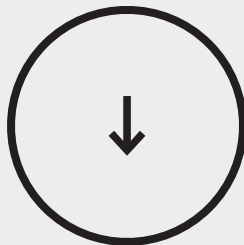
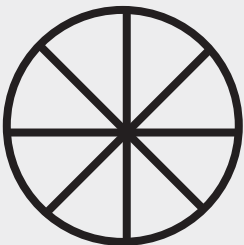
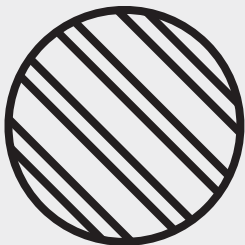
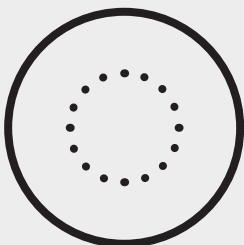
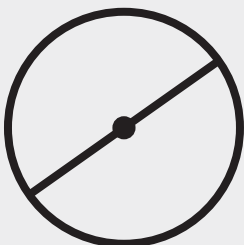
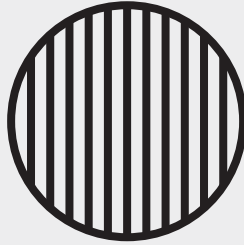
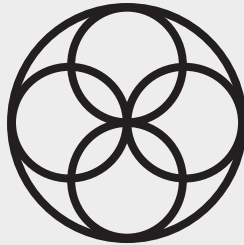
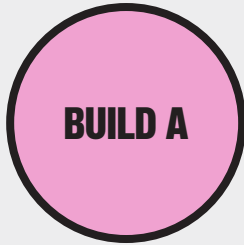
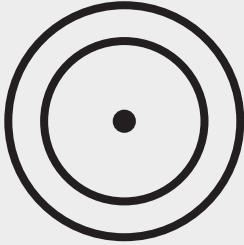
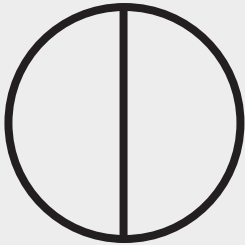
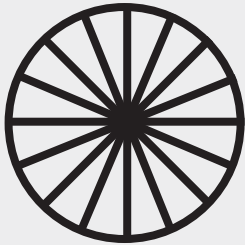
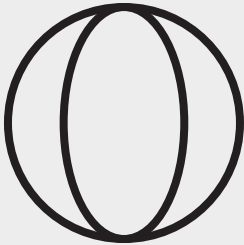
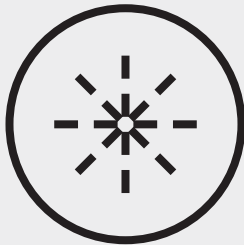
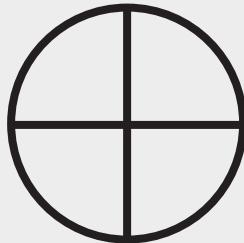
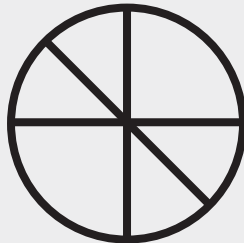
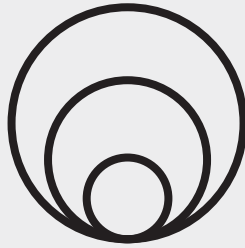
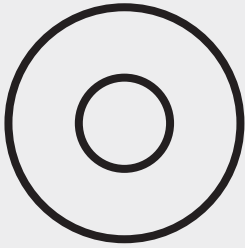
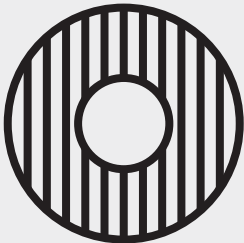
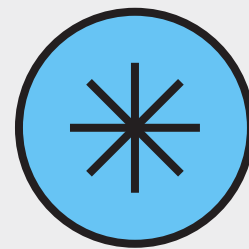

State of the Whole Brand 2022



RIGHT

NOW.



