perceptions of mismanagement in China and the United States have proven especially corrosive. Major research backs this

05 "Democracy Report 2023," V-Dem Institute, 2023.

06 Karun, Nishta, "How to Revive Trust in Indian Democracy? Start with Digital Engagement," Chicago Policy Review, January 17, 2024.

07 "Level of Trust in Government in China from 2016 to 2023," Statista, 2025.

up: the Edelman Trust Barometer notes that governments are seen as dramatically less ethical and less competent than businesses.⁰⁸

Into this rich stew, stir political realignments and odd pairings such as libertarians and natalists or right-wing populists and progressives making common cause. It's a dish few would choose to eat, but here we are, facing a steaming bowl of it, feeling like we have less control than ever over our lives and the direction our societies are going. In response, people have tightened their circles around them, choosing to live out the serenity prayer for real.

If we feel powerless to impact our society, disconnected from the ability to effect change, buffeted by cultural upheaval, and cosseted in self-reinforcing tribal bands, is it any wonder that we turn to the one place where we can take direct action? That is, of course, our consumer choices, and, since spending money with a company feels a bit like direct democracy, business remains the most trusted institution worldwide...at least as long as it reflects our values.⁰⁹

It is a short hop from trust to loyalty; one must have the former to secure the latter, and the latter is a logical outgrowth of the former, so long as the right conditions are in place to foster it. Fortunately, consumers told us exactly what those conditions are.

08 "2024 Edelman Trust Barometer," Edelman Trust Institute, 2024.

09 "What We Know about Brand Trust," WARC Best Practice, August 2024.

PRINCIPLE
FACTOR 1

**Consumers want brands to behave
in ways they respect or prefer.**

This is the single most important factor for them. In fact, it is the most widely agreed-upon component of Principle in every dimension we measured, at 85% agreement (See appendix II, tables 10-13.) That leads to an inescapable conclusion: brands must live out values shared by their customers and make that clear in their communications and marketing. This will create challenges in more polarized environments and with more divisive issues, but brands must master the temptation to hide from controversy and instead find an artful way through. Don't follow the example of Bud Light, in other words. (More on that later.) In an uncertain world, where people feel alienated from power, they're looking to brands to be proxies for them, amplifying their voices. Do so in a way that doesn't take sides, though. Consumers have had enough of that.

Sometimes it is enough to make clear that you are listening. That's what Starbucks did in its reinvestment in the customer experience. The brand reduced menu complexity, lowered wait times, and went back to the personal touch of giving baristas time to write customers' names on their cups. Or you could go big, as Cadbury did with "Shah Rukh Khan My Ad," an effort that promoted local communities and businesses with AI-empowered personalization of ads from a Bollywood superstar.

PRINCIPLE
FACTOR 2

**Consumers want brands to make
an impact that matters to them.**

A corollary to the point above, this consumer imperative demands that the behavior brands exhibit be more than just a performance. Consumers are not interested in tokenism and instead desire that their values show up in meaningful ways. McDonald's Sweden, with its "Big Enough to Make a Difference" program, did exactly that over the course of 20 campaigns that built biodiversity, fostered kids' reading, raised awareness of dyslexia, expanded car-charging networks, reduced litter, gave jobs to 100,000 young people, and more. In so doing, it turned a declining business around, increasing market share, brand perception, sales growth, and cash flow. By acting meaningfully on widely shared values, McDonald's avoided controversy by making everyone feel as if their ethics were amplified by a company that is big enough to make a difference.

PRINCIPLE
FACTOR 3

Consumers want brands to promote or express what they value.

At least most of them do. Many consumers look for brands to do more than act; they want them to advocate for their values. It's a reasonable feeling given that they no longer trust institutions to do that for them. This is perilous, as brands have seen in backlash from culture war issues. The safest way to navigate those shoals is by marching in lockstep with the culture, which is what most consumers seem to want. We asked them if their favorite brand leads culture or reflects it, and with few exceptions, favorite brands were described as cultural reflectors, often by dramatic margins. (See appendix II, table 14, and appendix III, table 24.) Keep in mind, however, that when we sliced our data by demographics, differences showed up. Younger consumers—millennials and Gen Z—are looking for brands to lead the culture, and that complicates things for brands seeking out those target audiences. (See appendix IV.) They're the ones hoping that companies bring society and its structures around to their way of thinking, and that may spoil the plans of a brand that wants to play it safe. A strong sense of what culture-leading issues are likely to rebound will help brands stay ahead of culture without getting creamed. (Read more on this below.)

Dove's unbeatable "Campaign for Real Beauty" is an ideal example of a brand promoting and expressing what consumers value, and, in so doing, the brand has given voice to women eager to push back against corrosive beauty culture.

PRINCIPLE
FACTOR 4

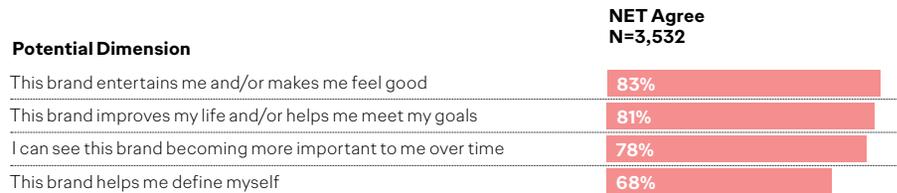
Consumers want brands to take actions that improve their world or the world at large.

Enthusiasm for this point drops off relative to the others (see chart p. 23.), but it remains important in the aggregate. This likely reflects consumers' understanding of the limitations brands have. People know that the climate crisis cannot be solved by companies alone, nor do they think the world will become safer and more equal because of a brand's actions. Better, consumers seem to be saying, to act in a way that creates impact rather than shooting for the impossible. Still, strong majorities endorse the idea of improving the world, and while it shouldn't be the core of your marketing, neither should you ignore it, especially when it is a direct outgrowth of the values a brand espouses. Dove did exactly this with its support of the CROWN act, designed to end race-based hair discrimination.

GENERATIONAL DIFFERENCES

Gen Z has a reputation for demanding the most from the companies they patronize, but our research found that millennials are most likely to want brands to provide the four dimensions of loyalty in return for their fealty. (See appendix IV.)

Improve lives



We face not just a crisis of values but one of expertise, too. The institutions we rely on have come under attack and their credibility has been questioned. While the pandemic hangover seems the proximate cause, the roots of this extend back to the beginnings of digital disintermediation. Technology exhilarated us with the ability to connect directly with one another, to share information without gatekeepers, and to lower the considerable barriers to reaching an audience. We reveled in the freedom, and that made us better and helped build a global culture. But it also sidelined expertise and eroded the foundations of shared reality. Marginalized voices and suppressed ideas emerged into the culture, but so did rampant misinformation. Any sense of a commonly agreed-upon set of facts—universal truths—collapsed into the primacy of perspective and victory by the loudest barker in the marketplace of ideas. Then the marketplace itself fragmented, with tribes

choosing to shop for truths inside durable information bubbles and nowhere else.

Skeptical of vaccines? There's a universe of "truth" there to reinforce your biases. Believe the worst about your political opponents? You'll find ample evidence to support your anxieties. Fear immigration? A wealth of information will show how it is destroying society.

Into this proudly iconoclastic party waltzes late-stage capitalism, bedecked in its failure to provide an appealing future to huge swaths of the population, leaving brands to keep the celebration going. On the one hand, populism, privatization, and skepticism are forcing the offloading not so much of the functions of government, but rather of the trust it engenders, to business. On the other, regulatory capture, the intimidating scale of our largest societal problems, and our inability to

solve them have led to cynicism and a feeling of impending doom. It is no wonder, then, that consumers give their loyalty to brands that offer promising Potential—potential to improve how they feel, help them meet their goals and define themselves, and, as a result, become more important to them over time.

For all of our bellyaching in fully developed economies, the consequences of eroding expertise are felt more keenly in those that are still emerging, putting more pressure on brands to deliver Potential to consumers there. Similarly, millennials, as members of the generation currently experiencing the breakdown of expertise most keenly due to where they are in life, respond more strongly than all other age cohorts to this dimension of loyalty. Gen X, too, is seeking Potential from their brands, since they belong to another generation that came up with the expectation of an expertise-driven, effective world, only to have that particular rug yanked out. Gen Z is native to this fragmented landscape and has learned to find other things, notably things unconnected with consumption, to actualize their lives. And as for boomers? Well, they still have it pretty darn good. (See appendix IV.)

Unsurprisingly, this loyalty dimension is felt intensely by those considering accommodations and entertainment brands. (See appendix III, table 2.1.) Those are, after all, the brands directly tasked with delivering the modern-day equivalent of bread and circuses.

Given that we know how crucial Potential is and why that may be so, we can turn to how your brand can deliver it to your customers—and to the consumers you hope to attract.

POTENTIAL
FACTOR 1

Consumers want brands that entertain them and/or make them feel good.

This is the heart of Potential. It is the highest-rated aspect across most categories, with the notable exception of those thinking about financial services brands, where the idea of entertainment or good feelings conflicts with what the consumer seeks. Interestingly, it was most important for China, Germany, and Mexico, while sliding to second for those in Brazil, the US, and the UK (See country-category loyalty guides.) That may reflect a bias toward entertainment in those countries, but it is more likely that those in the latter group are grappling with peaks in institutional distrust, leading them to look to brands to fill the expertise gap.

This tells us that brands play a crucial role in driving positive emotional experiences for their customers and that attending to those needs will earn their loyalty. It also suggests that as trust craters, consumers will form emotional bonds that will help them compensate for the societal deterioration. Furniture retailer Home Centre did this magnificently with a campaign called “The Homecoming” that promoted adoption in Saudi Arabia, building powerful emotional bonds by taking on a fraught issue in the nation and sticking with it in the face of opposition. Evocative activations turned a crisis of numbers into one with real people attached, and Home Centre’s work went viral. Due to the brand’s persistence, attitudes toward adoption began to change while purchase intent, footfall, and volume increased dramatically.¹⁰

¹⁰ “Home Centre: The Homecoming Initiative,” WARC, 2024.

Even in times of economic dislocation, brands should not let up on communications that carry emotional weight, including value messaging. Even better would be to combine emotion and value, emphasizing the larger benefit of association with the brand. Value and affordability have become essential messages for QSR brands around the globe. Starbucks, long resistant to value communications, has added bundled offerings, but the brand's potent mobile app has been the site of much of their value push, reinforcing the notion that the connection they have with consumers is where the real value lies. They've even added a new reason to believe in that connection with the addition of mobile order and pay.¹¹

Since exclusivity is another key to building this emotional connection, we asked respondents about how much they valued exclusive or early access to experiences or products. Customers in all nations appreciated such access, with the most-favorable reactions coming from China, India, and Mexico. When it came to industry, travel and transportation and accommodations and entertainment showed the greatest agreement that exclusive-access offerings add value. (See appendix II, table 25.) Those are experiential categories, and this alignment makes sense. Nevertheless, majorities in all countries and industries rated exclusivity highly, showing that brands would be wise to foster the feeling of belonging among their customers. (See appendix II, table 15, and appendix III, table 25.) This creates an interesting intersection with conventional loyalty tactics, since exclusive access and the resulting emotional response are often generated via reward programs,

¹¹ Maze, Jonathan, "Starbucks Makes a Surprise Jump into the Value War," *Restaurant Business*, June 11, 2024.

but we believe our work makes clear that brands must do more. They must show their customers the potential their relationship has to give them good feelings, as has been done well by Visa with their long-running emphasis on the consumer benefits they offer.

POTENTIAL
FACTOR 2

**Consumers want brands that
improve their lives and/or
help them meet their goals.**

This is the rational complement to the emotional aspects discussed above, and it is an expected and direct outcome of the denigration of expertise. Accordingly, it was rated highly by many respondents. In fact, it was the most important for Brazil, the US, and the UK—three countries facing crises of institutional efficacy and trust—and for millennials and boomers, who need brands to step in with practical solutions in high-intensity parts of life: parenting and retirement. (See country/category loyalty guides and appendix IV.) This also explains the affinity of suburbanites for this brand expectation. Financial services brands must shine here, since participants felt this was the most important part of the Promotion dimension for them, but it will be important for other sectors as well. (See country/category loyalty guides.) Customers of accommodations and entertainment and of technology companies want to be loyal to those who make life easier.

Brands can satisfy consumers on this point by delivering products and services that simplify and improve life, and customers have given

companies license to expand beyond the narrow scope of their own offerings. Nike's Training Club is a close-in example, providing, as it does, a broad spectrum of fitness programs, guidance, and content. Gerber goes a little further afield by offering 24/7 on-demand expert help for parents, and IKEA shows customers how to extend the lifecycle of their products. Apple has in-store workshops that teach consumers everything from photography to coding, while REI uses the same concept to get people ready to tackle the outdoors.

An especially potent way to do this is to help customers navigate an increasingly complex digital world, and so far, few brands have made great strides here. Companies like LastPass, 1Password, and Keeper help people manage their credentials, and technology companies like Apple, Samsung, and Roku have made names for themselves on the back of user-friendliness. Nevertheless, technology grows more intricate and less explicable every day, especially with the advent of AI, and brands that act as digital navigators will earn devotion from consumers. Our research showed that this preference is especially strong for customers of financial services and technology brands.

POTENTIAL
FACTOR 3

Consumers see brands becoming more important to them over time.

Loyal customers don't expect a static relationship. Many of them, especially in India (90% agreement), Mexico (86% agreement), Brazil (85% agreement), and China (84% agreement), anticipate that the brands they are loyal to will increase in importance to them. That places an obligation on brands to reward their loyalty with expressions of emotional and rational value and to recognize the consistency these customers have shown. However, there is a tension in the data. When we asked respondents if they'd like brands to reward them for consistent use or how long they've been a customer, participants from China were quite cool to the idea, which fits with their market dynamics. (See appendix II, table 15.) Consumers in China—and in Asia Pacific in general—have the least brand loyalty among those major regions,¹² which is due to the ease of price comparison and a reliance on competitive pricing to capture market share.¹³

¹² "Asia-Pacific Consumers Show Most Brand Disloyalty," WARC, 2019.

¹³ Chen, Jenny, "Spotlight: Growth Challenges for Chinese Brands Going Global," WARC, February 2024.

Reflect culture



It wasn't long ago—just two decades—that Thomas Friedman announced, “The world is flat.” Digital innovation, Friedman argued, had produced a global market where companies, nations, and people competed to thrive. In this world, supply chains were borderless, as were workforces, processes, and talent pools.

That seems quaint now. While the pandemic accelerated things, the global economy has been moving toward higher barriers for a few years now. The first Trump administration swept into office in large part on a visceral cultural reaction to globalization. So too did the second. Sandwiched in between, Biden's White House was similarly protectionist—just with industrial policy rather than tariffs. China, long a champion of its domestic industries, has used industrial policy to strengthen them, but in the wake of

increased tensions with the West, it started to impose export controls on critical raw materials such as rare earth elements. India has increased its tariffs in a bid to bolster manufacturing self-sufficiency, and Russia, cut off from markets by sanctions, is working hard to build domestic alternatives to international imports while still looking to bring in cash via energy exports.

Anti-immigrant feelings and nationalist politics are the societal counterpoints to inward-trending geopolitics, and both are ascendent around the globe. The pace of globalization overtook society's ability to adapt to change, thereby leading the culture rather than reflecting it. That led to a blowback that is reshaping the world for the individuals, businesses, and institutions Friedman wrote about in 2005. The world is no longer flat. It is becoming mountainous, difficult

to traverse, and fortified, and to bestride it, brands must develop a nuanced understanding of the narrow concerns of a single country while still promoting the international standards and brand assets that captivate consumers everywhere—including the reputation of their country of origin.¹⁴ They must, in other words, learn to reside comfortably in the tension between local and global culture.

CULTURE
FACTOR 1

**Consumers want brands
that chart their own path.**

This is the most important cultural factor to consumers, according to our research, which echoes the imperative to choose brands that have distinctive personalities, offerings, and assets. (See chart p. 27.) Those are the reasons to choose a brand over a no-name imitator, and increasingly that looks like a “glocal” approach. Pure adherence to international messaging preserves an outdated idea of Western cultural dominance and gives off the impression of homogenization these days, whereas attention to local and subcultural factors makes a brand feel like an authentic original. The tale of HSBC shows this evolution in action. Once known as “the world’s local bank,” the company reacted to a flatter world by attending to global strategic priorities and changing service levels in markets it could not fully serve. Its advertising shifted from local signifiers to universal emotional appeals, and over the six years of this effort, it saw increased competition from local banks that had distinctive assets. In response, the brand developed and shared a clearly defined point of view, one that firmly positioned HSBC as a local

¹⁴ In fact, Edelman’s 2024 Trust Barometer (cited above) found that trust in companies headquartered in countries that are global powers has declined steadily over the past ten years.

player—but one that epitomized how globally connected people are today. It even pushed back on less savory aspects of local culture, such as anti-immigrant bigotry, and addressed how to deal with borders in the post-Brexit economy.¹⁵ In charting its own path, HSBC regained the trust of consumers and showed itself to be a cultural emissary for their own feelings and aspirations.

CULTURE
FACTOR 2

**Consumers want brands
that get them.**

It is not enough to have a clear point of view in harmony with culture. Consumers also expect brands to understand them intimately. Another factor universally liked by respondents, this statement was the most important aspect of the culture dimension in the UK and for accommodations and entertainment, where an intimate customer relationship is central to brand success. (This factor also scored high for travel and transportation and for financial services—industries where the personal touch is crucial. See country-category loyalty guides.)

The marketing tech stack makes it possible to cater to a customer’s individual needs and preferences, and for many brands, what may seem like a cakewalk is still a significant technical and informational challenge. It’s important to solve this, and there’s great opportunity in the smart use of data, especially first- and zero-party data. However, there are limits to the appeal of this. Our research showed that much-lower percentages of survey participants were interested in personalization than in other brand value adds. Nevertheless, other findings noted earlier show that consumers are willing

¹⁵ “HSBC UK: The Value of a Point of View,” WARC, 2024.

to abandon brands that fail to personalize. This disconnect suggests that consumers may view personalization as a given: a problem if absent but not something worth remarking on. Maybe that is because really getting someone is more than just regurgitating what you know about them. Sure, they'll feel seen, but they may also feel manipulated. More interesting is demonstrating that you are a member of their tribe. IKEA excels at this, having pulled together nuanced, almost niche, campaigns that show consumers just how in tune the brand is with their lives. From promoting lesser-known holidays to highlighting a national obsession with sleep to recognizing the tribal influences on aspiration, the brand's communications march in step with the local "value system, vernacular, idioms, humor, customs, beliefs, and philosophies."¹⁶

CULTURE
FACTOR 3

Consumers want brands that are part of culture.

It's easier said than done, especially in times of political polarization. What's a brand to do when being part of culture for one set of its customers is anathema to the other? Start by understanding that staking out a position for the sake of having one is a recipe for disaster. Bud Light's years of

apparent allyship went up in smoke in the wake of their shambolic reaction to the clapback to their Dylan Mulvaney partnership. The because the brand was revealed to be a fair-weather friend to a community they had courted. With their customer base, they were not a brand that could be broadly and steadfastly inclusive of the LGBTQ+ community without eroding their market share, which is exactly what happened.¹⁷ If they were serious about the position they took, they should have weathered the backlash, but they were not prepared to do that, which cost them on both ends of the cultural divide.

A better approach is to attend to your values in a divided society, seeking out the cultural factors that unite us. The respondents in our research agreed with this. In almost all categories we tested, they would prefer that brands reflect culture, not lead it. Bud Light was ahead of culture, and as a mass market brand, that presented them with a challenge they were not up to meeting. In contrast, the US fashion retailer Revolve did a masterful job of reflecting culture when it entered the Middle East North Africa region, discovering audience categories unique to the region and reaching them with highly localized, social-first communications that honored their rich cultural heritage.¹⁸

¹⁶ "How Global Brands Resonate Across Cultures," WARC, 2017.

¹⁷ Collins, Marcus, "Walk This Way," WARC, 2023.

¹⁸ Wickerson, Brittany, "Revolve: Increasing Sales through Localisation," WARC, 2024.

Build community



People must turn somewhere in a spiky, skeptical, mistrustful world, and often they look to people like them for information they can believe in, with peers ranking equal with scientists in Edelman’s Trust Barometer.¹⁹ This is no cause for rejoicing, though, since staggering amounts of distrust in science have propelled vaccine denialism (and, as night follows day, rates of infectious disease) and disbelief in global warming (and thus climate catastrophe). Consumers hungry to “do their own research” want to trust their communities instead of authorities or scientists, but weaponized misinformation, the hunt for easy scapegoats for complex problems, and self-curated filter bubbles have induced the population to elevate charlatans

¹⁹ Edelman, *ibid.*

and opportunists to positions of power around the globe. To unscrupulous leaders, serving the narrative is more important than telling the truth, since the narrative reinforces tribal instincts, centralizes power, enforces division (and therefore weakens opposition), and maximizes the benefit they can derive from governing.

That’s the dark side of community power, but it has also promoted freedom, activated young people to fight for their beliefs, and brought people together around the globe. Even the shocks of pandemic-era lockdowns and electoral defeat strengthened community bonds, inducing smaller groups to nurture their members. It’s led to a review-driven online consumer experience, to new methods of community engagement, and to the democratization of influence.

Authentic voices have new opportunities to rise to prominence, creativity can flourish, and innovations have lower barriers to entry.

Consumers, our research shows, value community orientation in the brands they are loyal to, and while the impact is on par with that of culture, community orientation was shown to be more important than culture in China, Brazil, and India. (See appendix II, table 9.) Across all regions, community was tied, roughly, with culture in other regions, across the five industries we surveyed. As with all the other dimensions, it was significantly more important to frequent purchasers, and creating a larger pool of those customers requires brands to build better communities.

It may not be long, though, before this support ebbs, and for that we can blame AI. Even though AI influencers like Miquela have gained international traction, AI has eroded authenticity, made consumers question peer information, and degraded the content landscape with AI slop—garbage material that can drown out genuine voices.

COMMUNITY
FACTOR 1

Consumers want brands that their friends and family are also connected to.

A society where peers are trusted above all will gravitate to brands used by those trusted sources, and that may help explain why business has remained a trusted institution even as other pillars of society crumble. Word of mouth is an age-old method for building awareness, affinity, and loyalty, and the growth of review culture has brought scale to this. While they haven't caught on elsewhere yet, social shopping behaviors are common in East Asia. Micro-influencers, on the other hand, are a global phenomenon. And then there are simple presentations of the enduring affinity we have for family and family rituals. McCain has spent a decade promoting this by pointing out how integral their chips are to families and, in so doing, turned their business around.²⁰ In our research, family proved especially important for financial services, tech, and retail.

²⁰ "McCain: When the Chips Are Down, Margins Matter," WARC, 2024.

COMMUNITY
FACTOR 2

**Consumers want brands that
give them more than just the
product or service they buy.**

Our research showed that consumers want their brands to provide additional value, be that access, help with digital navigation, recognition, or personalization. (See appendix II, table 15, and appendix III, table 25.) This is the principle that has powered loyalty programs over the decades, and while we object to loyalty being boiled down to just the mechanics of a well-run program, the success of these efforts is clear to all. Unsurprisingly, this is the attribute most travel and tourism and accommodations and entertainment consumers were drawn to. American Express, for example, has built a juggernaut of loyal customers willing to pay handsomely for a premium card because of all the additional value cardmembers enjoy—a world-beater of a program that began with their travel-related services. Added value also stands behind the growth in experiential marketing, such as what Wimbledon has excelled at over the past few years, with global physical and digital activations that bring the essence of the tournament to fans all over the world. You can find the tournament on a re-creation of Henman Hill—only now in New York—or on your computer screen in Roblox and Fortnite, or in your ears through Spotify.²¹

²¹ Meyers, Alyssa, "How Wimbledon Is Giving Fans Around the World a Taste of London-Style Tennis," *Marketing Review*, June 27, 2024.