CAPITALISM IS GOING TO BE WITH US A LONG TIME.

We might as well get good at it.

WHO IS THIS REPORT FOR:

OPTIMISTS
CONNECTORS
DISRUPTORS
REVOLUTIONARIES
VISIONARIES
ACTIVISTS
CHANGEMAKERS
TROUBLEMAKERS

HOW TO USE THIS REPORT:

DON'T:



- Envy the featured whole brands.
- Save it to your desktop and forget about it.
- Stay fragmented.
- Think of your brand as a noun or an asset.
- Protect your silo.

DO:



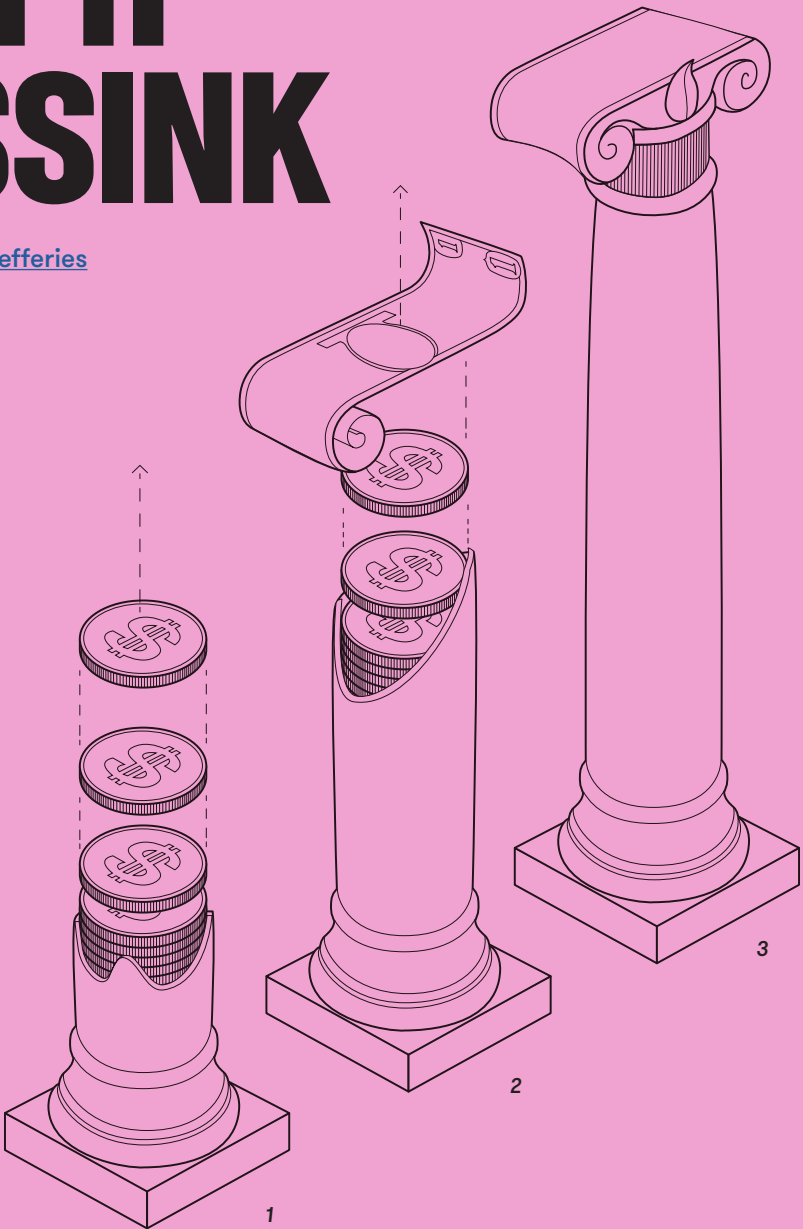
- Dog-ear points of inspiration.
- Share it widely.
- Take action now.
- Treat your brand as a verb and a set of actions.
- Build bridges everywhere.