COMMUNITY
FACTOR 3

**Consumers want brands
that help them connect.**

There are innumerable examples of anemic brand community building that fizzle out for lack of an animating idea, and then there's LEGO, which has built a world of LEGO fan engagement that spreads the fun far beyond the brick. The LEGOLAND amusement parks might be best known, but the brand also sponsors adult fan communities through its ambassador network. It keeps enthusiasts supplied with everything from missing pieces to vintage sets through the fan-driven BrickLink site, and it supports a global innovation community through LEGO Ideas. Here's one thing linking all these efforts: the palpable excitement from the company. It doesn't feel like marketing, but it does feel like an extension of pure love for LEGO. Or consider the various Hallmark media properties, which turned a perfunctory social presence into the Hallmarkies—a tight-knit online community that dissects every plot, star, and release from one of the most-watched networks in the world.

Not all efforts at connection require decades of investment in community building and network effects. Something as humble as packaging can also help brands connect, as Coca-Cola showed with its iconic "Share a Coke" campaign. For a smaller example, look to SPC Ardomona, which told consumers exactly where their food had come from—right on the tin.²²

²² "SPC #MyFamilyCan Case Study," Causemarketing.com Museum.

Conclusion

For too long, brands have relied on transactional mechanisms—points, perks, and discounts—mistaking them for genuine loyalty. But true loyalty isn't about habit or entrapment; it's about creating relationships so compelling that customers actively choose to stay. While the four bonds of loyalty—emotional, social, structural, and financial—have long provided a foundation for how loyalty forms, our research reveals that lasting brand commitment is driven by additional considerations: the four dimensions of loyalty.

- Principle—Does this brand align with what I believe?
- Potential—Does this brand help me grow?
- Culture—Does this brand fit into my world?
- Community—Does this brand make me feel like I belong?

These dimensions shift the focus from loyalty as a transaction to loyalty as an intrinsic, emotional connection. While the four bonds create the framework for how loyalty develops, the four dimensions determine whether it is meaningful and sustainable. Together, they provide a new way to think about loyalty—one that moves beyond mechanics and into the cultural, behavioral, and psychological forces that keep customers engaged.

This is the essence of relationship design—not just managing loyalty but designing it as an evolving, human-centered experience. The brands that thrive in this new reality don't just chase retention; they craft belonging.

Loyalty and brand building are inseparable. It's time to stop treating loyalty as a program and start shaping it as a competitive advantage driven by deeper human connections.



THE FOUR DIMENSIONS
OF LOYALTY

Country/category loyalty guides



COUNTRY-CATEGORY LOYALTY GUIDES

Brazil





Brazilian men make repeat purchases more than women

72%* of Brazilian men purchase their favorite brand at least 75% of the time vs. 61% of women

Higher-income households value Community

71%* of Brazilians from higher-income households (earning 70k+ reals) agreed with all four Community dimensions vs. 58% of Brazilians earning 14-69k reals and 59% of Brazilians earning less than 14k reals

Over a third of younger Brazilians see their favorite brands as cultural leaders

39%* of Gen Z Brazilians and 36%* of millennial Brazilians see their favorite brand as a cultural leader, compared to 25% of Gen X

Brazilian parents see more value in the cultural and Community dimensions of loyalty

- Parents in Brazil are more likely than those without children in the household to agree with all Potential dimensions (67%* vs. 59%), all Culture dimensions (66%* vs. 56%), and all Community dimensions (69%* vs. 55%)
- 68%* of Brazilian parents feel that exclusive-access offerings² add value to their favorite brand vs. 58% of people without children

BEHAVIORAL SCIENCE FINDINGS

Openness to Experience

Personality trait



53% High

Consumers high in openness prefer to try new things and may be more likely to try new brands.

47% Low

Consumers low in openness prefer routines and may purchase proven brands more often.

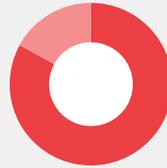
71%* of Brazilians with high openness feel that exclusive-access offerings² add value to their favorite brand (vs. 57%)

Brazilians with high openness agree more with all four dimensions of loyalty.

- All Principle dimensions (82%* vs. 69%)
- All Culture dimensions (67%* vs. 57%)
- All Potential dimensions (70%* vs. 57%)
- All Community dimensions (68%* vs. 58%)

Conscientiousness

Personality trait



83% High

Consumers high in conscientiousness tend to be detail oriented and complete tasks; they may value consistency in brands.

17% Low

Consumers low in conscientiousness have less detail orientation and may value different brand dimensions.

56%* of high-conscientiousness Brazilians feel that personal-data-control offerings¹ add value to their favorite brand (vs. 44%)

Motivational Focus

Risk tolerance



44% Neutral

31% Promotion

Consumers with a promotion focus tend to go for gains and may be more likely to try new brands.

25% Prevention

Consumers with a prevention focus tend to avoid risks and may stick with trusted brands.

68%* of prevention-focused Brazilians feel that consistent-reward offerings³ add value to their favorite brand (vs. 54%)

72%* of promotion-focused Brazilians feel that exclusive-access offerings² add value to their favorite brand (vs. 56%)

Data excerpted from Ogilvy's Global Loyalty Study with field partner Big Village's International CARAVAN survey, live May 28–June 3, 2024.

- * Indicates a statistically significantly higher percentage
- † Indicates a statistically significantly lower percentage
- 1 Simplifying my digital life and how my personal data is stored; Letting me control and/or profit from how my data is used
- 2 Giving me exclusive access to limited-edition products; Giving me early access to new products, sales, etc.; Providing exclusive experiences or exclusive access to public experiences
- 3 Recognizing how long I've been a customer; Rewarding me for consistent daily use/logins



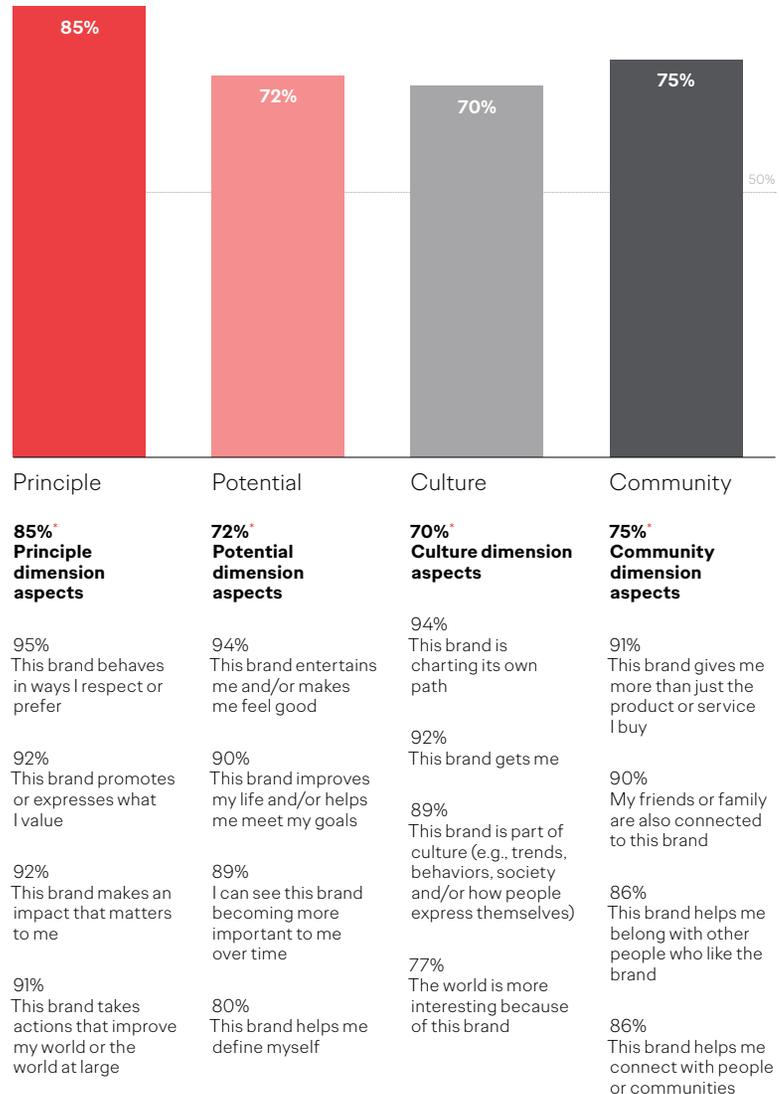
Accommodations and entertainment

We asked 101 consumers in Brazil with a favorite accommodations and entertainment brand about their behaviors, perceptions, and potential value adds from that favorite brand. We found that:

- 68% choose their favorite accommodations and entertainment brand at least 75% of the time.
- 30% see their favorite accommodations and entertainment brand as a cultural leader, and 65% see it as a reflector of culture.
- 81% think that exclusive or early access offerings would add value.

In Brazil, consumers place the most value on Principle when it comes to their favorite accommodations and entertainment brand. This stands in contrast to the other three categories—Community, Culture, and Potential.

Even though Principle scored highest, do not dismiss the importance of the top three statements in Potential, Culture, and Community. People are, obviously, keen to see the accommodations and entertainment brands they are loyal to entertain them and improve their lives, but they're also looking for those brands to deliver something novel, show that they understand their customers, and provide value adds.



Data excerpted from Ogilvy's Global Loyalty Study with field partner Big Village's International CARAVAN survey, live May 28–June 3, 2024.

* Indicates a statistically significantly higher percentage



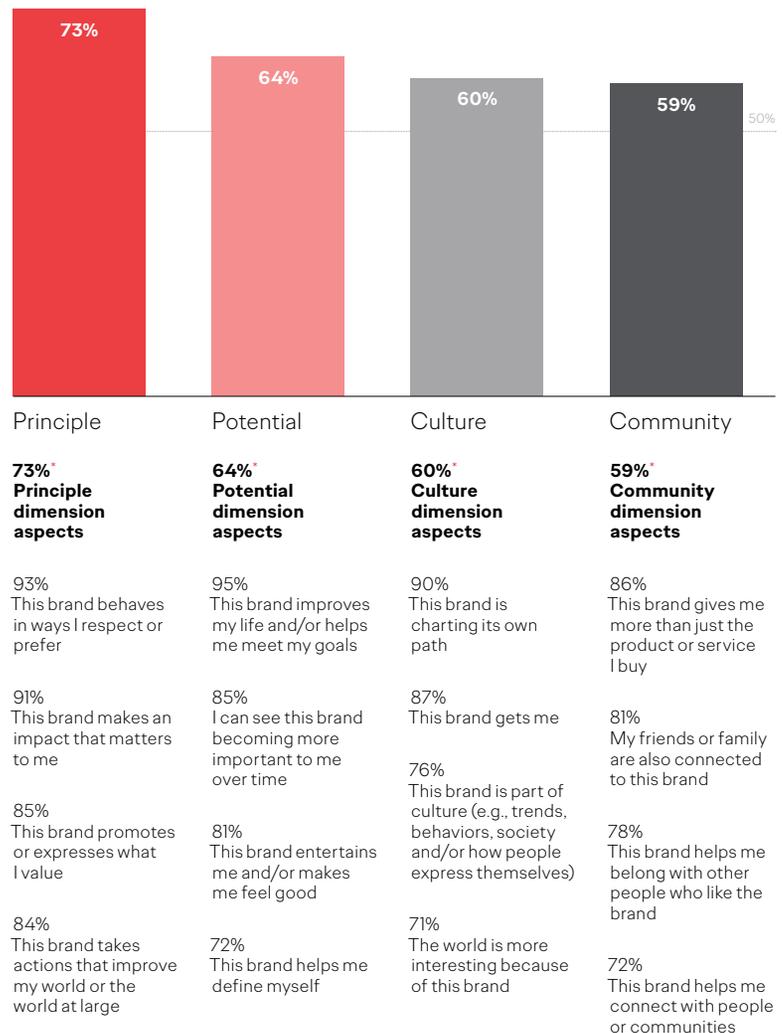
Financial services

We asked 101 consumers in Brazil with a favorite financial services brand about their behaviors, perceptions, and potential value adds from that favorite brand. We found that:

- 74% choose their favorite financial services brand at least 75% of the time.
- 32% see their favorite financial services brand as a cultural leader, and 47% see it as a reflector of culture.
- 49% feel that simplifying their digital life and how their personal data is stored would add value.

In Brazil, consumers place the most value on Principle when it comes to their favorite financial services brand. This stands in contrast to the other three categories—Community, Culture, and Potential.

Brazilian financial services customers want their brands to improve their lives and help them meet their goals. That's the most important factor for them, especially if you can simplify their digital lives. You can worry less about other parts of the Potential dimension, and you may want to shelve Community entirely. It's clear that customers are not looking for that with the same intensity in this category. That said, financial services brands should behave in ways that align with customer values, make an impact while doing so, and be sure to showcase their differentiation.



Data excerpted from Ogilvy's Global Loyalty Study with field partner Big Village's International CARAVAN survey, live May 28–June 3, 2024.

* Indicates a statistically significantly higher percentage



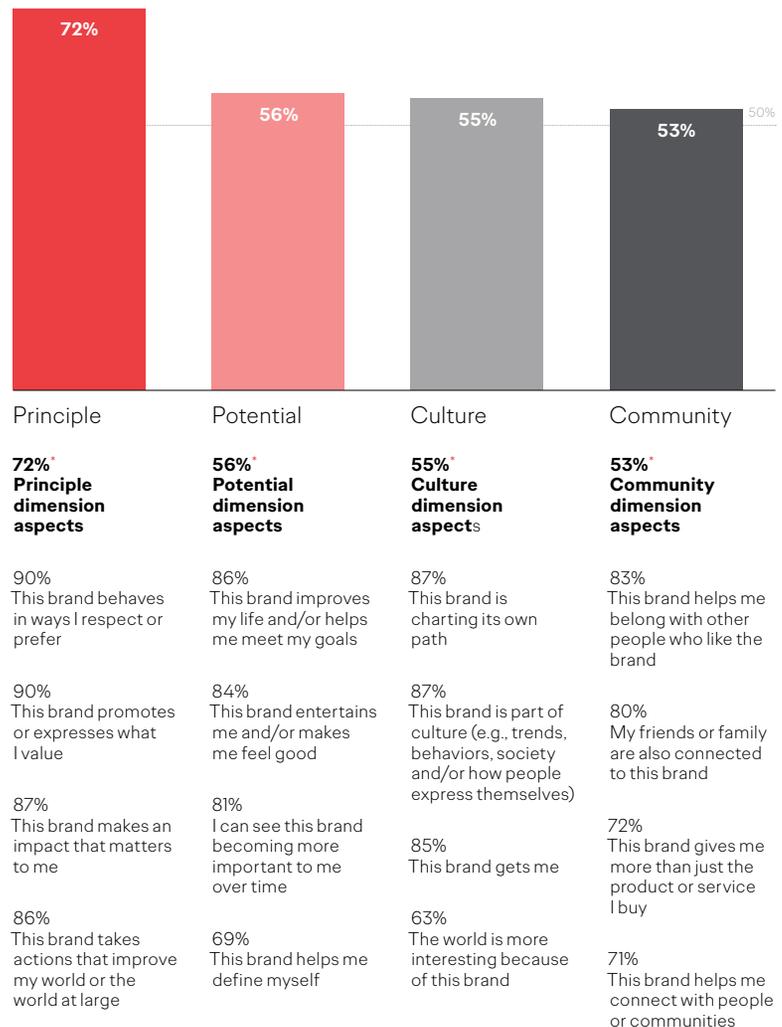
Retail

We asked 101 consumers in Brazil with a favorite retail brand about their behaviors, perceptions, and potential value adds from that favorite brand. We found that:

- 53% purchase their favorite retail brand at least 75% of the time.
- 31% see their favorite retail brand as a cultural leader, and 61% see it as a reflector of culture.
- 49% feel that being rewarded for consistent daily use/logins would add value.

In Brazil, consumers place the most value on Principle when it comes to their favorite retail brand. This stands in contrast to the other three categories—Community, Culture, and Potential.

Given that only about half of Brazilians purchase their favorite retail brand at least 75% of the time, retail brands have an opportunity to increase customer loyalty by demonstrating principles that their customers share, taking care not to get ahead of culture or invest too much in community building or consumer self-actualization. That said, pay attention to the consistency of your customers. They'd like to be recognized for that.



Data excerpted from Ogilvy's Global Loyalty Study with field partner Big Village's International CARAVAN survey, live May 28–June 3, 2024.

* Indicates a statistically significantly higher percentage



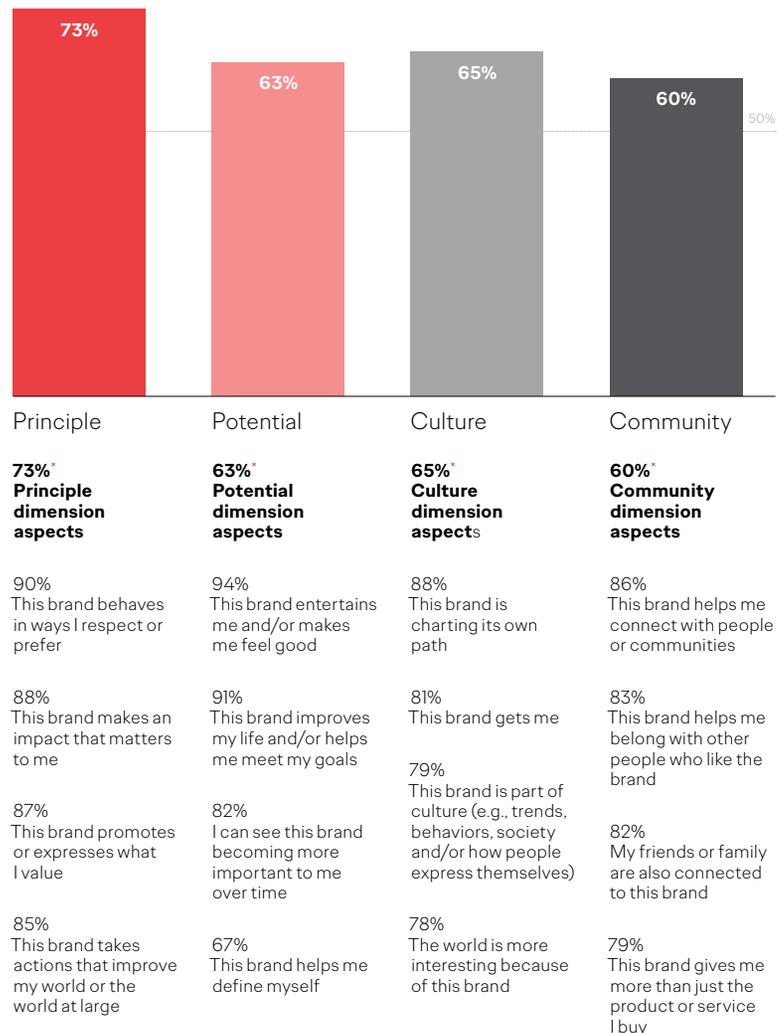
Technology

We asked 101 consumers in Brazil with a favorite technology brand about their behaviors, perceptions, and potential value adds from that favorite brand. We found that:

- 68% purchase their favorite technology brand at least 75% of the time.
- 47% see their favorite technology brand as a cultural leader, and 41% see it as a reflector of culture.
- 48% feel that simplifying their digital life and how their personal data is stored would add value.

In Brazil, consumers place the most value on Principle when it comes to their favorite technology brand. This stands in contrast to the other three categories—Community, Culture, and Potential.

Despite that, the most important factors for Brazilian technology consumers are your ability to entertain them and improve their lives and your ability to help them meet their goals—the top two statements in the Potential dimension. Loyal Brazilian technology customers want the brands they are loyal to share their behavioral expectations, but the way to lock in loyalty is to deliver good feelings while making life easier. Simplifying their digital lives will win their hearts, as will being clear about how their data is stored and used.



Data excerpted from Ogilvy's Global Loyalty Study with field partner Big Village's International CARAVAN survey, live May 28–June 3, 2024.

* Indicates a statistically significantly higher percentage



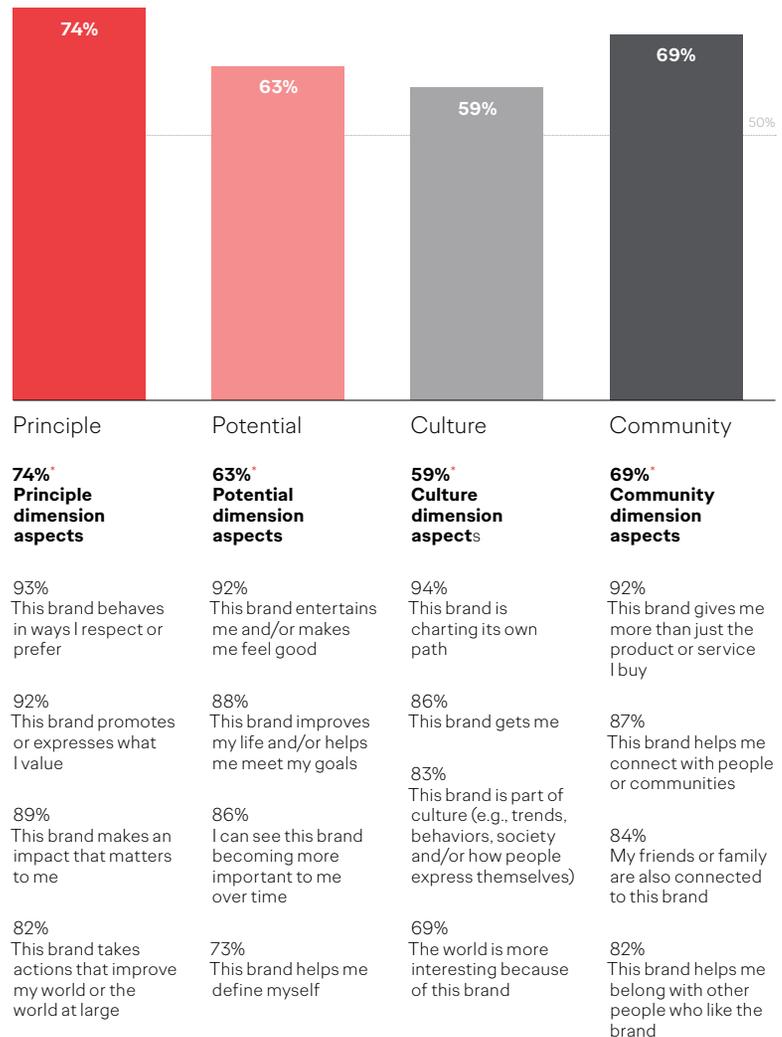
Travel and transportation

We asked 101 consumers in Brazil with a favorite travel and transportation brand about their behaviors, perceptions, and potential value adds from that favorite brand. We found that:

- 68% purchase their favorite travel and transportation brand at least 75% of the time.
- 34% see their favorite travel and transportation brand as a cultural leader, and 58% see it as a reflector of culture.
- 67% think that exclusive or early access offerings would add value.

In Brazil, consumers place the most value on Principle when it comes to their favorite travel and transportation brand. This stands in contrast to the other three categories—Community, Culture, and Potential.

Don't lose sight of some loyalty basics, like exclusive access, when courting this segment of the Brazilian marketplace. And while customers are expecting congruence with their values, they find strong brand differentiation to be the most important thing about the brands they are loyal to. Focus on that, on how your brand entertains customers, and on the many value adds you can offer, taking care to wrap your message in a sheen of Principles instead of leading with differentiation.



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COUNTRY-CATEGORY LOYALTY GUIDES

China





Women are more likely to prefer brands with which they find Community alignment

67%* agreed with all four Community dimensions (vs. 54% of men)

Chinese Gen Z are less likely to agree with the Community dimension of loyalty

40%[†] vs. 66% of millennials and 59% of Gen X

88% of Chinese Gen Z want exclusive access

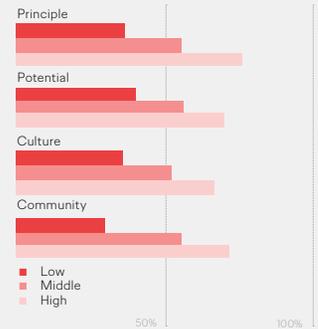
vs. 73% of millennials and 67% Gen X, who feel that exclusive-access offerings² add value to their favorite brand

Chinese parents make more repeat purchases

52%* of Chinese parents purchase their favorite brand at least 75% of the time vs. households without children, which do so at least 42% of the time.

- 69% agree with all Principle dimensions (vs. 53%)
- 62%* agree with all Culture dimensions (vs. 50%)
- 66%* agree with all Community dimensions (vs. 49%)

Chinese households with higher incomes agree more with new dimensions of loyalty



Middle-income Chinese value consistency rewards

52% of middle-income Chinese consumers (earning 130k-219k yuan) feel that consistency-reward offerings³ add value to their favorite brand (vs. vs. 33% of those earning less than 130K yuan and 33% of those earning more than 220K yuan)

BEHAVIORAL SCIENCE FINDINGS

Openness to Experience
Personality trait



51% Low

Consumers low in openness prefer routines and may purchase proven brands more often.

Chinese consumers with high openness:

- 68%* agree with all Potential dimensions (vs. 56%)
- 64% agree with all Culture dimension statements (vs. 52%)
- 65%* agree with all four Community dimensions (vs. 56%)
- 77%* feel that exclusive-access offerings² add value to their favorite brand (vs. 67%)

Conscientiousness
Personality trait



25% Low

Consumers low in conscientiousness have less detail orientation and may value different brand dimensions.

Chinese consumers with low conscientiousness:

- 40%* see their favorite brand as a cultural leader (vs. 31%)
- 45%* feel that consistency-reward offerings³ add value to their favorite brand (vs. 35%)
- 64%* agree with all four Potential dimensions (vs. 54%)
- 61%* see their favorite brand as a cultural reflector (vs. 48%)

Motivational Focus
Risk tolerance



27% Prevention

Consumers with a prevention focus tend to avoid risks and may stick with trusted brands.

Chinese consumers with a prevention focus:

- 62%* see their favorite brand as a cultural reflector (vs. 50% promotion)
- 47%[†] of Prevention-focused Chinese agree with all Community dimensions (vs. 70% promotion)

48% Neutral

25% Promotion

Consumers with a promotion focus tend to go for gains and may be more likely to try new brands.

Chinese consumers with a promotion focus:

- 42%* see their favorite brand as a cultural leader (vs. 25% prevention)
- More likely to agree with all Principle dimensions (75%* vs. 55% prevention)
- More likely to agree with all Potential dimensions (70%* vs. 53%) and all Culture dimensions (64%* vs. 49%)

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- * Indicates a statistically significantly higher percentage
- † Indicates a statistically significantly lower percentage
- 1 Simplifying my digital life and how my personal data is stored; Letting me control and/or profit from how my data is used
- 2 Giving me exclusive access to limited-edition products; Giving me early access to new products, sales, etc.; Providing exclusive experiences or exclusive access to public experiences
- 3 Recognizing how long I've been a customer; Rewarding me for consistent daily use/logins



Accommodations and entertainment

We asked 101 consumers in China with a favorite accommodations and entertainment brand about their behaviors, perceptions, and potential value adds from that favorite brand. We found that:

- 43% choose their favorite accommodations and entertainment brand at least 75% of the time.
- 39% see their favorite accommodations and entertainment brand as a cultural leader, and 54% see it as a reflector of culture.
- 48% would value personalization to meet their needs.

In China, consumers tend to value the four dimensions of loyalty roughly equally when it comes to their favorite accommodations and entertainment brand.

Given that less than half of Chinese consumers choose their favorite accommodations and entertainment brand at least 75% of the time, these brands have an opportunity to increase customer loyalty by demonstrating principles that their customers share, taking care not to get ahead of culture or invest too much in community building or consumer self-actualization. Additional key factors are eliciting positive emotions and fostering bonding through mutual understanding.



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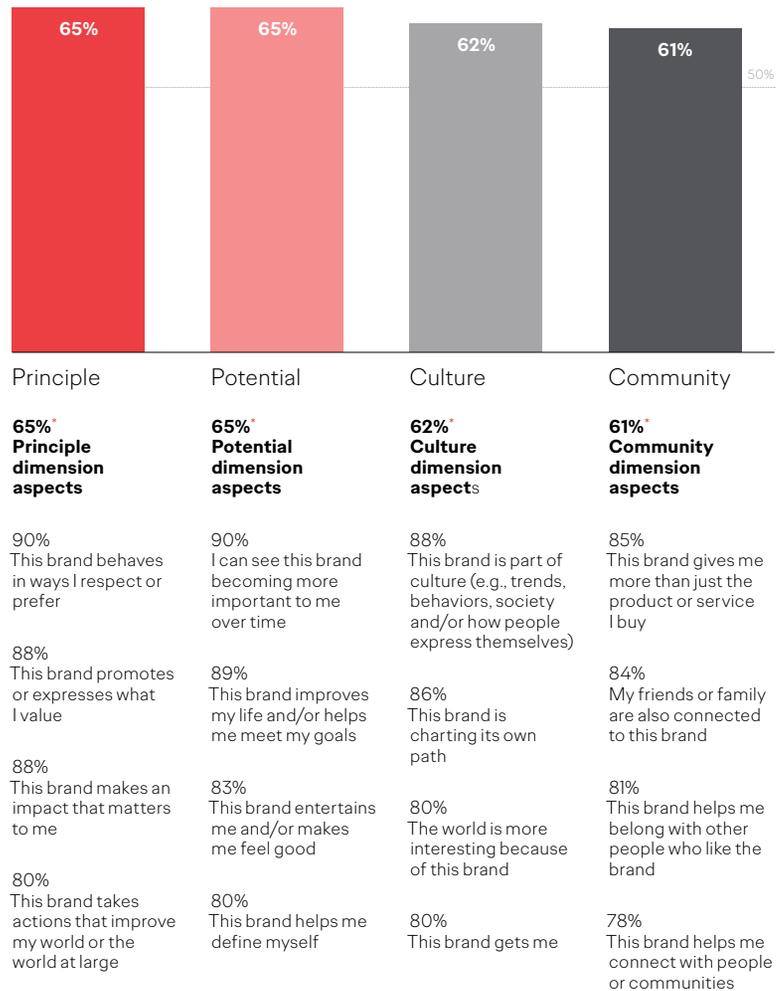
Financial services

We asked 101 consumers in China with a favorite financial services brand about their behaviors, perceptions, and potential value adds from that favorite brand. We found that:

- 57% choose their favorite financial services brand at least 75% of the time.
- 31% see their favorite financial services brand as a cultural leader, and 59% see it as a reflector of culture.
- 48% would value personalization to meet their needs.

In China, consumers tend to value the four dimensions of loyalty roughly equally when it comes to their favorite financial services brand.

More than half of Chinese consumers demonstrate high levels of loyalty to their favorite financial services brand, and the key to retaining their loyalty (and to win the loyalty of the other 43%) is to behave in ways that track with your customers' values and promote those values, too, seeking to make an impact in harmony with them. Customers want your financial services brand to become more important to them over time and to improve their lives, and the former is an outcome of the latter, particularly if you recognize the tenure a customer has with you. Don't forget about culture: loyal financial services customers want your brand to be part of the culture, albeit with an individual spin, but not ahead of it.



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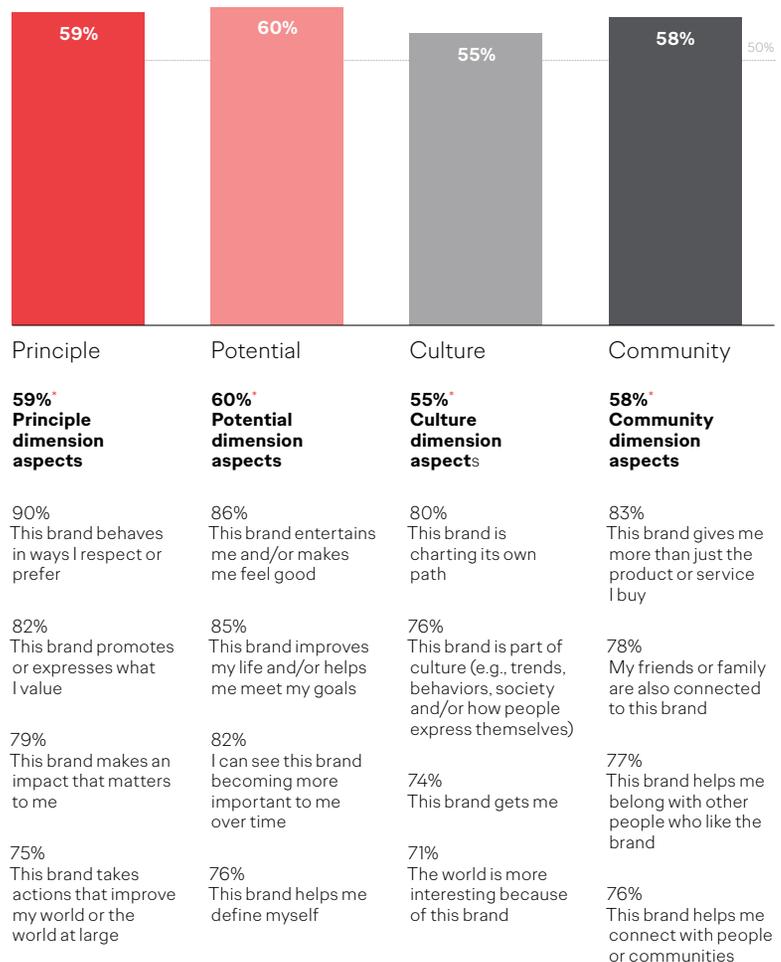


Retail

We asked 101 consumers in China with a favorite retail brand about their behaviors, perceptions, and potential value adds from that favorite brand. We found that:

- 45% purchase their favorite retail brand at least 75% of the time.
- 31% see their favorite retail brand as a cultural leader, and 59% see it as a reflector of culture.
- 55% would value personalization to meet their needs.

In China, consumers tend to place slightly less value on the Culture dimension of loyalty when it comes to their favorite retail brand, compared to Potential, Principle, and Community, which makes sense when you consider the inherently heterogeneous nature of retail, particularly in China. That same factor also explains the relatively low levels of loyalty and suggests that the way to attract more loyal customers is by behaving in accordance with the principles your customers share, while also providing good experiences—ones, perhaps, beyond the purchase—that improve customers’ lives.



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Technology

We asked 101 consumers in China with a favorite technology brand about their behaviors, perceptions, and potential value adds from that favorite brand. We found that:

- 54% purchase their favorite technology brand at least 75% of the time.
- 35% see their favorite technology brand as a cultural leader, and 53% see it as a reflector of culture.
- 53% would value personalization to meet their needs.

In China, consumers tend to place slightly less value on the Culture dimension of loyalty when it comes to their favorite technology brand, compared to Potential, Principle, and Community, but they still expect their technology brand to be part of culture.

Chinese customers are more loyal to their favorite technology brand than to most other categories studied, which likely has to do with product and brand factors. Retaining that loyalty and earning new customers depends on proper brand behavior and the expression thereof, but the most important factor for loyal Chinese technology customers is the ability of the brand to entertain them or make them feel good. This suggests that they are looking for useful experiences in harmony with culture.



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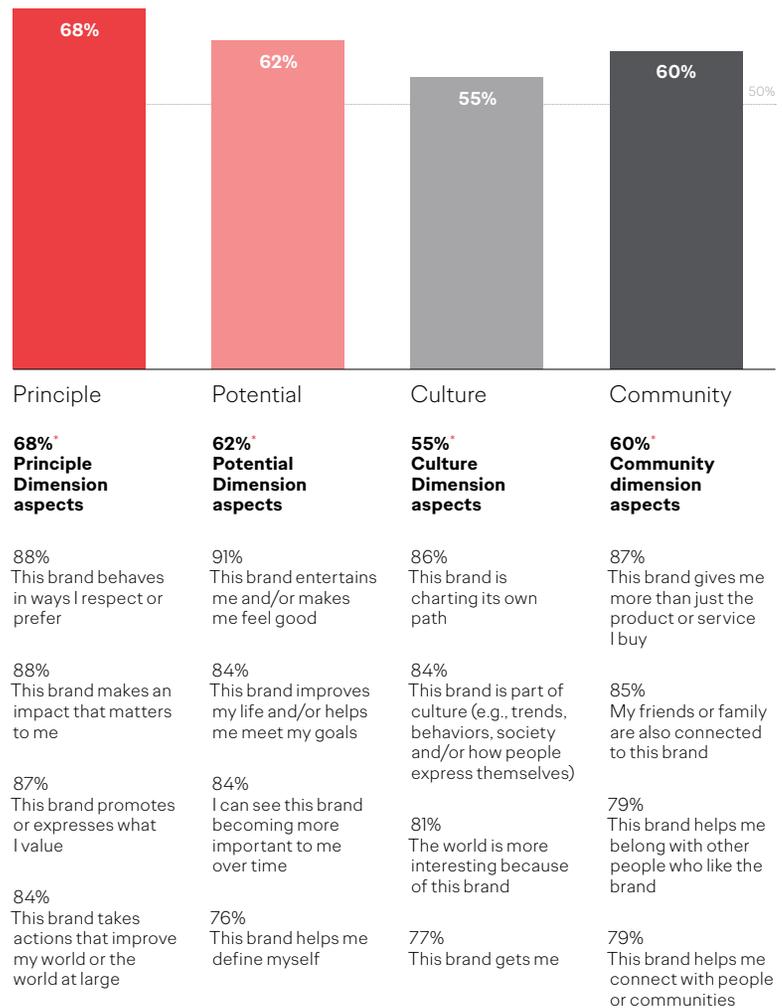


Travel and transportation

We asked 101 consumers in China with a favorite travel and transportation brand about their behaviors, perceptions, and potential value adds from that favorite brand. We found that:

- 47% purchase their favorite travel and transportation brand at least 75% of the time.
- 31% see their favorite travel and transportation brand as a cultural leader, and 63% see it as a reflector of culture.
- 49% would value personalization to meet their needs.

In China, consumers place the most value on Principle when it comes to their favorite travel and transportation brand. However, these brands must also be distinctive and deliver more than just what the customer purchases if they're to reward the customers who are loyal to them and attract new ones. Similarly, loyal Chinese travel and transportation customers, unsurprisingly, will be looking for entertaining, feel-good experiences reflective of the culture.



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COUNTRY-CATEGORY LOYALTY GUIDES

Germany





Men make more repeat purchases than women

53%* of German men purchase their favorite brand at least 75% of the time vs. 41% of women

German men are more likely than women to see their favorite brand as a cultural reflector (49%* vs. 35%)

Higher-income households make more repeat purchases...

57%* of German higher-income households (earning € 50k+) purchase their favorite brand at least 75% of the time vs. 49% of middle-income (€ 30k-49k) and 34% of lower-income households (less than € 30k)

...and want brands to foster relationships

More members of high-income households are likely to agree that "This brand helps me connect with people or communities" (61% vs. 49% of middle-income households and 48% of lower-income households)

Gen Z make fewer repeat purchases than all generations

34%* purchase their favorite brand at least 75% of the time, compared to all other generations (47% millennials, 50% Gen X, 53% boomers)

— Gen Z is less likely to agree with all four Potential dimension statements, compared to all other generations (23%* vs. 37% millennials, 42% Gen X, 47% boomers)

— German baby boomers were more likely to agree with all four Principle dimension statements, compared to all other generations (66%* vs. 33% Gen Z, 38% millennials, 44% Gen X)

Parents make fewer repeat purchases

50% of German households without children purchase their favorite brand at least 75% of the time vs. 41% of German parents

BEHAVIORAL SCIENCE FINDINGS

Openness to Experience
Personality trait



55%
Low

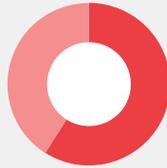
Consumers low in openness prefer routines and may purchase proven brands more often.

No significant differences in German consumers based on the openness to experience personality dimension.

45%
High

Consumers high in openness prefer to try new things and may be more likely to try new brands.

Conscientiousness
Personality trait



41%
Low

Consumers low in conscientiousness have less detail orientation and may value different brand dimensions.

No significant differences in German consumers based on the personality dimension of conscientiousness.

59%
High

Consumers high in conscientiousness tend to be detail oriented and complete tasks; they may value consistency in brands.

Motivational Focus
Risk tolerance



26%
Prevention

Consumers with a prevention focus tend to avoid risks and may stick with trusted brands.

German consumers with a promotion focus are more likely to purchase their favorite brand at least 75% of the time, compared to those with a prevention or neutral focus (56% vs. 41% and 44%, respectively).

43%
Neutral

31%
Promotion

Consumers with a promotion focus tend to go for gains and may be more likely to try new brands.

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- 3 Recognizing how long I've been a customer; Rewarding me for consistent daily use/logins

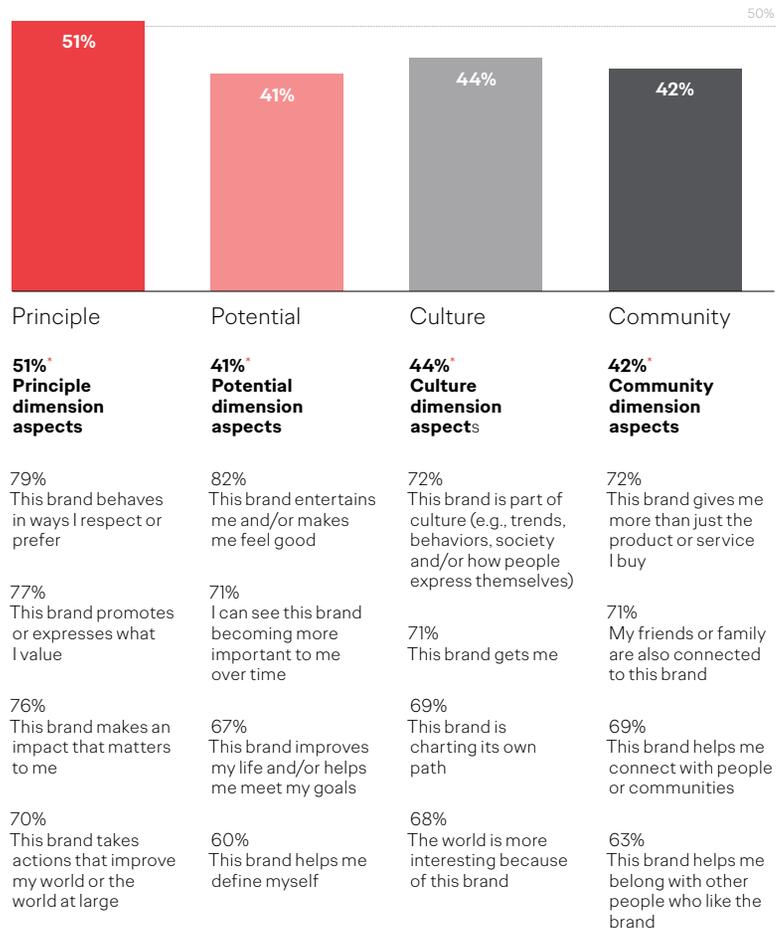


Accommodations and entertainment

We asked 100 consumers in Germany with a favorite accommodations and entertainment brand about their behaviors, perceptions, and potential value adds from that favorite brand. We found that:

- 53% purchase their favorite accommodations and entertainment brand at least 75% of the time.
- 33% see their favorite accommodations and entertainment brand as a cultural leader, and 44% see it as a reflector of culture.
- 49% would value a brand recognizing how long they have been a customer.

In German consumers place the most value on Principle when it comes to their favorite accommodations and entertainment brand. Attracting more loyal customers and satisfying the ones they have will require German accommodations and entertainment brands to demonstrate principles they share with their customers. Most important to customers are, however, experiences that entertain and make customers feel good, which should be no surprise given the sector. What is surprising is just how loyal German accommodations and entertainment customers are.



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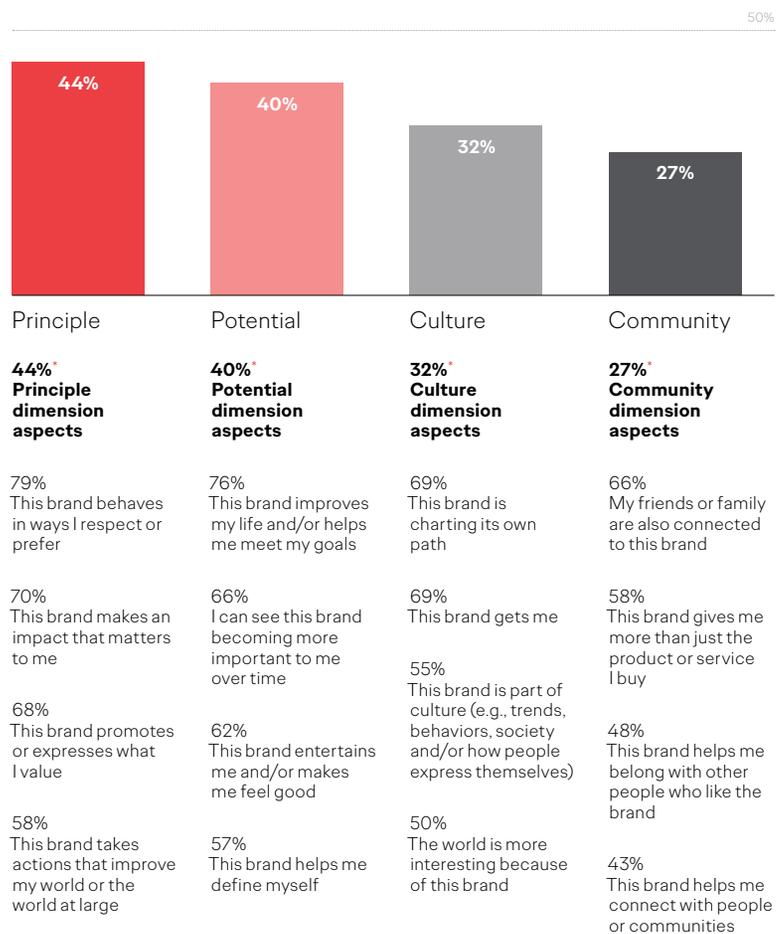


Financial services

We asked 101 consumers in Germany with a favorite financial services brand about their behaviors, perceptions, and potential value adds from that favorite brand. We found that:

- 47% purchase their favorite financial services brand at least 75% of the time.
- 21% see their favorite financial services brand as a cultural leader, and 41% see it as a reflector of culture.
- 46% would value a brand recognizing how long they have been a customer.