HOW TO BUILD
A WHOLE BRAND

STEPH WISSINK

Managing Director, [Jefferies](#)



Whole brands are alive, with communities surrounding them that claim allegiance and affiliation, willing to advocate and support them, while also feeling powerful to shape and influence the brand’s future.

The role of brands is shifting, from simply affiliation to institution. Many structured institutions are breaking down, leaving room for brands to rise up and carry a new responsibility, a new license based on trust in community conversations, bringing people together around passion causes, and providing escape and relief from an uncertain world.

“Whole is something that is complete, in itself — robust and relatable but also dynamic and open to evolving and changing.”

1. LISTEN FIRST.

Engage your super-users and your haters, seek strong AND weak signals in data, and embrace ideation and feedback loops among your employees and partners.

3. ACT & ADAPT.

Brands are dynamic and staying in motion will ensure you can pivot when something unexpected comes at you.

5. LISTEN. LEARN. CHANGE. GROW.

Make the most of the “trust license” the world is giving you right now.

2. WELCOME ALL.

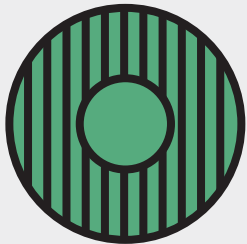
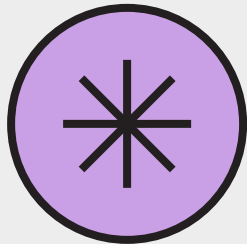
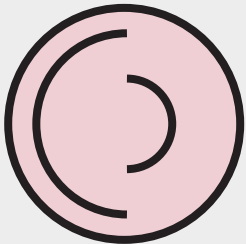


Don’t try to be something for everyone & forego your authentic truths in the process. Be distinct, not diluted.

4. REVOLVE. ROTATE. RESHAPE. RETHINK. RECAST.

Try not to simply react. Building cultural and brand muscle to story tell, be a journeyer, seeking new expressions and experiences that are aligned with your brand’s role and responsibility.



TABLE OF CONTENTS

	CONTRIBUTORS		PROOF		2022 WHOLE BRAND STUDY		WHOLE BRANDS IN ACTION
4 STEPH WISSINK Managing Director, Jefferies	45 ERIC RYAN Co-Founder of method, OLLY, Welly + Cast	10 HOW TO SPOT A WHOLE BRAND	11 HOW WE PROVE WHOLE BRANDS WIN	20 RESEARCH AT A GLANCE	23 THREE-STAR BRANDS	48 SUSTAINABILITY: Herman Miller, Sackcloth & Ashes, Ben & Jerry's	51 PURPOSE: Mastercard
8 IAN FITZPATRICK Global Senior Director of Brand Strategy and Operations, New Balance	54 NIKI KING Head of Sustainability, Unilever North America		HOW TO	38 CATEGORY WINNERS	42 KEY THEMES	49 CULTURE: Slack	52 ACTIONS: Tony's Chocolonely
14 KOANN VIKOREN SKRZYNIARZ Founder/CEO, Sustainable Brands	57 HILARY BUTLER Director of Marketing, Bonterra Organic Estates	16 HOW TO JOIN THE @EVOLUTION				50 PRODUCTS + SERVICES: IKEA + LEGO	52 PR: Airbnb
17 MIKE CESSARIO CEO/Co-Founder of Liquid Death	60 BART HOULAHAN Co-Founder, B Lab	56 WIN BY IGNORING THE MARKETING FUNNEL	59 RALLY THE TROOPS			50 DESIGN + EXPERIENCE: MTA	53 CONTENT: Motel 6
						51 RED THREAD: Delta Faucet	53 ADVERTISING: Tracksmith