In Germany, consumers place the most value on Principle and Potential when it comes to their favorite financial services brand. Building and maintaining loyalty will depend on brand behavior and impact along with a laser focus on improving customers' lives. While Culture and especially Community are of less importance in this sector, brand differentiation is essential.



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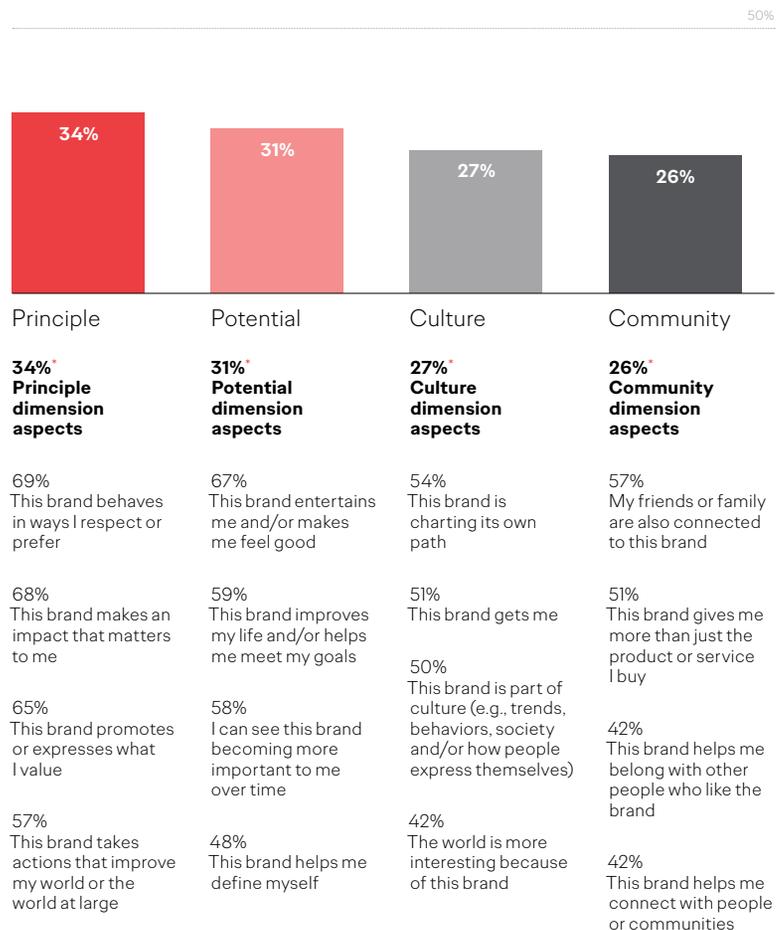
Retail

We asked 101 consumers in Germany with a favorite retail brand about their behaviors, perceptions, and potential value adds from that favorite brand. We found that:

- 41% purchase their favorite retail brand at least 75% of the time.
- 36% see their favorite retail brand as a cultural leader, and 33% see it as a reflector of culture.
- 38% would value a brand recognizing how long they have been a customer.

In Germany, consumers place the most value on Principle when it comes to their favorite retail brand, but all four dimensions of loyalty are less important to loyal retail consumers than they are to those in any other category. Moreover, German retail buyers are also less frequent purchasers.

Nevertheless, customers still identify with several statements in each of the four dimensions of loyalty by strong majorities. Pay heed to your retail brand's behavior, impact, and promotion of values—and make sure those are in harmony with those of your customers. While you're at it, tending to your customers' experiences is well worth your effort.



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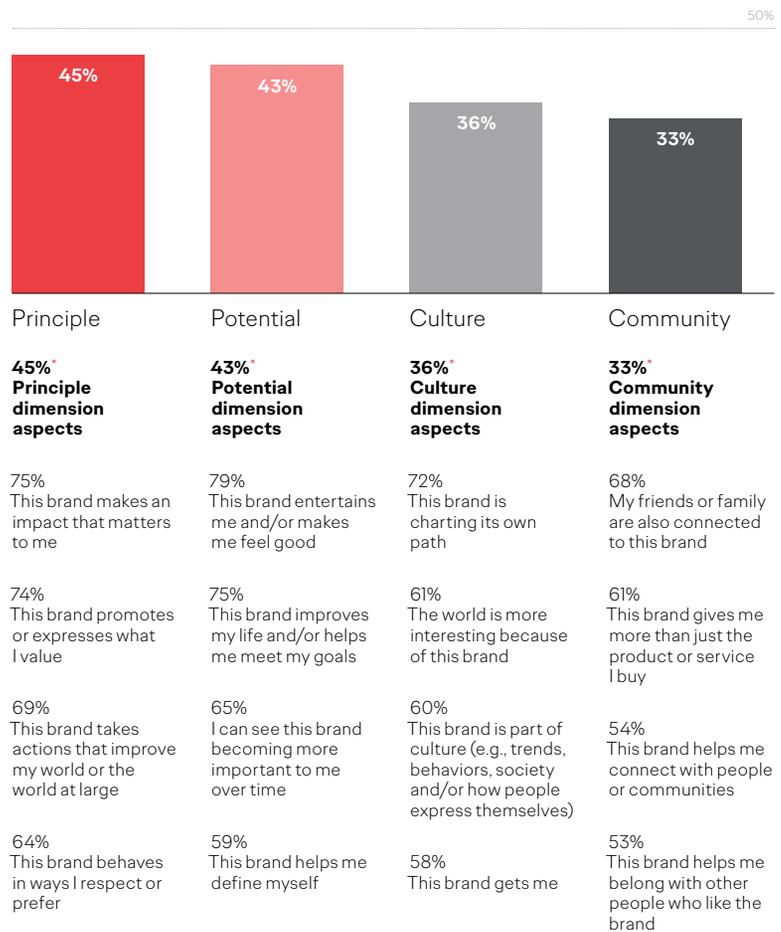
Technology

We asked 101 consumers in Germany with a favorite technology brand about their behaviors, perceptions, and potential value adds from that favorite brand. We found that:

- 51% purchase their favorite technology brand at least 75% of the time.
- 27% see their favorite technology brand as a cultural leader, and 49% see it as a reflector of culture.
- 46% would value personalization to meet their needs.

Germany, consumers place the most value on Principle and Potential when it comes to their favorite technology brand, and they are second only to retail and entertainment customers in their loyal buying habits, which may have much to do with the nature of consumer technology ecosystems.

Add to their numbers by providing entertaining, feel-good experiences while improving the lives of your customers. Like customers in other categories, German technology customers want their brands to be differentiated and to make an impact that matters to them while promoting values they share.



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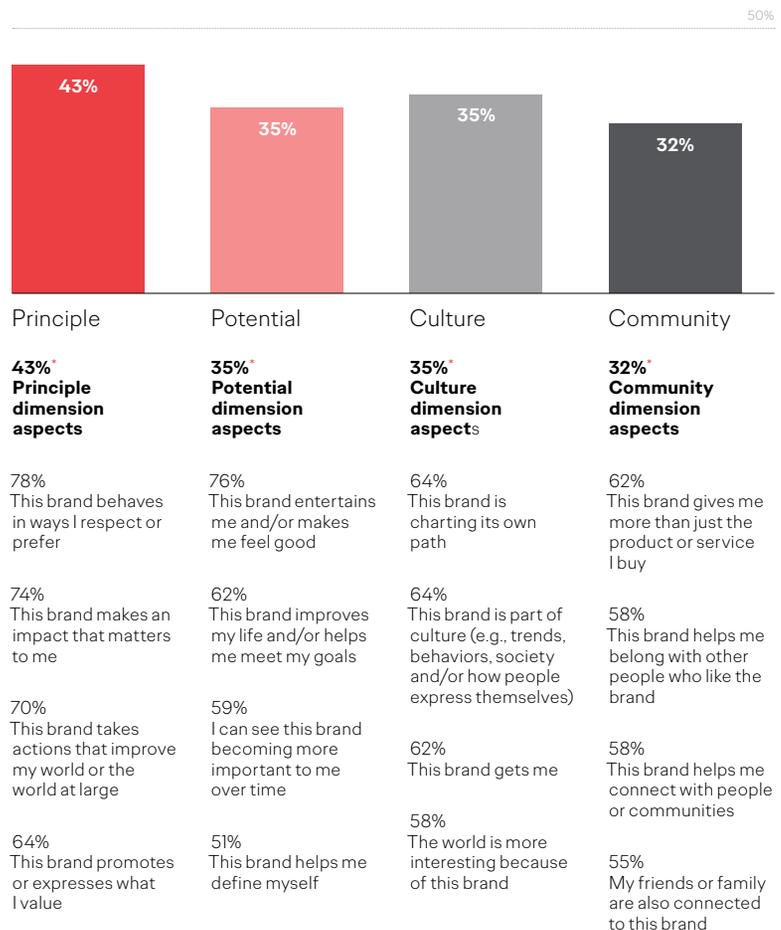
Travel and transportation

We asked 101 consumers in Germany with a favorite travel and transportation brand about their behaviors, perceptions, and potential value adds from that favorite brand. We found that:

- 44% purchase their favorite travel and transportation brand at least 75% of the time.
- 27% see their favorite travel and transportation brand as a cultural leader, and 45% see it as a reflector of culture.
- 59% would value early or exclusive-access offerings.

In Germany, consumers place the most value on Principle when it comes to their favorite travel and transportation brand, and in particular, they're looking for brand behavior and impact that are congruent with their values.

Unsurprisingly, loyal German travel and transportation customers want to be sure the brand experience entertains them or makes them feel good. Even though Culture and Community are not as central to German customers, there are clear preferences for added value, differentiation, and cultural harmony.



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COUNTRY-CATEGORY LOYALTY GUIDES

India





78% of Indian women resonate with the Potential loyalty dimension

Women in India are more likely than men to agree with all Potential dimensions (vs. 68% of men)

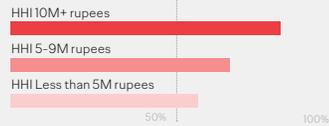
Indian parents agree more with new dimensions of loyalty

Parents in India are more likely than those without children in the household to agree with all

- Potential dimensions (78%* vs. 62%)
- Culture dimensions (67%* vs. 54%)
- Community dimensions (71%* vs. 60%)

Higher-income Indian households make more repeat purchases

HIGHER HHIs MAKE MORE REPEAT PURCHASES

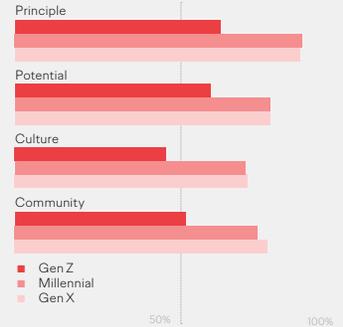


...and resonate more with new dimensions of loyalty

- 87%* agree with all Principal dimensions statements (vs. 77% and 76%)
- 82%* agree with all Potential dimensions (vs. 71% and 68%)
- 81%* agree with all Community dimensions (vs. 63% and 61%)
- 75%* agree with all Culture dimensions (vs. 59% and 58%)

Indian Gen Z agree less with new dimensions of loyalty

GEN Z VIBES LESS ON NEW DIMENSIONS OF LOYALTY



BEHAVIORAL SCIENCE FINDINGS

Openness to Experience

Personality trait



62% High

Consumers high in openness prefer to try new things and may be more likely to try new brands.

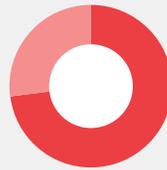
Consumers low in openness prefer routines and may purchase proven brands more often.

Indians with high openness to experience:

- 70%* purchase their favorite brand at least 75% of the time (vs. 60%)
- 83%* agree with all Principle dimensions about their favorite brand (vs. 74%)
- 78%* agree with all Potential dimensions (vs. 64%)
- 67%* agree with all four Culture dimensions (vs. 57%)
- 73%* agree with all Community dimensions (vs. 58%)

Conscientiousness

Personality trait



73% High

Consumers high in conscientiousness tend to be detail oriented and complete tasks; they may value consistency in brands.

Consumers low in conscientiousness have less detail orientation and may value different brand dimensions.

Indian consumers with high conscientiousness:

- 70%* purchase their favorite brand at least 75% of the time (vs. 55%)
- 67%* agree with all Culture dimensions (vs. 52%)
- 70%* agree with all Community dimensions (vs. 60%)

Motivational Focus

Risk tolerance



49% Neutral

29% Promotion

Consumers with a promotion focus tend to go for gains and may be more likely to try new brands.

Consumers with a prevention focus tend to avoid risks and may stick with trusted brands.

- 76%* Indians with a promotion focus agree with all Potential dimensions vs. 64% of those with a prevention focus

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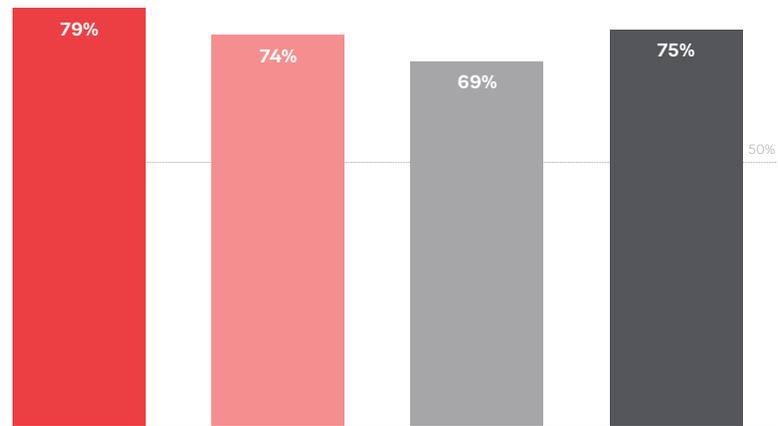
Accommodations and entertainment

We asked 101 consumers in India with a favorite accommodations and entertainment brand about their behaviors, perceptions, and potential value adds from that favorite brand. We found that:

- 79% purchase their favorite accommodations and entertainment brand at least 75% of the time.
- 33% see their favorite accommodations and entertainment brand as a cultural leader, and 60% see it as a reflector of culture.
- 47% would value personalization to meet their needs.

In India, consumers place a relatively high value on all dimensions of loyalty when it comes to their favorite accommodations and entertainment brand. In fact, loyal Indian consumers in this category are the most enthusiastic group about all aspects of the four dimensions. Given that such consumers have high rates of loyalty, accommodations and entertainment brands will find it rewarding to meet their expectations.

This group of consumers scored high on all the individual statements, giving accommodations and entertainment brands a wealth of choice in messaging, but there are some essentials. You must behave as your customers expect and take actions to improve their world or the world at large. In keeping with that, be sure to offer entertainment or good feelings, which should be job #1 for a brand in this space anyway. Finally, be aware of customer tenure and give loyal ones more than just what they pay for.



Principle	Potential	Culture	Community
79%* Principle dimension aspects	74%* Potential dimension aspects	69%* Culture dimension aspects	75%* Community dimension aspects
94% This brand behaves in ways I respect or prefer	95% This brand entertains me and/or makes me feel good	89% This brand is part of culture (e.g., trends, behaviors, society and/or how people express themselves)	91% This brand gives me more than just the product or service I buy
91% This brand takes actions that improve my world or the world at large	91% I can see this brand becoming more important to me over time	88% This brand gets me	90% This brand helps me connect with people or communities
89% This brand promotes or expresses what I value	88% This brand improves my life and/or helps me meet my goals	85% This brand is charting its own path	89% This brand helps me belong with other people who like the brand
89% This brand makes an impact that matters to me	87% This brand helps me define myself	80% The world is more interesting because of this brand	89% My friends or family are also connected to this brand

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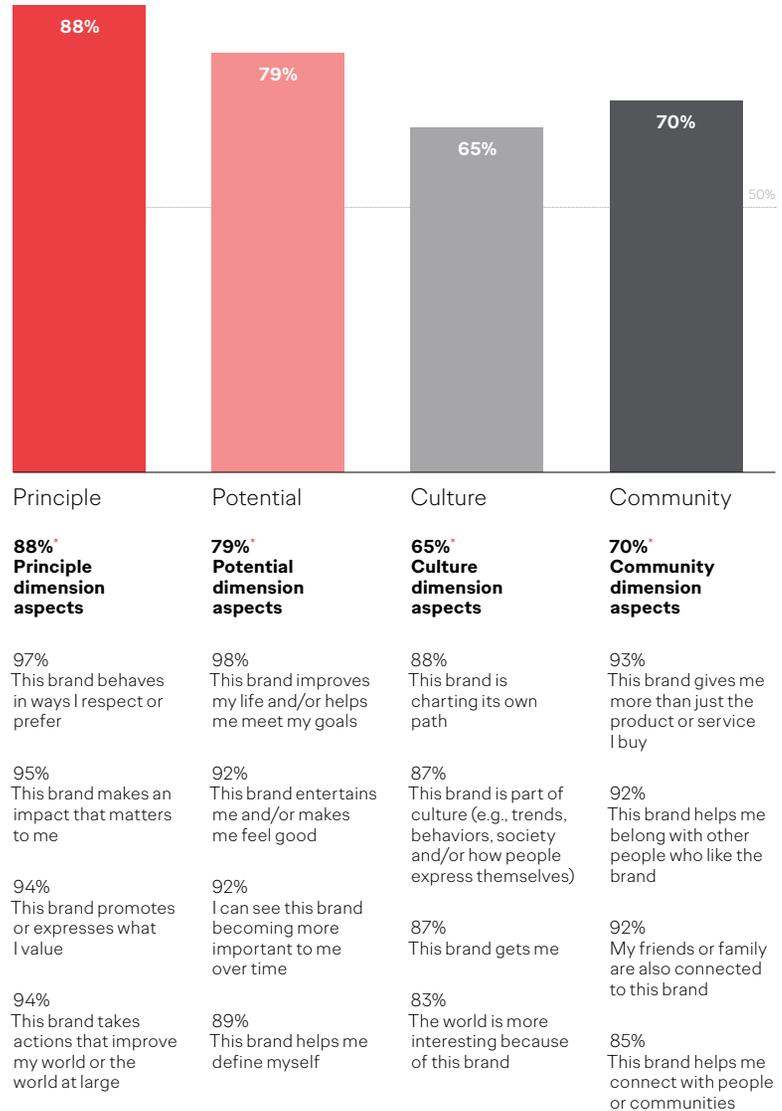


Financial services

We asked 101 consumers in India with a favorite financial services brand about their behaviors, perceptions, and potential value adds from that favorite brand. We found that:

- 67% purchase their favorite financial services brand at least 75% of the time.
- 39% see their favorite financial services brand as a cultural leader, and 47% see it as a reflector of culture.
- 44% would value personalization to meet their needs.

In India, consumers place the most value on Principle when it comes to their favorite financial services brand, and that is due to high agreement with all four of the statements for that dimension. Financial services brands should, therefore, be certain to act and communicate in ways congruent with customer values, but they should also make certain that they improve customers' lives while providing added value—ideas that anchor the strong showing for Potential and Community. Loyal Indian customers have a surprisingly strong showing for Community, suggesting that financial services brands should invest more in creating belonging and activating social ties. While Culture is the least potent dimension for financial services, it still scores high, and brands should strive to be part of, but not ahead of, culture while remaining differentiated.



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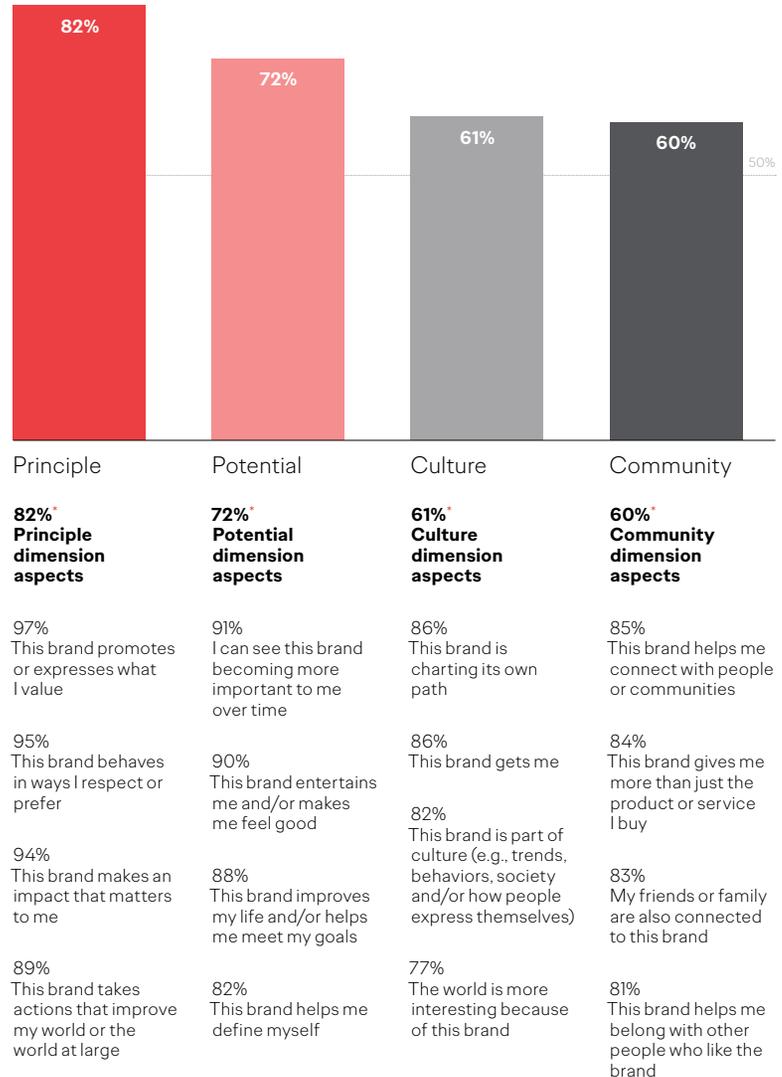


Retail

We asked 101 consumers in India with a favorite retail brand about their behaviors, perceptions, and potential value adds from that favorite brand. We found that:

- 62% purchase their favorite retail brand at least 75% of the time.
- 45% see their favorite retail brand as a cultural leader, and 45% see it as a reflector of culture.
- 48% would value personalization to meet their needs.

In India, consumers place the most value on Principle when it comes to their favorite retail brand. Their high degree of loyalty in this category suggests that attentive brands can invest more in cost-efficient customer retention. The key to that loyalty is Principle, and especially the expression—in promotion and behavior—of values similar to those of the customer. Impact is also essential, so retail brands wishing to retain loyal Indian customers should be sure that those shared values positively influence society, as those customers want to see their retail favorites increase in importance to them.



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* Indicates a statistically significantly higher percentage



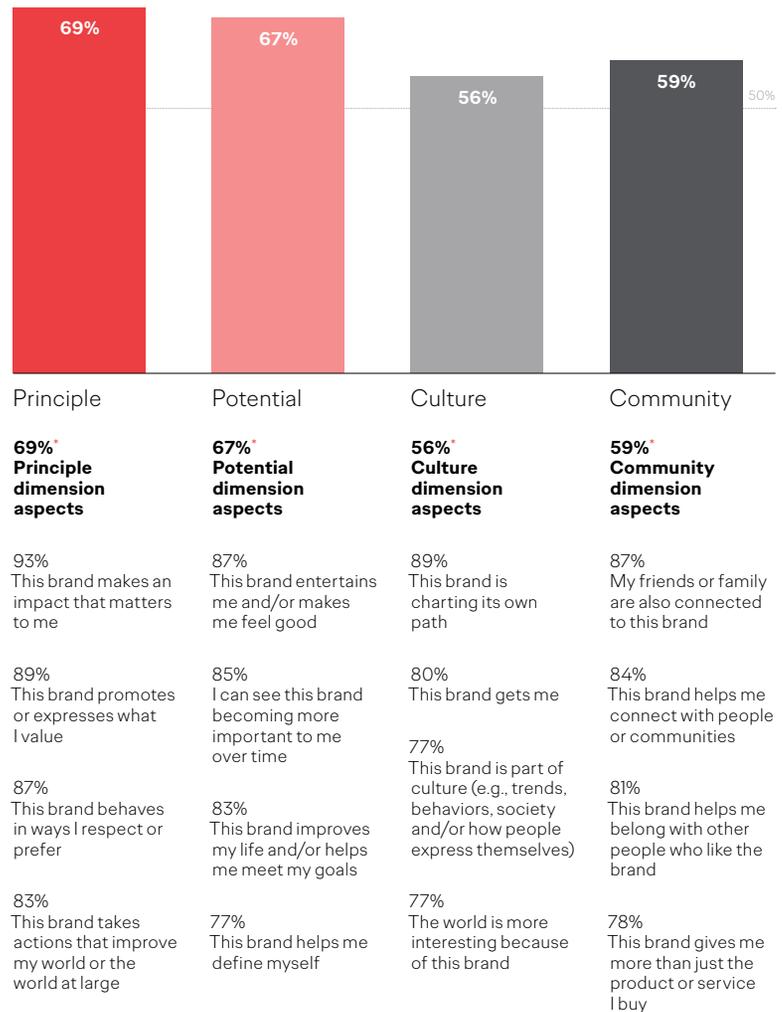
Technology

We asked 101 consumers in India with a favorite technology brand about their behaviors, perceptions, and potential value adds from that favorite brand. We found that:

- 62% purchase their favorite technology brand at least 75% of the time.
- 37% see their favorite technology brand as a cultural leader, and 43% see it as a reflector of culture.
- 51% would value a brand simplifying their digital life and how their personal data is stored.

In India, consumers place the most value on Principle and Potential when it comes to their favorite technology brand, but on balance, loyal Indian technology customers have a lower identification with the four dimensions of loyalty than customers in other categories.

This outlier category still demands compatible principles, especially regarding the impact it has on the things that matter to customers—their experiences included. Indian technology customers are keyed in to the cultural and community aspects of their purchases and want brands to stand out while also being widely acceptable to their social circle.



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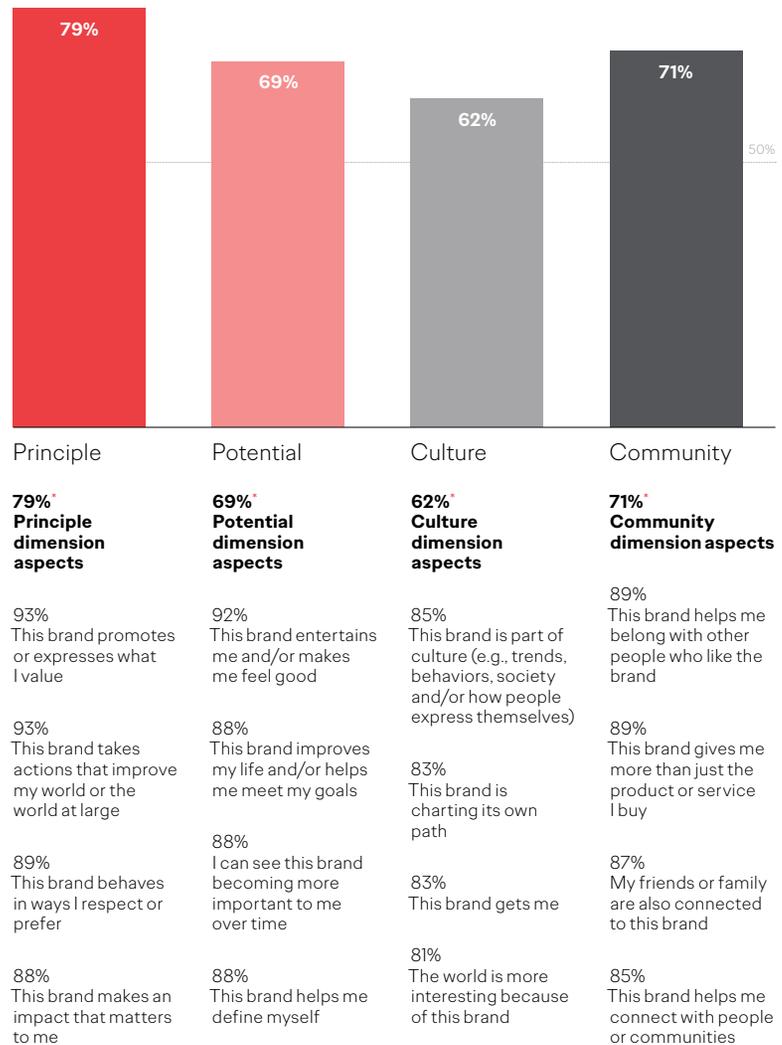


Travel and transportation

We asked 101 consumers in India with a favorite travel and transportation brand about their behaviors, perceptions, and potential value adds from that favorite brand. We found that:

- 59% purchase their favorite travel and transportation brand at least 75% of the time.
- 32% see their favorite travel and transportation brand as a cultural leader, and 52% see it as a reflector of culture.
- 79% would value early or exclusive-access offerings

In India, consumers place the most value on Principle when it comes to their favorite travel and transportation brand, and they want these brands to express coinciding values while acting to improve the world and behaving well in the eyes of the customer. As is expected for the travel and transportation category, customers want great experiences and added value, but they also look to these brands for a sense of belonging, suggesting that Indian travel and transportation customers may view community building and the fostering of social connection as important jobs for these brands.



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COUNTRY-CATEGORY LOYALTY GUIDES

Mexico



CUSTOMER INSIGHTS

Mexican parents were more likely to agree with the four dimensions of loyalty

- They also purchase their favorite brand at least 75% of the time (62%* vs. 52%)

Lower-income Mexican households (earning less than 60k pesos, vs. 60k-149k and 150k pesos or more) are less likely to agree with the four dimensions of loyalty

They are also less likely to purchase their favorite brand at least 75% of the time (47%[†] vs. 64% and 68%, respectively)

MEXICO



Gen X Mexicans are frequent purchasers

- They are more likely than other generations to purchase their favorite brand at least 75% of the time (73%* vs. 48% Gen Z, 59% millennials)
- They are more likely than other generations to agree with all four Principle dimension statements (82%* vs. 51% Gen Z, 71% millennials)

Gen Z Mexicans were

- Less likely to agree with all four Culture dimension statements (47%[†] vs. 61% millennials and 63% Gen X, respectively)
- Less likely to agree with all four Community dimension statements (43%[†] vs. 56% millennials and 61% Gen X, respectively)

BEHAVIORAL SCIENCE FINDINGS

Openness to Experience

Personality trait



60% High

Consumers high in openness prefer to try new things and may be more likely to try new brands.

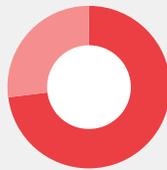
Consumers low in openness prefer routines and may purchase proven brands more often.

Mexicans with high openness to experience are:

- More likely to purchase their favorite brand at least 75% of the time (63%* vs. 53%)
- More likely to feel that exclusive-access offerings² add value to their favorite brand (68%* vs. 59%)

Conscientiousness

Personality trait



73% High

Consumers high in conscientiousness tend to be detail oriented and complete tasks; they may value consistency in brands.

Consumers low in conscientiousness have less detail orientation and may value different brand dimensions.

Mexican consumers with high conscientiousness are:

- More likely to purchase their favorite brand at least 75% of the time (62%* vs. 51%)

Motivational Focus

Risk tolerance



38% Neutral

34% Promotion

Consumers with a promotion focus tend to go for gains and may be more likely to try new brands.

Mexicans with a promotion focus are more likely to agree with all four Potential dimension statements than those with a prevention focus (68%* vs. 56%), as well as agree with all four Culture dimension statements (60%* vs. 49%)

28% Prevention
Consumers with a prevention focus tend to avoid risks and may stick with trusted brands.

Mexicans with a prevention focus are less likely to feel that exclusive-access offerings² add value to their favorite brand than those with a promotion or neutral focus (55%[†] vs. 69% and 67%, respectively)

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- ¹ Simplifying my digital life and how my personal data is stored; Letting me control and/or profit from how my data is used
- ² Giving me exclusive access to limited-edition products; Giving me early access to new products, sales, etc.; Providing exclusive experiences or exclusive access to public experiences
- ³ Recognizing how long I've been a customer; Rewarding me for consistent daily use/logins

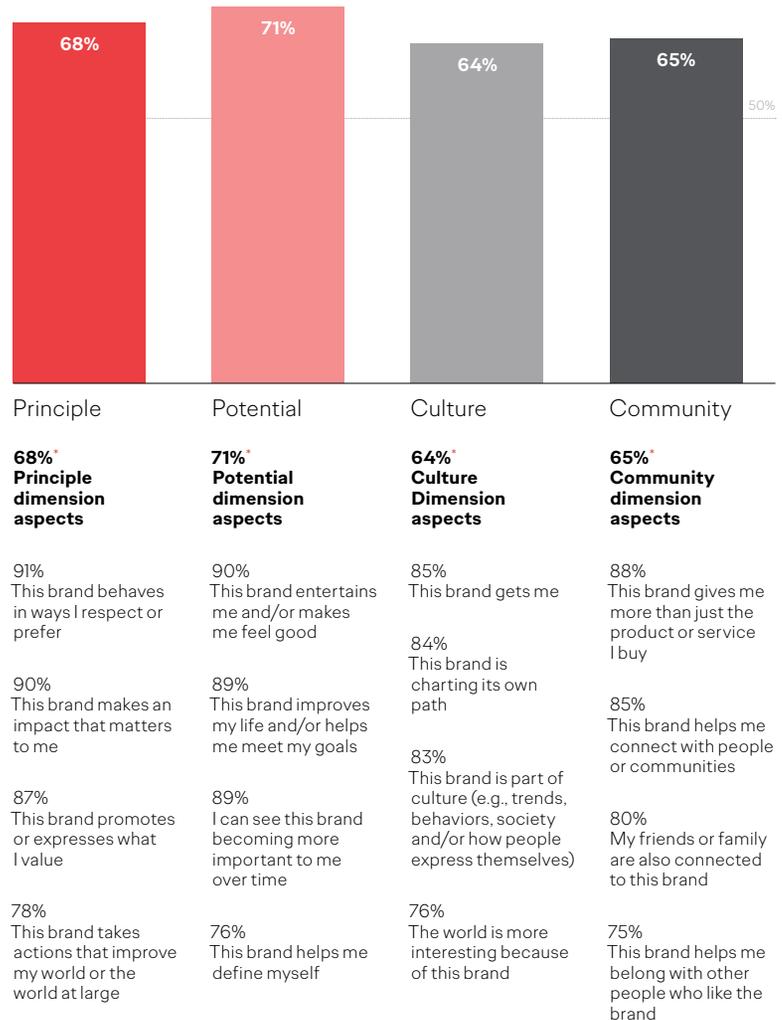


Accommodations and entertainment

We asked 100 consumers in Mexico with a favorite accommodations and entertainment brand about their behaviors, perceptions, and potential value adds from that favorite brand. We found that:

- 65% purchase their favorite accommodations and entertainment brand at least 75% of the time.
- 29% see their favorite accommodations and entertainment brand as a cultural leader, and 56% see it as a reflector of culture.
- 70% would value early or exclusive-access offerings.

In Mexico, consumers place similar levels of value on each dimension of loyalty when it comes to their favorite accommodations and entertainment brand, but brand behavior, impact, and value expression are important to loyal customers. Accommodations and entertainment customers in Mexico want brands to provide great experiences and improve their lives, and, if they do, such customers are prepared to become even more loyal, especially if they are rewarded with added value.



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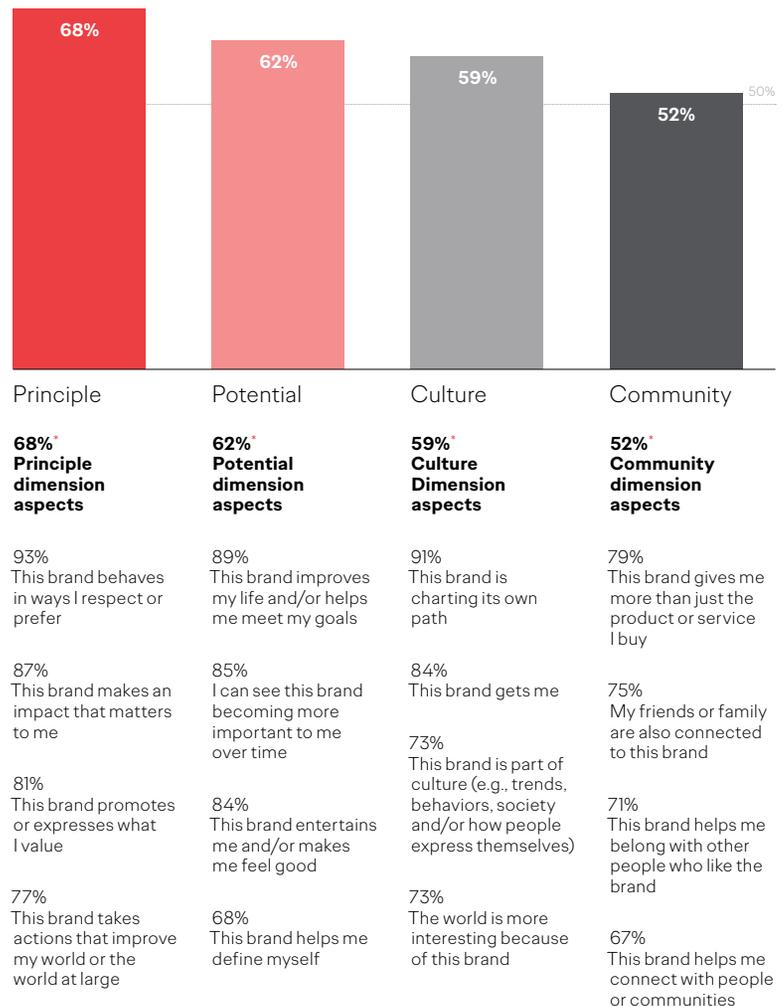


Financial services

We asked 101 consumers in Mexico with a favorite financial services brand about their behaviors, perceptions, and potential value adds from that favorite brand. We found that:

- 59% purchase their favorite financial services brand at least 75% of the time.
- 29% see their favorite financial services brand as a cultural leader, and 53% see it as a reflector of culture.
- 55% would value a brand simplifying their digital life and how their personal data is stored.

In Mexico, consumers place the most value on Principle when it comes to their favorite financial services brand and the least value on Community. The dimensions Culture and Potential fall somewhere in the middle. That overall pattern conceals some high points for loyal customers, though. Those Consumers want their financial services brand to behave in a way they like and make their world better. They want to see these brands make an impact that matters to them personally, and one such way to do that is to improve their digital lives.



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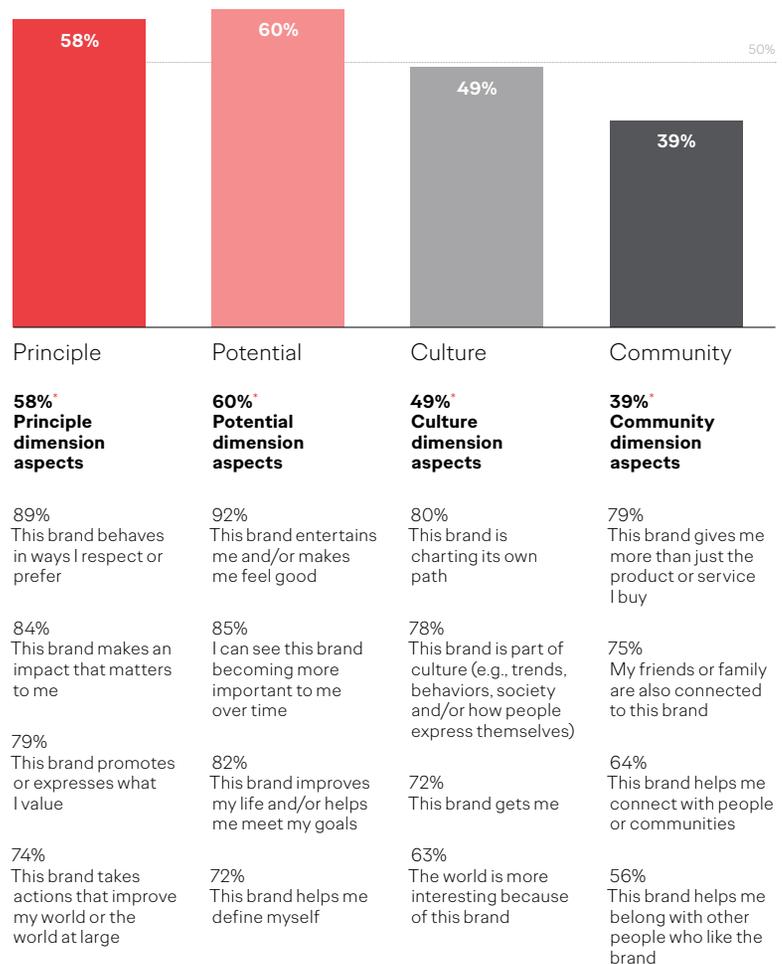
Retail

We asked 102 consumers in Mexico with a favorite retail brand about their behaviors, perceptions, and potential value adds from that favorite brand. We found that:

- 60% purchase their favorite retail brand at least 75% of the time.
- 29% see their favorite retail brand as a cultural leader, and 44% see it as a reflector of culture.
- 69% would value early or exclusive-access offerings.

In Mexico, consumers place the most value on Potential and Principle when it comes to their favorite retail brand.

The retail category in Mexico has a high percentage of loyal customers, and the way to maintain their custom and attract new loyalists is to focus on the most salient ideas for them: brand experience, with its cousin, brand behavior, close behind.



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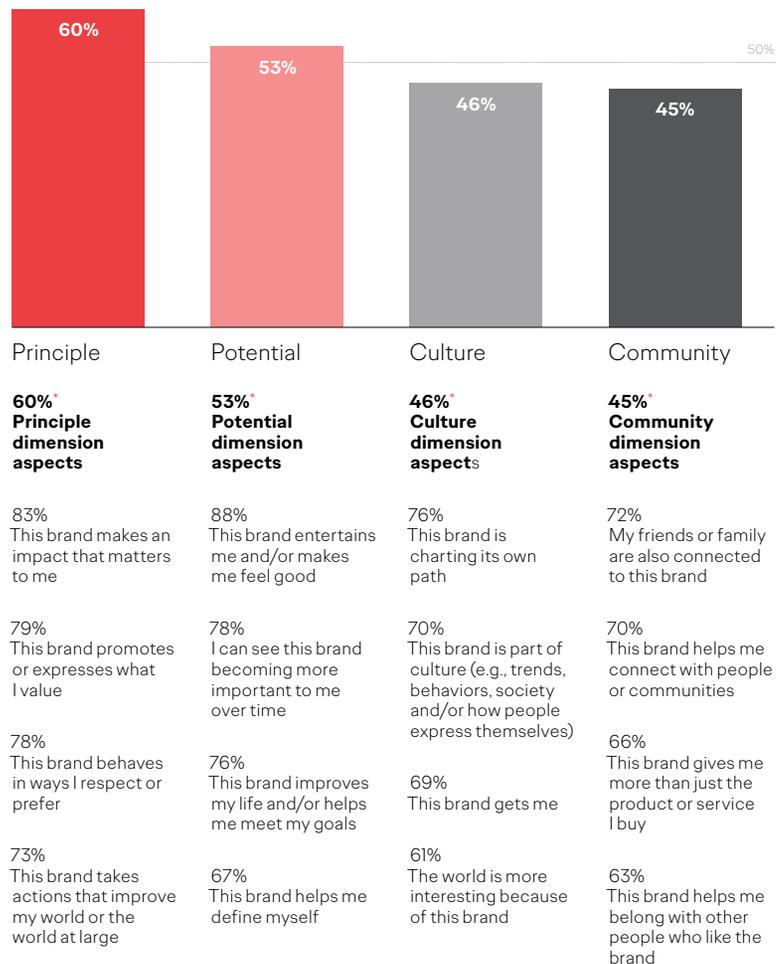
Technology

We asked 101 consumers in Mexico with a favorite technology brand about their behaviors, perceptions, and potential value adds from that favorite brand. We found that:

- 48% purchase their favorite technology brand at least 75% of the time.
- 36% see their favorite technology brand as a cultural leader, and 46% see it as a reflector of culture.
- 50% would value a brand simplifying their digital life and how their personal data is stored.

In Mexico, consumers place the most value on Principle when it comes to their favorite technology brand. This stands in contrast to Community and Culture, with Potential falling in the middle.

Given that only about half of Mexicans purchase their favorite technology brand at least 75% of the time, tech brands have an opportunity to increase customer loyalty by demonstrating principles that their customers share, taking care not to get ahead of culture or invest too much in community building or consumer self-actualization. However, loyal customers—and, therefore, people who could become loyal—are looking for entertaining, feel-good brand experiences and personal impact.



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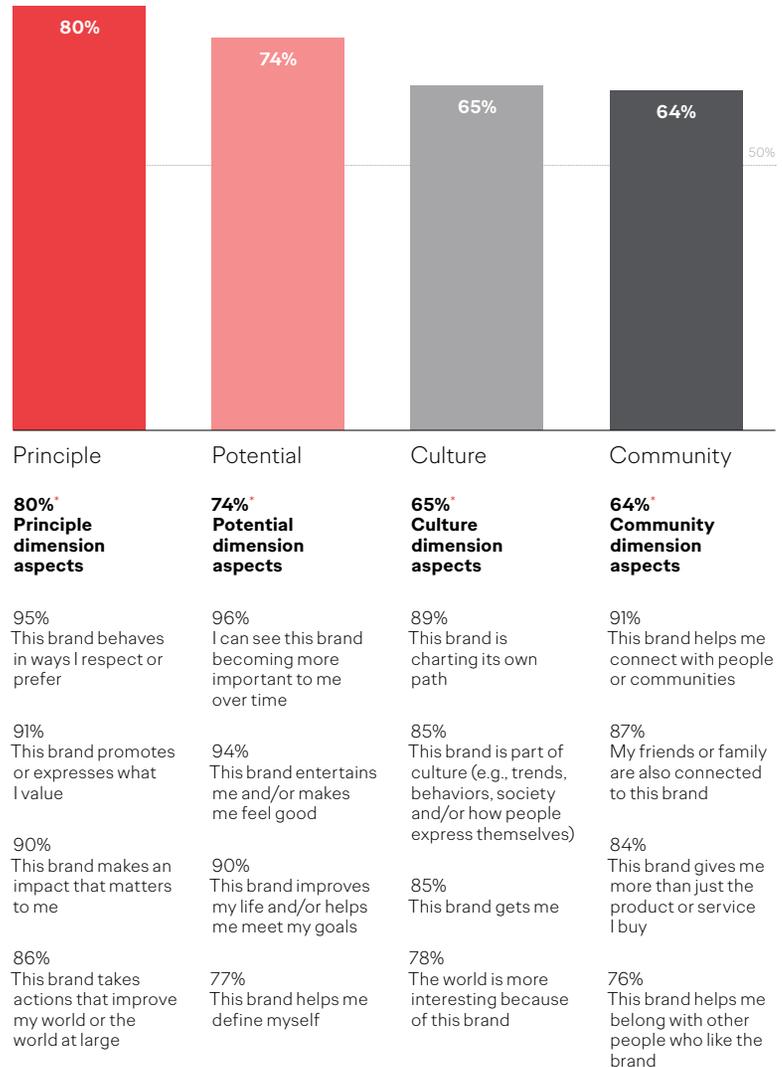
Travel and transportation

We asked 101 consumers in Mexico with a favorite travel and transportation brand about their behaviors, perceptions, and potential value adds from that favorite brand. We found that:

- 61% purchase their favorite travel and transportation brand at least 75% of the time.
- 35% see their favorite travel and transportation brand as a cultural leader, and 53% see it as a reflector of culture.
- 73% would value early or exclusive-access offerings.