Tim Galles, Director, The Whole Brand Project + Chief Idea Officer
David Gutting, SVP, Strategic Projects

EDITORIAL

Lindsey DeWitte, EVP, Purpose + Sustainability
Tom Demetriou, Executive Creative Director
Jen Mazi, Content Director

DESIGN

Paul Corrigan, Executive Design Director
Arthur Cherry, Design Director
Haylee Hedge, Senior Designer

RESEARCH + INTELLIGENCE

Chris Cardetti, Chief Strategy Officer
Joe Cardador, VP, Consumer Intelligence Director

IMPACT

Jennifer Cawley, SVP, Purpose + Sustainability
Phillipa Cross, Sustainability Lead

PRODUCTION

Miranda Byrd, Senior Studio Designer
Danielle Orwig, Proofreader

CONTRIBUTORS

Steph Wissink, Managing Director, Jefferies
Ian Fitzpatrick, Global Senior Director of Brand Strategy and Operations, New Balance
KoAnn Vikoren Skrzyniarz, Founder/CEO, Sustainable Brands
Mike Cessario, CEO/Co-Founder of Liquid Death
Eric Ryan, Co-Founder of method, OLLY, Welly + Cast
Niki King, Head of Sustainability, Unilever North America
Hilary Butler, Director of Marketing, Bonterra Organic Estates
Bart Houlahan, Co-Founder, B Lab

LET’S CONNECT

Tim Galles | tim@wholebrandproject.com

BECOME A WHOLE BRAND THINKER

If you or your brand would like to participate in or partner with us on future whole brand studies, we’d love to hear from you.

Jason Parks | jparks@barkleyus.com

All of the material in this document is copyrighted and may not be reproduced in whole or in part without express written permission. For permission, contact Jason Parks at jparks@barkleyus.com.

All trademarks and service marks are owned by their respective brand owners and are used solely for editorial and illustrative purposes. The authors are not affiliated with, sponsored or endorsed by any of the brand owners.



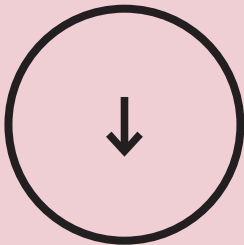
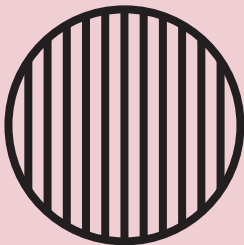
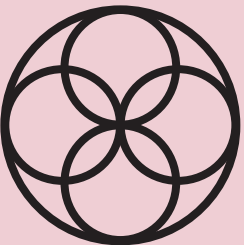
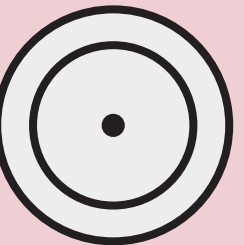
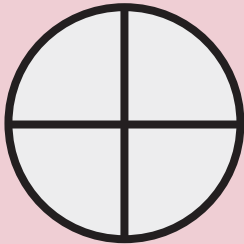
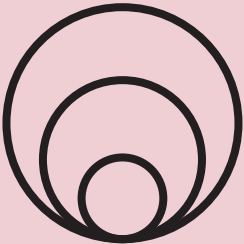
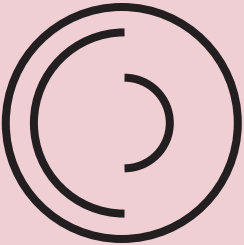
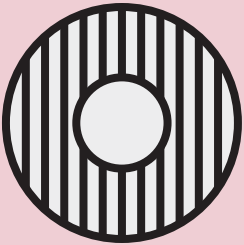
The Whole Brand Project is Barkley’s lab for studying and celebrating the power of whole brands and how they are winning with markets, people, communities and the planet. wholebrandproject.com



Barkley is an independent creative idea company that builds whole brands for modern consumers, employees and all stakeholders. We do this through three idea centers: strategy, design and activation.