In Mexico, consumers place the most value on Principle when it comes to their favorite travel and transportation brand.

The details reveal a more nuanced story. The cluster of highest-scoring statements argues for building a strong emotional relationship based on values, experience, utility, and connection. If your brand does that, Mexican travel and transportation customers are prepared to increase their loyalty.



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COUNTRY-CATEGORY LOYALTY GUIDES

United Kingdom





66% of UK women want brands to recognize their loyalty

UK women were more likely than men to feel that consistency-reward offerings³ add value to their favorite brand (66%* vs. 57%)

In the UK, household income does not drive differences in loyalty

In contrast to findings from other countries, no differences in agreement with dimensions of loyalty were detected for UK consumers based on income level

Suburban UK consumers were less likely to agree with all four Potential dimension statements

compared to urban and rural consumers (30%[†] vs. 41% and 45%, respectively)

The same holds true for parents

Parents in the UK are more likely than those without children in the household to agree with all four Potential dimension statements (44%* vs. 32%)

51% of UK Gen Z see their favorite brand as a cultural leader

(51%* vs. 38% millennials, 36% Gen X, and 26% boomers)

73% of UK Gen X

feel that consistency-reward offerings³ add value to their favorite brand (73%), compared to Gen Z (53%) and millennials (57%)

UK millennials

were more likely than Gen X or boomers to agree with all four Community dimension statements (41%* vs. 25% for Gen X and 24% for boomers)

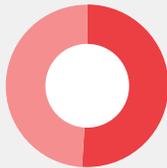
UK baby boomers

were less likely than all other generations to see personal-data-control offerings¹ as adding value to their favorite brand (22%[†] vs. 39% Gen Z, 41% millennials, 41% Gen X)

BEHAVIORAL SCIENCE FINDINGS

Openness to Experience

Personality trait



49% Low

51% High

Consumers high in openness prefer to try new things and may be more likely to try new brands.

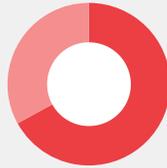
Consumers low in openness prefer routines and may purchase proven brands more often.

UK consumers with high openness to experience are:

- More likely to see their favorite brand as a cultural reflector (37%* vs. 27%)
- More likely to agree with all four Principle dimension statements about their favorite brand (52%* vs. 40%)
- More likely to agree with all four Potential dimension statements (43%* vs. 31%)
- More likely to agree with all four Culture dimension statements (41%* vs. 27%)
- More likely to agree with all four Community dimension statements (38%* vs. 27%)

Conscientiousness

Personality trait



33% Low

67% High

Consumers high in conscientiousness tend to be detail oriented and complete tasks; they may value consistency in brands.

Consumers low in conscientiousness have less detail orientation and may value different brand dimensions.

UK consumers with high conscientiousness are:

- More likely to agree with all four Potential dimension statements (40%* vs. 31%)

Motivational Focus

Risk tolerance



37%

43% Neutral

20% Promotion

Consumers with a prevention focus tend to avoid risks and may stick with trusted brands.

Consumers with a promotion focus tend to go for gains and may be more likely to try new brands.

UK consumers with a promotion focus are:

- More likely to agree with all four Potential dimension statements than those with a prevention or neutral focus (52%* vs. 30% and 36%, respectively)
- More likely to agree with all four Community dimension statements, compared to those with a prevention focus (40%* vs. 27%)

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- 3 Recognizing how long I've been a customer; Rewarding me for consistent daily use/logins

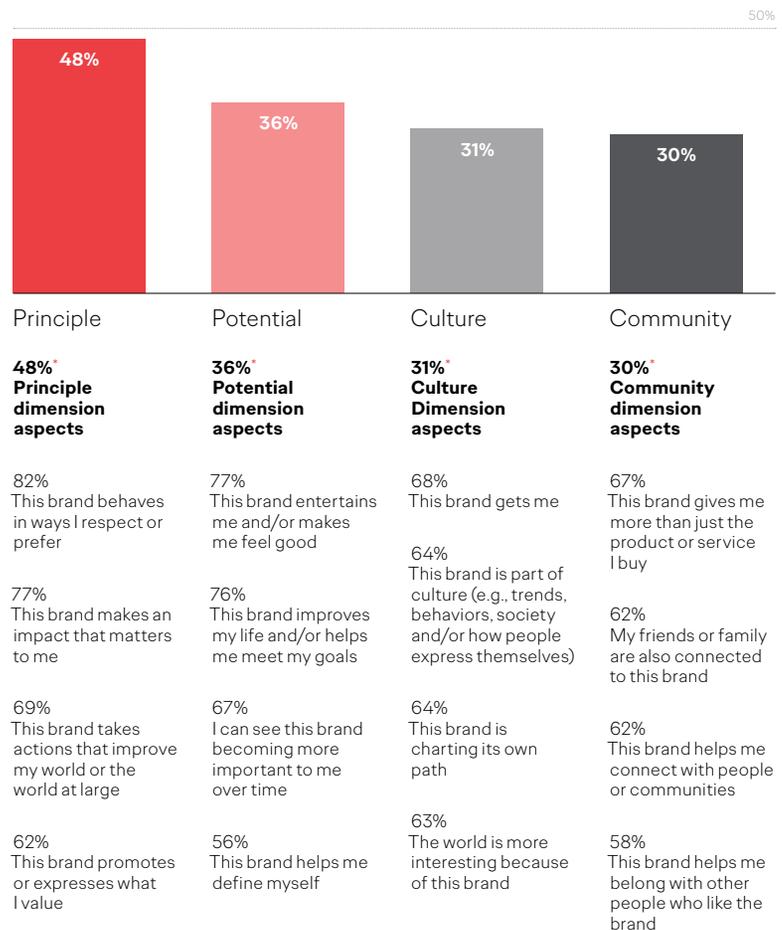


Accommodations and entertainment

We asked 101 consumers in the UK with a favorite accommodations and entertainment brand about their behaviors, perceptions, and potential value adds from that favorite brand. We found that:

- 41% purchase their favorite accommodations and entertainment brand at least 75% of the time.
- 51% see their favorite accommodations and entertainment brand as a cultural leader, and 27% see it as a reflector of culture.
- 53% would value recognition of how long they have been a customer.

In the UK, consumers place the most value on Principle when it comes to their favorite accommodations and entertainment brand. It is higher-rated than the other dimensions of loyalty, revealing the importance of congruent values and preferred brand behavior. As values expression comes in a fair distance below brand actions, be careful to live out the values you share with your customers. There is room to increase the number of consumers loyal to your accommodations and entertainment brand if you succeed in that.



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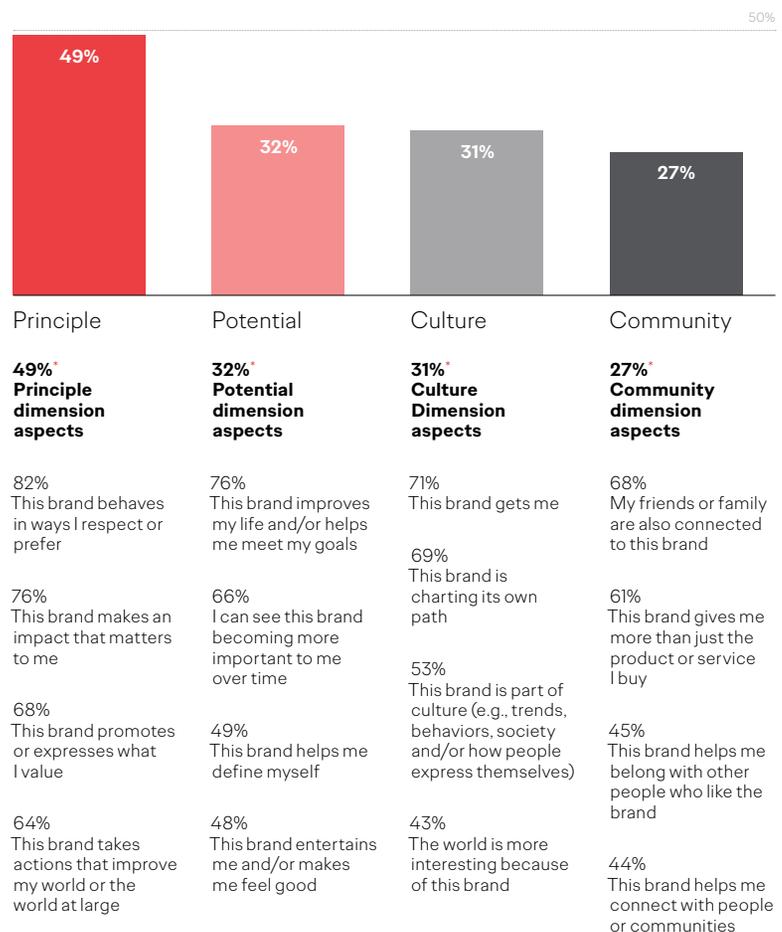
Financial services

We asked 101 consumers in the UK with a favorite financial services brand about their behaviors, perceptions, and potential value adds from that favorite brand. We found that:

- 38% purchase their favorite financial services brand at least 75% of the time.
- 34% see their favorite financial services brand as a cultural leader, and 28% see it as a reflector of culture.
- 46% would value personalization to meet their needs.

In the UK, consumers place the most value on Principle when it comes to their favorite financial services brand.

Their emphasis on principles is even more pronounced for financial services than it is for other categories in the UK. Loyal financial services customers are after tangible demonstrations of value alignment and meaningful improvement in their lives. Often, financial services relationships are sticky, but only about one-third of UK consumers are highly loyal. Therefore, focusing on the impact your brand can have for its customers will be an effective way to attract more loyal customers.



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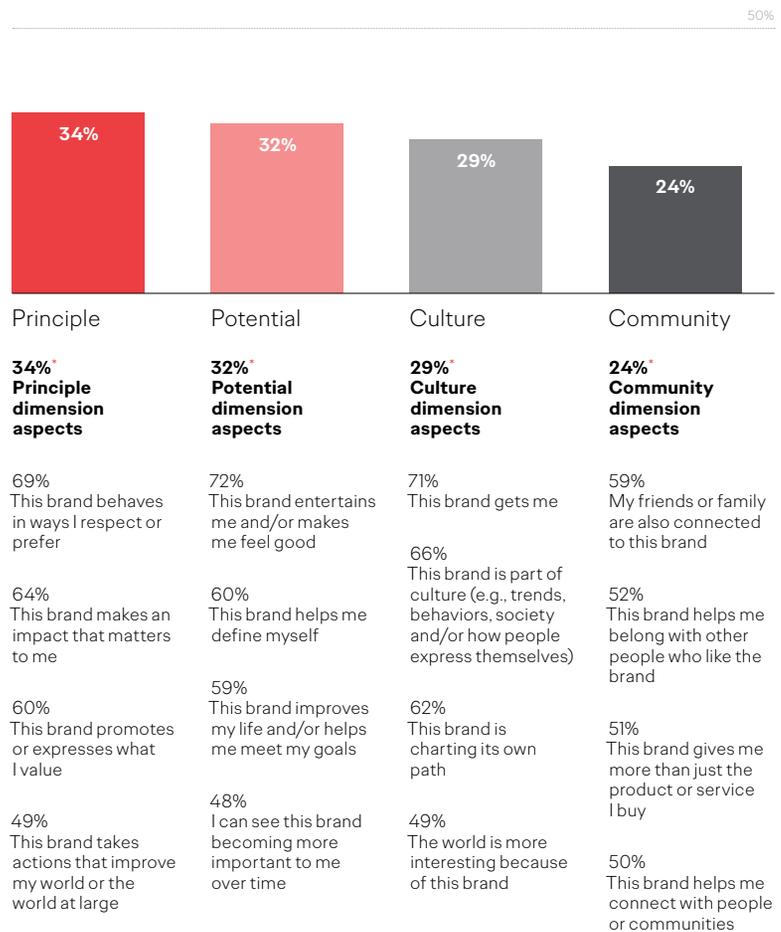
Retail

We asked 101 consumers in the UK with a favorite retail brand about their behaviors, perceptions, and potential value adds from that favorite brand. We found that:

- 45% purchase their favorite retail brand at least 75% of the time.
- 41% see their favorite retail brand as a cultural leader, and 34% see it as a reflector of culture.
- 46% would value recognition of how long they have been a customer.

In the UK, consumers place relatively less value on Community when it comes to their favorite retail brand, although all dimensions of loyalty are ranked fairly low for retail by UK consumers.

There is an opportunity to build a larger base of loyal customers, but the key will be focusing on brand experience and the demonstration of emotional and cultural alignment with your customers.



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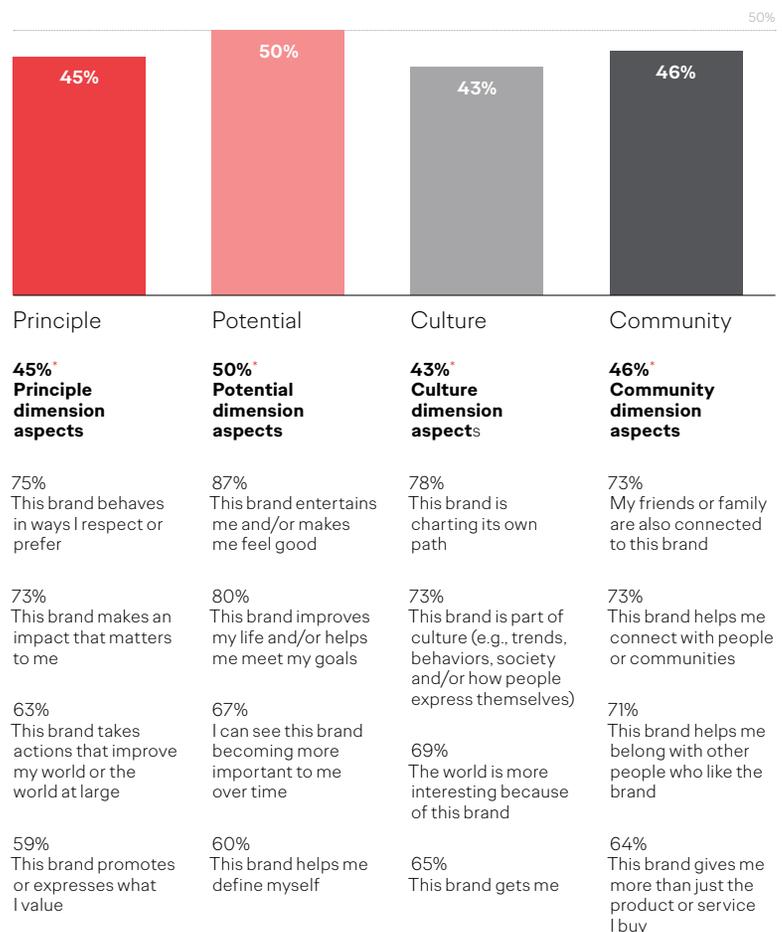


Technology

We asked 101 consumers in the UK with a favorite technology brand about their behaviors, perceptions, and potential value adds from that favorite brand. We found that:

- 49% purchase their favorite technology brand at least 75% of the time.
- 42% see their favorite technology brand as a cultural leader, and 40% see it as a reflector of culture.
- 55% would value early- or exclusive-access to new products, sales, etc.

In the UK, consumers place similar value on all four dimensions of Loyalty. They are also more apt to see their favorite technology brand as a cultural leader than customers in other categories. This stands at odds with their relatively tepid response to the Culture statements and suggests that Culture may be crucial only for a subset of customers. Technology has an intimate quality for consumers, and in the UK, those loyal to their technology brands want experiences that give them entertainment and good feelings. In fact, that is the most important factor, and it will be key to attracting the 50% of the market that is not already loyal to their technology brand.



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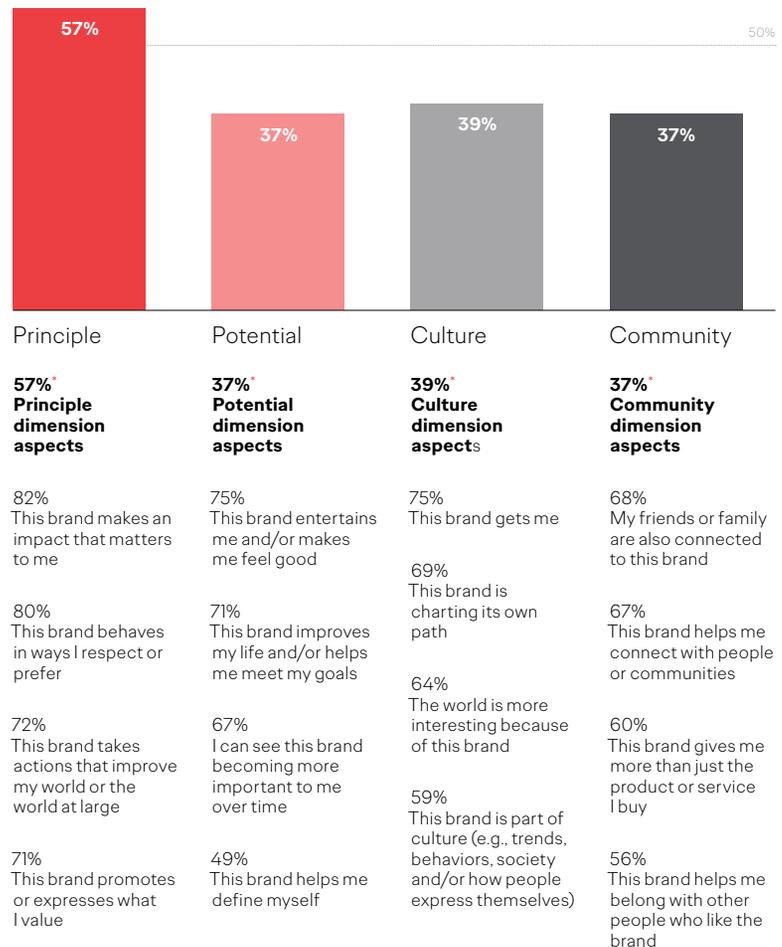


Travel and transportation

We asked 100 consumers in the UK with a favorite travel and transportation brand about their behaviors, perceptions, and potential value adds from that favorite brand. We found that:

- 50% purchase their favorite travel and transportation brand at least 75% of the time.
- 30% see their favorite travel and transportation brand as a cultural leader, and 33% see it as a reflector of culture.
- 66% would value early- or exclusive-access to new products, sales, etc.

In the UK, consumers place the most value on Principle when it comes to their favorite travel and transportation brand—but you shouldn't sleep on added value. That may be how loyal customers see brand impact manifested. However you express your brand, though, make certain you prioritize actions and behaviors rather than posturing. Do first and tell later. In so doing, you should be able to demonstrate that you and your customers are in sync.

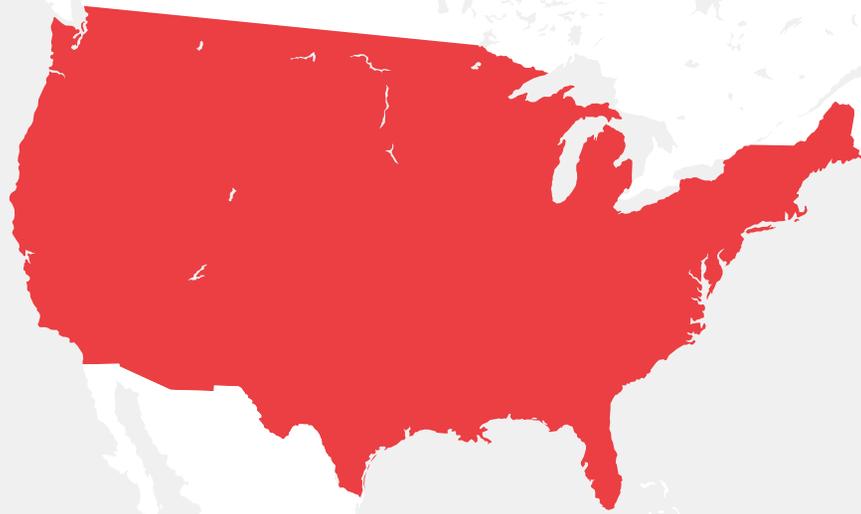


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COUNTRY-CATEGORY LOYALTY GUIDES

United States





Higher-income Americans are more likely to make repeat purchases from their favorite brand

Americans from higher-income households (earning \$100k or more, vs. \$50k-\$99k and less than \$50k) were more likely to purchase their favorite brand at least 75% of the time (60%* vs. 47% and 47%, respectively)

Half of American parents see their favorite brand as a cultural reflector

51%* of American parents see their favorite brand as a cultural reflector, compared with 38% of Americans without children in the household

Rural Americans are less drawn to brand-loyalty perks than urban and suburban Americans

Rural Americans were:

- Less likely to feel that exclusive-access offerings² add value to their favorite brand (47%[†] vs. 59% urban and 60% suburban)
- Less likely to feel that consistency-reward offerings³ add value to their favorite brand (52%[†] vs. 69% urban and 65% suburban)

In contrast with baby boomers, millennials prefer brands they share cultural and community alignment with

- Millennial Americans are more likely to agree with all four Culture dimension statements (52%[†]), compared to Gen Z (37%) and baby boomers (34%)
- Baby boomer Americans are less likely to agree with all four Community dimension statements (30%[†]), compared to millennials (46%) and Gen X (43%)

BEHAVIORAL SCIENCE FINDINGS

Openness to Experience

Personality trait



53% Low

47% High

Consumers high in openness prefer to try new things and may be more likely to try new brands.

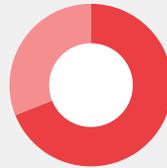
Consumers low in openness prefer routines and may purchase proven brands more often.

American consumers with high openness to experience are:

- More likely to agree with all four Principle dimension statements about their favorite brand (59%* vs. 47%)

Conscientiousness

Personality trait



31% Low

69% High

Consumers high in conscientiousness tend to be detail oriented and complete tasks; they may value consistency in brands.

Consumers low in conscientiousness have less detail orientation and may value different brand dimensions.

American consumers with high conscientiousness are:

- More likely to purchase their favorite brand at least 75% of the time (54%* vs. 42%)
- More likely to agree with all four Principle dimension statements about their favorite brand (56%[†] vs. 46%)
- More likely to agree with all four Culture dimension statements about their favorite brand (47%[†] vs. 34%)
- Less likely to feel that exclusive-access offerings² add value to their favorite brand (54%[†] vs. 65%)
- More likely to feel that consistency-reward offerings³ add value to their favorite brand than those with promotion focus (67%* vs. 57%)

Motivational Focus

Risk tolerance



31% Prevention

46% Neutral

23% Promotion

Consumers with a promotion focus tend to go for gains and may be more likely to try new brands.

Consumers with a prevention focus tend to avoid risks and may stick with trusted brands.

American consumers with a promotion focus are more likely to:

- Agree with all four Culture dimension statements, compared to those with a prevention focus (50%* vs. 36%)
- See their favorite brand as a cultural reflector, compared to those with a prevention focus (50%* vs. 33%)

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 3 Recognizing how long I've been a customer; Rewarding me for consistent daily use/logins

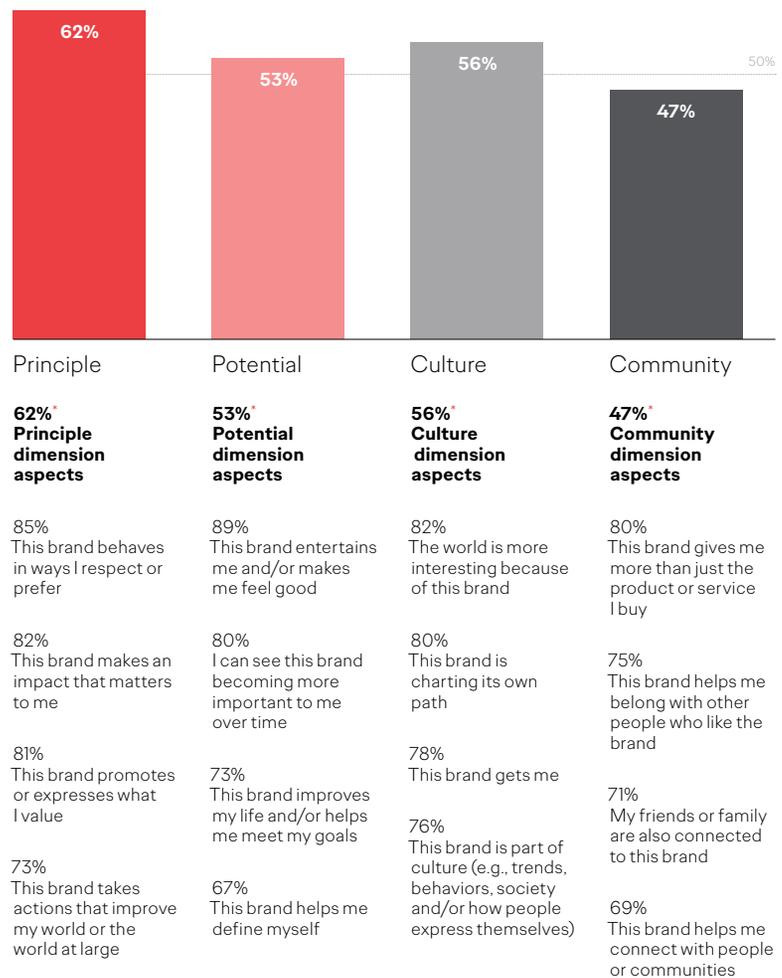


Accommodations and entertainment

We asked 101 consumers in the US with a favorite accommodations and entertainment brand about their behaviors, perceptions, and potential value adds from that favorite brand. We found that:

- 48% purchase their favorite accommodations and entertainment brand at least 75% of the time.
- 35% see their favorite accommodations and entertainment brand as a cultural leader, and 52% see it as a reflector of culture.
- 55% would value personalization to meet their needs.

In the US, consumers place the most value on Principle when it comes to their favorite accommodations and entertainment brand. Despite that, the most important factor for American customers is the ability of their accommodations and entertainment brand to entertain them or make them feel good while behaving in a way those customers respect. Loyalty rates are relatively low, giving ample opportunity to brands eager to capture loyal customers. One key factor will be the ability to make the world a more interesting place. This implies that accommodations and entertainment brands in the US should look to their impact beyond the individual customer in building the framework for loyalty.



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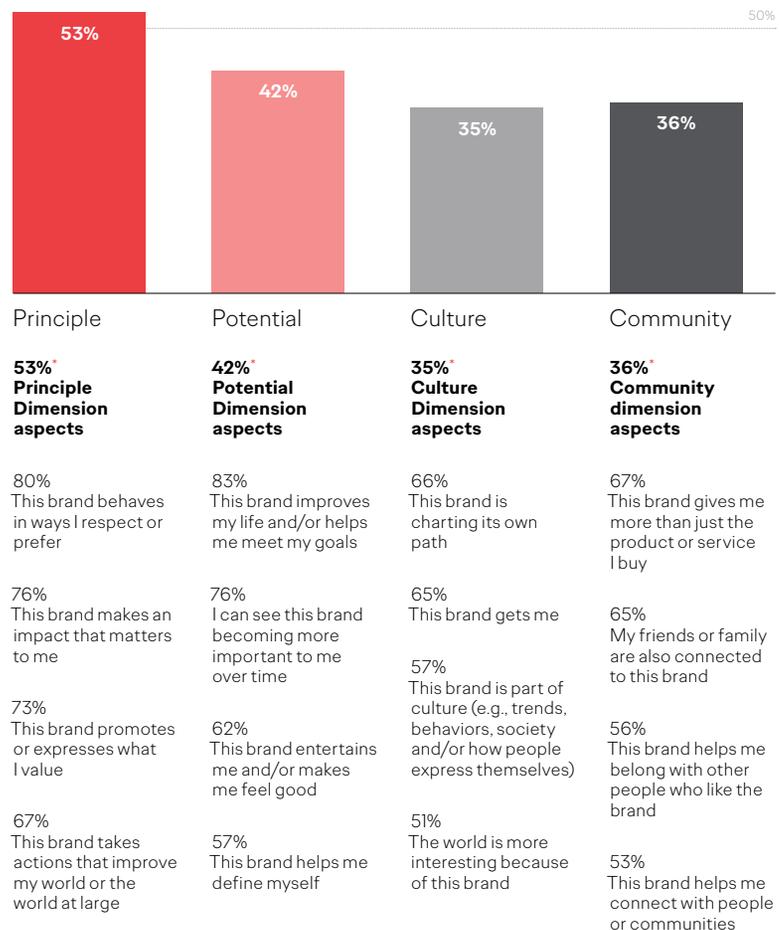


Financial services

We asked 101 consumers in the US with a favorite financial services brand about their behaviors, perceptions, and potential value adds from that favorite brand. We found that:

- 52% purchase their favorite financial services brand at least 75% of the time.
- 31% see their favorite financial services brand as a cultural leader, and 39% see it as a reflector of culture.
- 44% would value recognition of how long they have been a customer.

In the US, consumers place the most value on Principle when it comes to their favorite financial services brand, but that is not the only factor they're evaluating in deciding where to place their loyalty. These customers want their financial services brands to attend to the mechanics of their lives, improving things for them and making a positive impact in ways that they value.



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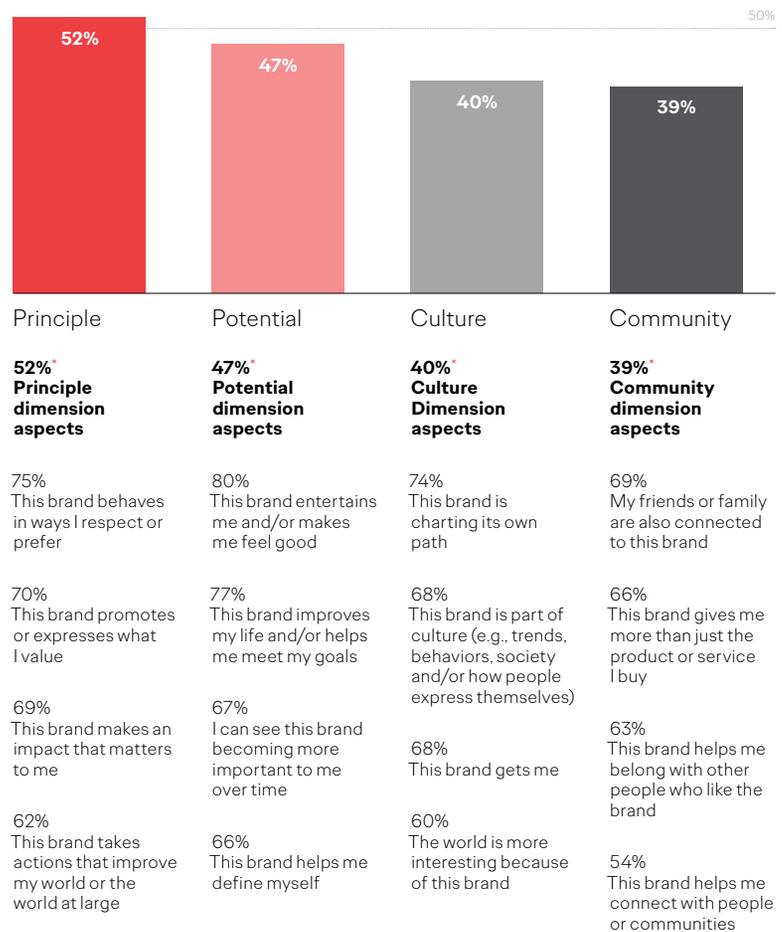
Retail

We asked 101 consumers in the US with a favorite retail brand about their behaviors, perceptions, and potential value adds from that favorite brand. We found that:

- 50% purchase their favorite retail brand at least 75% of the time.
- 37% see their favorite retail brand as a cultural leader, and 43% see it as a reflector of culture.
- 45% would value recognition of how long they have been a customer.

In the US, consumers place the most value on Principle and Potential when it comes to their favorite retail brand.

Demonstrating and expressing shared values is likely to bind further customers to your brand, and there is ample opportunity to do so in this category. Providing a positive brand experiences and improving customers' lives are vital to loyal customers in retail in retail.



Data excerpted from Ogilvy's Global Loyalty Study with field partner Big Village's International CARAVAN survey, live May 24 - May 30, 2024.

* Indicates a statistically significantly higher percentage

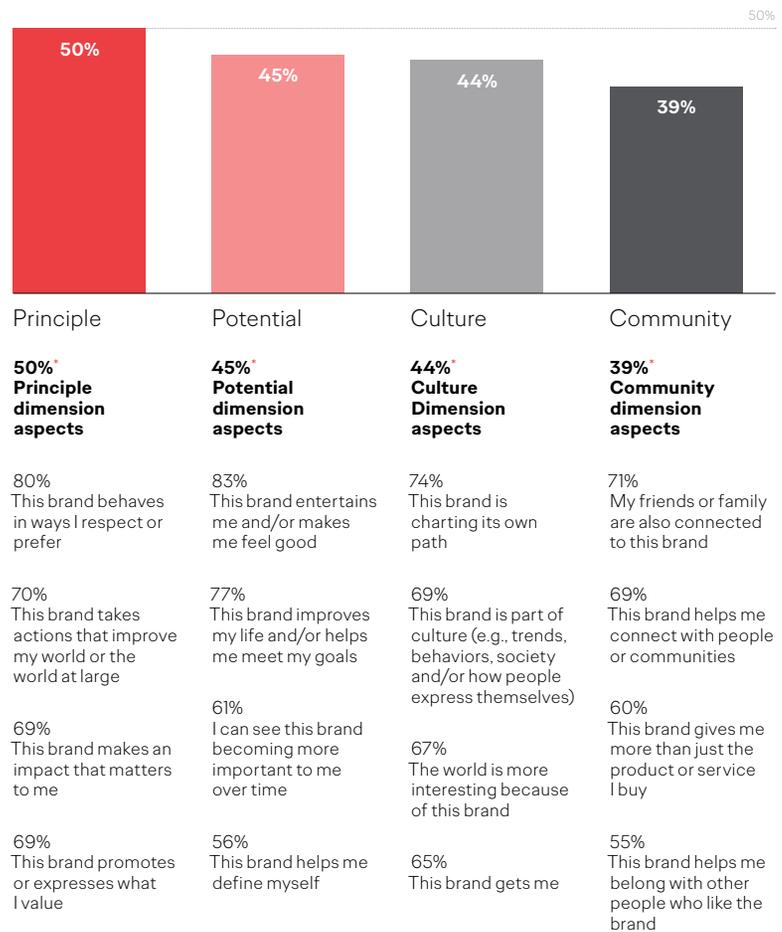


Technology

We asked 101 consumers in the US with a favorite technology brand about their behaviors, perceptions, and potential value adds from that favorite brand. We found that:

- 45% purchase their favorite technology brand at least 75% of the time.
- 41% see their favorite technology brand as a cultural leader, and 37% see it as a reflector of culture.
- 55% would value at least one kind of data offering like controlling/profiting from how their personal data is used or simplifying their digital life and how their personal data is stored.

In the US, consumers place the least value on Community when it comes to their favorite technology brand. This stands in contrast to Principle, with Potential and Culture falling somewhere in between. Loyal customers also demonstrate a slight preference for cultural leadership from their technology brand, and when that notion is combined with the centrality of Principle, it is easy to conclude that people find identity expression through these brands. That’s why brand differentiation is important here. All that said, don’t ignore the basics of what a technology brand must do for its loyal customers: entertain them and improve their lives, especially when it comes to simplifying the confusing digital world for them. You can boil this data down to one phrase when serving the loyal Technology customer in America: be on the consumer’s side.



Data excerpted from Ogilvy's Global Loyalty Study with field partner Big Village's International CARAVAN survey, live May 24 - May 30, 2024.

* Indicates a statistically significantly higher percentage



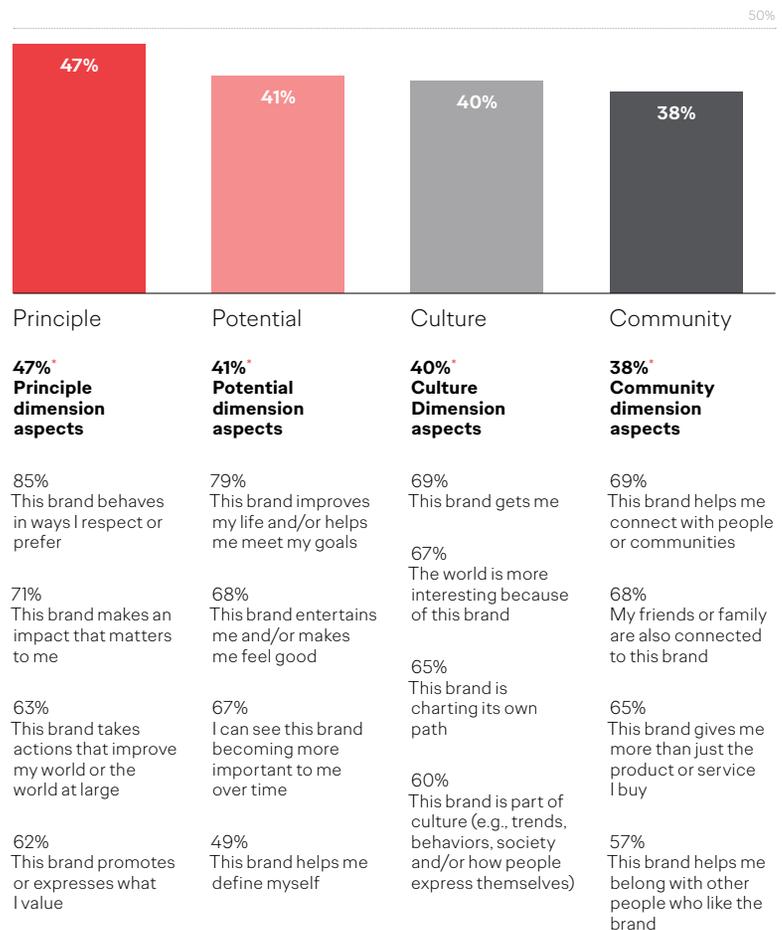
Travel and transportation

We asked 100 consumers in the US with a favorite travel and transportation brand about their behaviors, perceptions, and potential value adds from that favorite brand. We found that:

- 59% purchase their favorite travel and transportation brand at least 75% of the time.
- 37% see their favorite travel and transportation brand as a cultural leader, and 40% see it as a reflector of culture.
- 67% would value early- or exclusive-access to new products, sales, etc.

In the US, consumers may place a bit more value on Principle when it comes to their favorite travel and transportation brand, although not much more than on Community, Culture, and Potential. They're also relatively loyal.

Unsurprisingly for the category, customers want improved lives as a result of their loyalty to these brands, but they are also looking for what they consider proper brand behavior.



50%

Data excerpted from Ogilvy's Global Loyalty Study with field partner Big Village's International CARAVAN survey, live May 24 - May 30, 2024.

* Indicates a statistically significantly higher percentage

ABOUT US

Ogilvy One

...creates brand, business, and customer value by designing personal, data-driven relationships at the intersection of creativity and technology.

ONE GOAL

Creating impactful relationships by design

ONE RELATIONSHIP

Most customers say brands don't get them. So brands need to build a new kind of relationship with their customers.

ONE BELIEF

One led by creativity. One powered by data. One supercharged by AI. And one built for an audience of one.

ONE TEAM

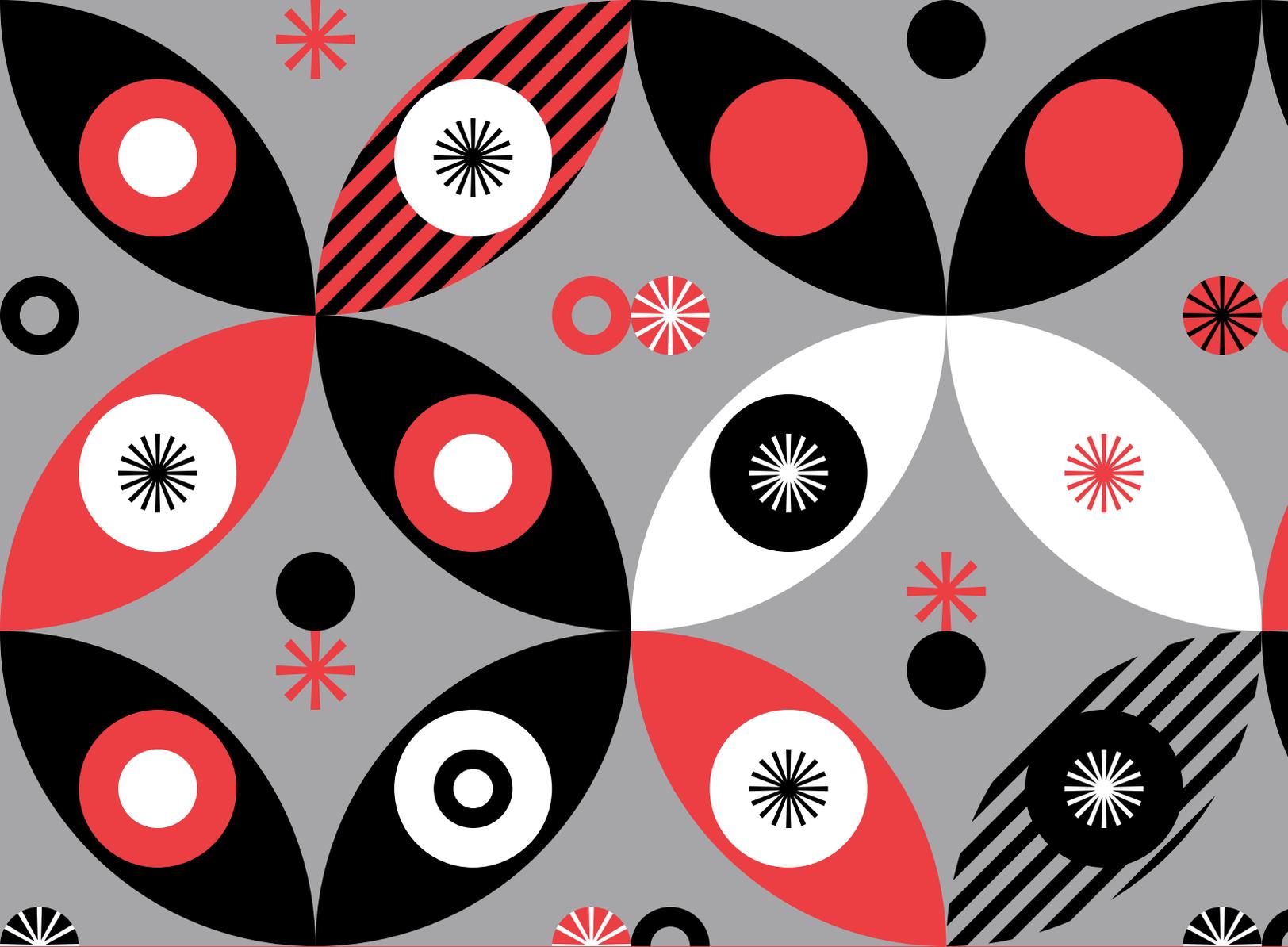
We are thousands of creative people, each bringing our own ideas, skills, experiences and superpowers. We collaborate borderlessly, across time zones, disciplines, cultures and beliefs.

CONTACT

ogilvyone@ogilvy.com

VISIT US AT

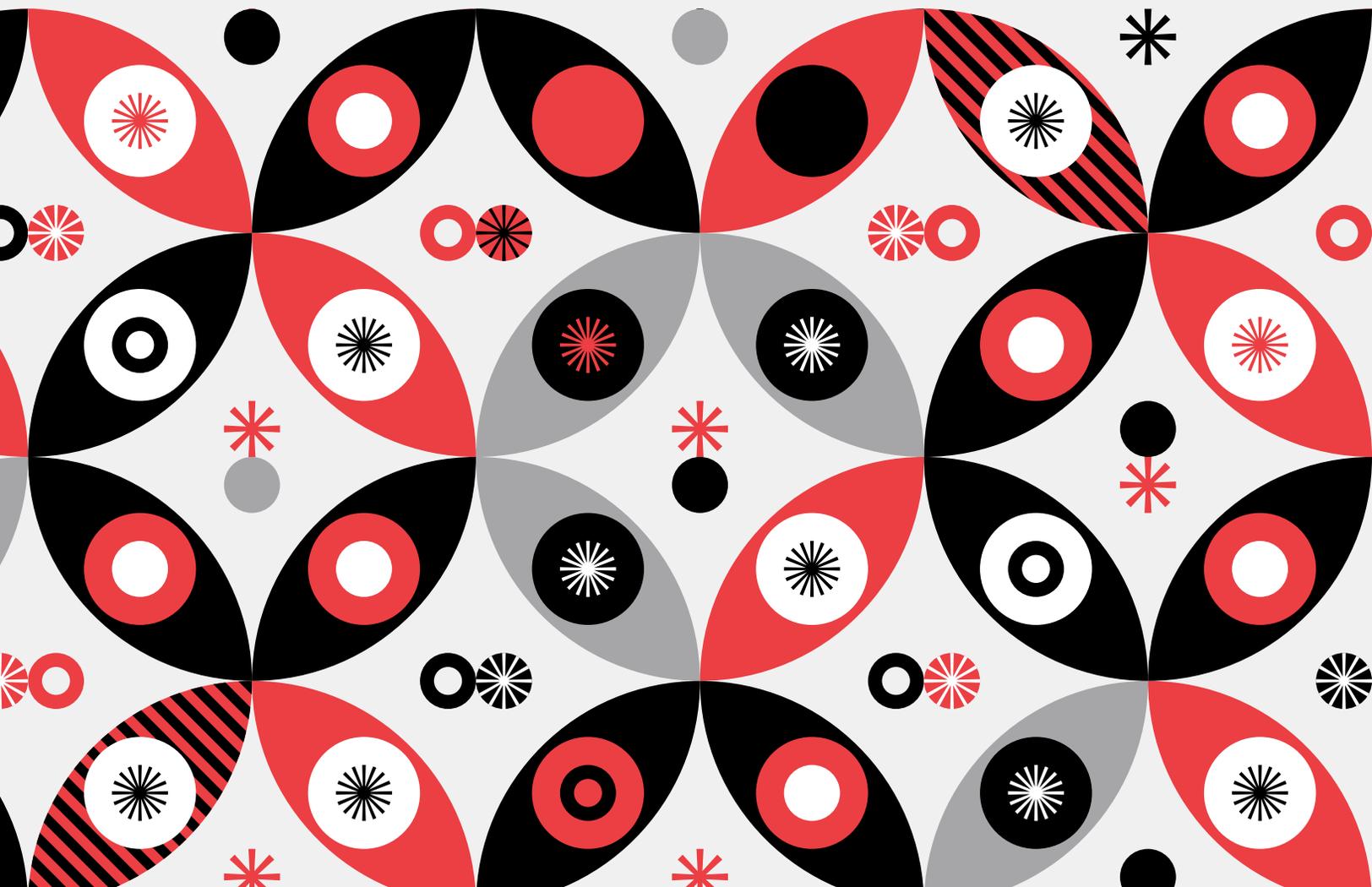
www.ogilvyone.com



Ogilvy One

THE FOUR DIMENSIONS
OF LOYALTY

Loyalty research appendices



APPENDIX I: AUDIENCE PROFILE

Audience Profile N=3,532

TABLE 1

TOTAL RESPONDENTS DISTRIBUTION

	Global total	Financial services	Tech	Travel and Transport	Retail	Accommodations and Entertainment
Global total	3,532	707	707	705	708	705
Brazil	505	101	101	101	101	101
China	505	101	101	101	101	101
Germany	504	101	101	101	101	100
India	505	101	101	101	101	101
Mexico	505	101	101	101	102	100
United Kingdom	504	101	101	100	101	101
United States	504	101	101	100	101	101

Data for this study were collected via the CARAVAN survey, conducted by Big Village among a sample of 3,532 adults ages 18-64 in one of seven countries who have a favorite brand in at least one of the listed categories within the survey (505 in Brazil, 505 in China, 504 in Germany, 505 in India, 505 in Mexico, 504 in the UK, and 504 in the US). This survey was live on May 24-30, 2024, in the US and May 28-June 3, 2024, in Brazil, China, Germany, India, Mexico, and the UK.