As a Certified B Corporation™, we believe all brands, including ours, can be a force for good in the world. barkleyus.com





HOW TO BUILD
A WHOLE BRAND

IAN
FITZPATRICK

Global Senior Director of Brand Strategy and Operations, [New Balance](#)

A whole brand is one in which each function of the organization understands the role it plays in supporting the central tenants of the brand image. That could mean the way Accounts Payable prioritizes vendors (or whether they use that phrase at all!), the way product is shipped, the tenor of interactions with counsel, or how customer support is staffed.

Whole brands are born from the confluence of one thousand small decisions — none of them trade-worthy — that manifest as an organization with a clear and sustainable sense of self.

New Balance has established a brand built on more than a century of domestic manufacturing that promises the highest-quality product with meticulous craftsmanship and attention to detail. We are whole when that same purposeful attention to detail is applied to every facet of experience. It's how a shirt is folded on a shelf, how we spell-check press releases, the way an order is tracked. In a whole brand, it is understood that every expression supports (or undercuts) a central brand promise.

Delivering against that aspiration is really, really hard.

1.
LEAN INTO THE
MUNDANE.

Start with a thousand everyday interactions and make those a manifestation of who and what you are.

2.
HIRE WHOLE.

Build an HR practice to attract and hire people who get the brand and train them for tasks. Avoid hiring talent focused on channel expertise over the true nature of your brand expression.

3.
DON'T MODERNIZE.

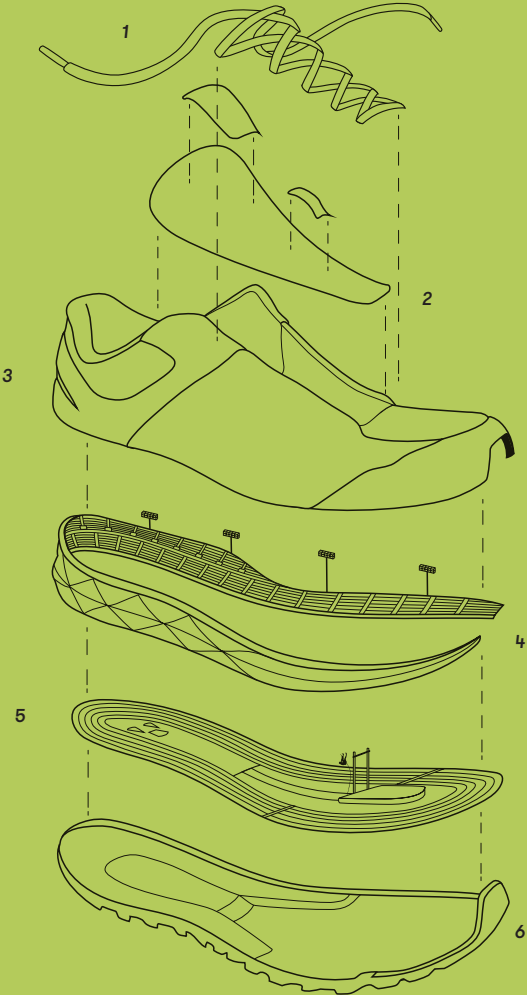
Resist with every fiber the pull of partners who want to reinvent your brand rather than expressing what is already great about it. Relentlessly strip away veneer that's been added on to your brand expressions by past bad hires. Upgrade systems on your own terms, and weigh carefully the true costs of efficiency and scale.