TABLE 2

TOTAL RESPONDENTS GENDER

	N=
Women	1,746
Men	1,781

TABLE 3

TOTAL RESPONDENTS URBANICITY

	N=
Urban	2,340
suburban	786
Rural	406

TABLE 4

TOTAL RESPONDENTS WITH CHILDREN UNDER AGE 18 LIVING IN HOUSEHOLD

	N=
Parent	1,854
Non-Parent	1,678

TABLE 5

TOTAL RESPONDENTS GENERATION

	N=
Gen Z (18-27)	793
Millennial (28-43)	1,468
Gen X (44-59)	1,007
Baby boomer (60-64)	264

APPENDIX II: GLOBAL TOTALS AND DIFFERENCES ACROSS COUNTRIES

Brand Principle

- A. Promotes or expresses what I value
- B. Behaves in ways I respect or prefer
- C. Makes an impact that matters to me
- D. Takes actions that improve my world or the world at large

TABLE 6

AGREEMENT WITH ALL FOUR BRAND PRINCIPLE STATEMENTS BY COUNTRY

Global total	61%
Brazil	76%*
China	64%
Germany	43%‡
India	80%*
Mexico	67%
United Kingdom	46%‡
United States	53%

To what extent do you agree or disagree with each of the following statements when it comes to your favorite [CATEGORY] brand?

Brand Potential

- A. I can see this brand becoming more important to me over time
- B. This brand improves my life and/or helps me meet my goals
- C. This brand helps me define myself
- D. This brand entertains me and/or makes me feel good

TABLE 7

AGREEMENT WITH ALL FOUR BRAND POTENTIAL STATEMENTS BY COUNTRY

Global total	55%
Brazil	64%
China	62%
Germany	38%‡
India	73%*
Mexico	64%
United Kingdom	37%‡
United States	45%

To what extent do you agree or disagree with each of the following statements when it comes to your favorite [CATEGORY] brand?

Brand Culture

- A. This brand is part of culture (e.g., trends, behaviors, society and/or how people express themselves)
- B. This brand is charting its own path
- C. This brand gets me
- D. The world is more interesting because of this brand

TABLE 8

AGREEMENT WITH ALL FOUR BRAND CULTURE STATEMENTS BY COUNTRY

Global total	50%
Brazil	62%
China	58%
Germany	35%‡
India	63%
Mexico	57%
United Kingdom	34%‡
United States	43%

To what extent do you agree or disagree with each of the following statements when it comes to your favorite [CATEGORY] brand?

Brand Community

- A. My friends or family are also connected to this brand
- B. This brand gives me more than just the product or service I buy
- C. This brand helps me connect with people or communities
- D. This brand helps me belong with other people who like the brand

TABLE 9

AGREEMENT WITH ALL FOUR BRAND COMMUNITY STATEMENTS BY COUNTRY

Global total	50%
Brazil	63%
China	60%
Germany	32%‡
India	67%
Mexico	53%
United Kingdom	33%‡
United States	40%

To what extent do you agree or disagree with each of the following statements when it comes to your favorite [CATEGORY] brand?

Loyalty dimensions –individual statements

TABLE 10

PRINCIPLE DIMENSION INDIVIDUAL STATEMENTS, GLOBAL TOTAL	NET Agree N=3,532
Behaves in ways I respect or prefer	85%
Makes an impact that matters to me	82%
Promotes or expresses what I value	80%
Takes actions that improve my world or the world at large	75%

TABLE 11

PROMOTION DIMENSION INDIVIDUAL STATEMENTS, GLOBAL TOTAL	NET Agree N=3,532
This brand entertains me and/or makes me feel good	83%
This brand improves my life and/or helps me meet my goals	81%
I can see this brand becoming more important to me over time	78%
This brand helps me define myself	68%

TABLE 12

CULTURE DIMENSION INDIVIDUAL STATEMENTS, GLOBAL TOTAL	NET Agree N=3,532
This brand is charting its own path	79%
This brand gets me	76%
This brand is part of culture (e.g., trends, behaviors, society and/or how people express themselves)	74%
The world is more interesting because of this brand	69%

TABLE 13

COMMUNITY DIMENSION INDIVIDUAL STATEMENTS, GLOBAL TOTAL	NET Agree N=3,532
My friends or family are also connected to this brand	76%
This brand gives me more than just the product or service I buy	75%
This brand helps me connect with people or communities	71%
This brand helps me belong with other people who like the brand	70%

To what extent do you agree or disagree with each of the following statements when it comes to your favorite [CATEGORY] brand?

Brand as cultural leader/reflector

Cultural leader: My favorite brand sets the tone for what is popular in cultural conversations

Cultural reflector: My favorite brand reinterprets what is popular already through its point of view

Not applicable: My favorite brand does not relate to any trends, behaviors, society or how people express themselves

TABLE 14

BRAND AS CULTURAL LEADER VS. REFLECTOR BY COUNTRY

	Leader	Equal	Reflector	N/A
Global total	34%	4%	47%	15%
Brazil	35%	3%	55%	8%
China	33%	4%	58%	5%
Germany	29%	4%	42%	25%*
India	37%	6%	49%	9%
Mexico	32%	3%	50%	15%
United Kingdom	39%	3%	32%†	25%*
United States	36%	3%	42%	19%

How would you describe how your favorite [CATEGORY] brand relates to what is popular in culture? Please think of culture as trends, behaviors, society and/or how people express themselves. Using the sliding scale below, indicate how close you believe your favorite brand is to being either a Cultural leader or a Cultural reflector.

General brand value adds

Access: Giving me exclusive access to limited-edition products; Giving me early access to new products, sales, etc.; Providing exclusive experiences or exclusive access to public experiences

Data: Simplifying my digital life and how my personal data is stored; Letting me control and/or profit from how my data is used

Consistency: Recognizing how long I've been a customer; Rewarding me for consistent daily use/logins

Personalization: Personalizing the product/experience to my needs

AI Assistant: Providing an AI assistant

TABLE 15

GENERAL BRAND VALUE ADDS BY COUNTRY

	Access	Consist.	Data	Pers.	AI
Global total	63%	54%	48%	40%	16%
Brazil	64%*	59%	54%*	40%	16%
China	72%*	37%‡	53%*	50%*	30%*
Germany	54%‡	57%	40%‡	37%‡	12%
India	73%*	50%	52%*	42%	24%
Mexico	65%*	45%	55%*	39%	12%
United Kingdom	58%‡	62%	39%‡	32%‡	8%
United States	57%‡	64%	43%‡	39%	10%

Now think about your favorite brand generally, or in any category. Which of the following, if any, adds or would add the most value for you?

Purchase consistency

TABLE 16

PURCHASE CONSISTENCY BY COUNTRY, THOSE WHO PURCHASE OR CHOOSE FAVORITE BRAND AT LEAST 75% OF THE TIME

Global total	55%
Brazil	66%*
China	49%
Germany	47%‡
India	66%*
Mexico	59%
United Kingdom	44%‡
United States	50%

When purchasing or doing business/selecting services within the [CATEGORY] category, about how often do you ultimately purchase/select your favorite brand over other brands? On the sliding scale below, please indicate what percent of the time you purchase/select your favorite brand over others. Your best estimate is fine.

Regulatory focus across countries

TABLE 17

REGULATORY FOCUS ACROSS COUNTRIES

	Prevention	Neutral	Promotion
Global total	28%	44%	28%
Brazil	25%	44%	31%
China	27%	48%	25%
Germany	26%	43%	31%
India	22%	49%	29%
Mexico	28%	38%	34%
United Kingdom	37%	43%	20%
United States	31%	46%	23%

Now we are interested in learning a little bit more about you and your personality and preferences. Please choose the one statement among each pair that is most like you. [PREVENTION COMBINATION] "When I think about my future, I more often think of how to avoid going wrong" AND "It's more important to get it right and make a safe decision than to risk making mistakes" [PROMOTION COMBINATION] "When I think about my future, I more often think about big new goals to go for" AND "I really go for it even if that means risking mistakes. That's how you achieve big goals" [NEUTRAL COMBINATION] One statement from Prevention combination AND one statement from Promotion combination

Conscientiousness across countries

TABLE 18

CONSCIENTIOUSNESS ACROSS COUNTRIES

	Low	High
Global total	29%	71%
Brazil	17%	83%*
China	25%	75%
Germany	41%*	59%
India	27%	73%
Mexico	27%	73%
United Kingdom	33%	67%
United States	31%	69%

Now we are interested in learning a little bit more about you and your personality and preferences. Please choose the one statement among each pair that is most like you.
 [LOW] I like spur-of-the-moment decisions; I don't like to be always tied down by commitments/
 [HIGH] I'm a planner, thinking things through in advance

Openness to experience across countries

TABLE 19

OPENNESS TO EXPERIENCE ACROSS COUNTRIES

	Low	High
Global total	48%	52%
Brazil	47%	53%
China	51%	49%
Germany	55%	45%
India	38%	62%*
Mexico	40%	60%*
United Kingdom	49%	51%
United States	53%	47%

Now we are interested in learning a little bit more about you and your personality and preferences. Please choose the one statement among each pair that is most like you.
 [LOW] I generally like the comfort of what I know works for me, like going back to the same restaurants or vacation destinations/
 [HIGH] I generally like lots of variety, whether in finding new foods or restaurants, or traveling to new countries

APPENDIX III: RESPONDING CATEGORY DIFFERENCES

Brand Principle

- A. Promotes or expresses what I value
- B. Behaves in ways I respect or prefer
- C. Makes an impact that matters to me
- D. Takes actions that improve my world or the world at large

TABLE 20

AGREEMENT WITH ALL FOUR BRAND PRINCIPLE STATEMENTS BY CATEGORY

Global total	61%
Financial services	63%
Technology	58%
Travel and transportation	64%
Retail	56%
Accommodations and entertainment	65%

To what extent do you agree or disagree with each of the following statements when it comes to your favorite [CATEGORY] brand?

Brand Potential

- A. I can see this brand becoming more important to me over time
- B. This brand improves my life and/or helps me meet my goals
- C. This brand helps me define myself
- D. This brand entertains me and/or makes me feel good

TABLE 21

AGREEMENT WITH ALL FOUR BRAND POTENTIAL STATEMENTS BY CATEGORY

Global total	55%
Financial services	55%
Technology	54%
Travel and transportation	55%
Retail	51%
Accommodations and entertainment	58%

To what extent do you agree or disagree with each of the following statements when it comes to your favorite [CATEGORY] brand?

Brand Culture

- A. This brand is part of culture (e.g., trends, behaviors, society and/or how people express themselves)
- B. This brand is charting its own path
- C. This brand gets me
- D. The world is more interesting because of this brand

TABLE 22

AGREEMENT WITH ALL FOUR BRAND CULTURE STATEMENTS BY CATEGORY

Global total	50%
Financial services	49%
Technology	49%
Travel and transportation	51%
Retail	45%
Accommodations and entertainment	57%*

To what extent do you agree or disagree with each of the following statements when it comes to your favorite [CATEGORY] brand?

Brand Community

- A. My friends or family are also connected to this brand
- B. This brand gives me more than just the product or service I buy
- C. This brand helps me connect with people or communities
- D. This brand helps me belong with other people who like the brand

TABLE 23

AGREEMENT WITH ALL FOUR BRAND COMMUNITY STATEMENTS BY CATEGORY

Global total	50%
Financial services	47%
Technology	49%
Travel and transportation	53%
Retail	43%
Accommodations and entertainment	57%

To what extent do you agree or disagree with each of the following statements when it comes to your favorite [CATEGORY] brand?

Brand as cultural leader/reflector

Cultural leader: My favorite brand sets the tone for what is popular in cultural conversations

Cultural reflector: My favorite brand reinterprets what is popular already through its point of view

Not applicable: My favorite brand does not relate to any trends, behaviors, society or how people express themselves

TABLE 24

BRAND AS CULTURAL LEADER VS. REFLECTOR BY CATEGORY

	Leader	Equal	Reflector	N/A
Global total	34%	4%	47%	15%
Financial services	31%	4%	45%	21%*
Technology	38%	5%	44%	14%
Travel and transportation	32%	3%	49%	16%
Retail	36%	4%	46%	15%
Accommodations and entertainment	36%	3%	51%	10%‡

How would you describe how your favorite [CATEGORY] brand relates to what is popular with culture? Please think of culture as trends, behaviors, society and/or how people express themselves. Using the sliding scale below, indicate how close you believe your favorite brand is to being either a Cultural leader or a Cultural reflector.

General brand value adds

Access: Giving me exclusive access to limited-edition products; Giving me early access to new products, sales, etc.; Providing exclusive experiences or exclusive access to public experiences

Data: Simplifying my digital life and how my personal data is stored; Letting me control and/or profit from how my data is used

Consistency: Recognizing how long I've been a customer; Rewarding me for consistent daily use/logins

Personalization: Personalizing the product/experience to my needs

AI Assistant: Providing an AI assistant

TABLE 25

GENERAL BRAND VALUE ADDS BY CATEGORY

	Access	Consist.	Data	Pers.	AI
Global total	63%	54%	48%	40%	16%
Financial services	57%	55%	55%*	41%	18%
Technology	55%	43%‡	57%*	38%	20%
Travel and transportation	69%*	57%	45%	35%	14%
Retail	63%	56%	36%‡	39%	11%
Accommodations and entertainment	72%*	57%	46%	46%	17%

Now think about your favorite brand generally, or in any category. Which of the following, if any, adds or would add the most value for you?

Purchase consistency

TABLE 26

PURCHASE CONSISTENCY BY CATEGORY, THOSE WHO PURCHASE OR CHOOSE FAVORITE BRAND AT LEAST 75% OF THE TIME

	Purchase or choose favorite brand at least 75% of the time
Global total	55%
Financial services	56%
Technology	54%
Travel and transportation	56%
Retail	51%
Accommodations and entertainment	57%

When purchasing or doing business/ selecting services within the [CATEGORY] category, about how often do you ultimately purchase/select your favorite brand over other brands? On the sliding scale below, please indicate what percent of the time you purchase/select your favorite brand over others. Your best estimate is fine.

APPENDIX IV: ADDITIONAL DIFFERENCES

Consistent purchasers

GLOBAL TOTAL DIFFERENCES

Consistent purchasers (those who purchase their favorite brand 75% or more of the time) are:

- More likely to agree with all four Principle statements than those with lower purchase rates (70%* vs. 51%)
- More likely to agree with all four Potential statements than those with lower purchase rates (63%* vs. 44%)
- More likely to agree with all four Culture statements than those with lower purchase rates (59%* vs. 40%)
- More likely to agree with all four Community statements than those with lower purchase rates (57%* vs. 41%)
- More likely to identify their favorite brand as a reflector, compared to those purchasing less consistently (56%* vs. 36%)

Those choosing their favorite brand less than 75% of the time are more likely to identify their favorite brand as a leader, compared to those purchasing more consistently (41%* vs. 29%)

When purchasing or doing business/selecting services within the [CATEGORY] category, about how often do you ultimately purchase/select your favorite brand over other brands? On the sliding scale below, please indicate what percent of the time you purchase/select your favorite brand over others. Your best estimate is fine.

Urbanicity

GLOBAL TOTAL DIFFERENCES

Urban consumers are more likely to:

- Agree with all four Principle statements (67%*) vs. suburban (50%) or rural consumers (53%)
- Agree with all four Potential statements (61%*) vs. suburban (41%) or rural consumers (44%)
- Agree with all four Culture statements (56%*) vs. suburban (38%) or rural consumers (40%)
- Agree with all four Community statements (56%*) vs. suburban (37%) or rural consumers (37%)
- Value a data offering (52%*) vs. suburban (41%) and rural (40%) consumers
- Value an access offering (66%*) vs. suburban (61%) and rural (55%) consumers
- Value an AI assistant (19%*) vs. suburban (9%) and rural (11%) consumers
- Choose their favorite brand at least 75% of the time (58%*) vs. those in suburban (49%) or rural consumers (48%)

Suburban respondents:

- Are more likely (62%*) than urban (51%) and rural (53%) consumers to value consistency-reward offerings
- Are more likely (21%*) than urban (12%) consumers to find the Cultural Leader/Cultural reflector concepts not applicable

Rural respondents:

- Are less likely to identify their favorite brand as a reflector (36%†) vs. urban (49%) and suburban consumers (45%)
- Are more likely (25%*) than urban (12%) consumers to find the Cultural Leader/Cultural reflector concepts not applicable

Generation

GLOBAL TOTAL DIFFERENCES

Gen Z and millennials

- Gen Z (39%*) and millennials (35%*) are more likely to identify their favorite brand as a cultural leader than Gen X (30%) or baby boomers (28%)
- Gen Z (66%*) and millennials (67%*) are more likely to value access than Gen X (58%) or baby boomers (52%)

Millennials

- Millennials (67%*) are more likely to agree with all four Principle statements than Gen Z (54%), Gen X (60%), or baby boomers (54%)
- Millennials (56%*) are more likely to agree with all four Culture statements than Gen Z (43%), Gen X (49%), or baby boomers (42%)
- Millennials (60%*) are more likely to agree with all four Potential statements than Gen Z (51%), Gen X (53%), or baby boomers (42%)
- Millennials (57%*) are more likely to agree with all four Community statements than Gen Z (42%), Gen X (48%), or baby boomers (38%)
- Millennials (19%*) are more likely to value an AI assistant than Gen Z (16%), Gen X (13%), or baby boomers (9%)

Gen X and baby boomers

- Gen X (57%*) and baby boomers (60%*) are more likely to value consistency than Gen Z (50%) or millennials (52%)
- Baby boomers (29%*) are more likely than other generations to find the Cultural Leader/Cultural reflector concepts not applicable (Gen X 19%, millennials 11%, Gen Z 14%)

Parents

GLOBAL TOTAL DIFFERENCES

Among parents with children under age 18 in the household:

- 69%* agree with all four Principle statements vs. non-parents (53%)
- 63%* agree with all four Potential statements vs. non-parents (45%)
- 58%* agree with all four Culture statements vs. non-parents (42%)
- 59%* agree with all four Community statements vs. non-parents (40%)
- 51%* are likely to identify their favorite brand as a cultural reflector vs. non-parents (42%)
- 68%* value access offerings vs. non-parents (58%)

Openness to experience

GLOBAL TOTAL DIFFERENCES

- Principle is especially important to those with high openness to experience vs. those with low openness (66%* agreeing with all four statements vs. 56%)
- Potential is especially important to those with high openness to experience vs. those with low openness (60%* agreeing with all four statements vs. 49%)
- Culture is especially important to those with high openness to experience vs. those with low openness (55%* agreeing with all four statements vs. 45%)
- Community is especially important to those with high openness to experience vs. those with low openness (54%* agreeing with all four statements vs. 45%)
- Those with high openness to experience are more likely to perceive access as adding value (67%* vs. 59% of those with low openness)

Now we are interested in learning a little bit more about you and your personality and preferences. Please choose the one statement among each pair that is most like you.
 [HIGH] I generally like lots of variety, whether in finding new foods or restaurants, or traveling to new countries
 [LOW] I generally like the comfort of what I know works for me, like going back to the same restaurants or vacation destinations

Regulatory focus

GLOBAL TOTAL DIFFERENCES

Promotion focus

- Principle is especially important to those with a promotion focus (66%* agreeing with all four statements vs. 61% neutral and 56% prevention)
- Potential is especially important to those with a promotion focus (60%* agreeing with all four statements vs. 56% neutral and 48% prevention)
- Culture is especially important to those with a promotion focus (55%* agreeing with all four statements vs. 51% neutral and 44% prevention)

Promotion/neutral focus

- Community is especially important to those with a promotion or neutral focus (54%* and 52%*, respectively, agreeing with all four statements vs. 42% prevention)
- Those with regulatory focus on promotion (66%*) or neutral (66%*) are more likely than those with regulatory focus on prevention (57%) to see access as a value add
- AI assistants are more likely to be identified as valuable to consumers with regulatory focus on promotion (17%*) and neutral (18%*), compared to prevention (11%)

Prevention focus

- Consistency was more likely to be identified as valuable to consumers with regulatory focus on prevention (58%*), compared to promotion (51%) and neutral (52%)

Now we are interested in learning a little bit more about you and your personality and preferences. Please choose the one statement among each pair that is most like you.
 [PREVENTION] *When I think about my future, I more often think of how to avoid going wrong AND it's more important to get it right and make a safe decision than to risk making mistakes*
 [NEUTRAL] *Mix of one statement from promotion and one statement from Prevention*
 [PROMOTION] *When I think about my future, I more often think about big new goals to go for AND I really go for it even if that means risking mistakes. That's how you achieve big goals*

Conscientiousness

GLOBAL TOTAL DIFFERENCES

- Those with high conscientiousness are more likely to agree with all four Principle statements than those with love (64%* vs. 55%)
- Those with high conscientiousness are more likely to agree with all four Potential statements than those with love (57%* vs. 49%)
- Those with high conscientiousness are more likely to agree with all four Community statements than those with love (52%* vs. 45%)
- Those with high conscientiousness are more likely to agree with all four Culture statements than those with love (53%* vs. 44%)
- Those with high conscientiousness are more likely than those with love Conscientiousness to purchase their favorite brand at least 3 out of 4 times (57%* vs. 47%)

Now we are interested in learning a little bit more about you and your personality and preferences. Please choose the one statement among each pair that is most like you.
 [HIGH] *I'm a planner, thinking things through in advance*
 [LOW] *I like spur-of-the-moment decisions; I don't like to be always tied down by commitments*