4.
EXPAND FOR FIT,
NOT EXPOSURE.

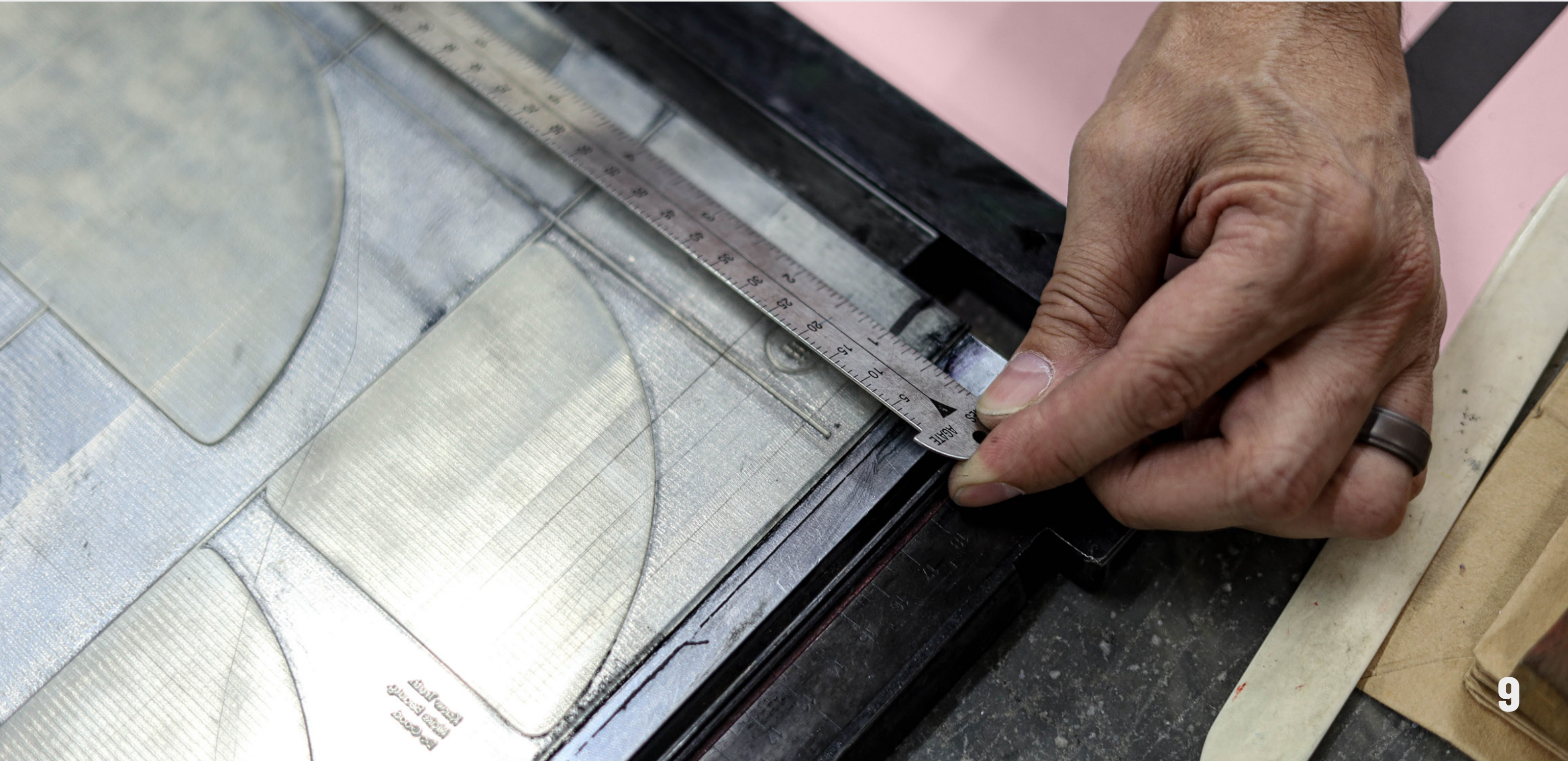
Establish new offices in places where your ethos has a natural home, and where talent can flow naturally into your brand expressions. For most brands, that won't be Boulder, Miami or Cupertino.

5.
COMMIT TO
A LONG GAME.

Brands become whole through the aggregation of expressions. This takes grueling, tedious, sustained effort over years. That's only worthwhile if you're committed to seeing through work that almost never manifests quickly — unless you're starting a brand from scratch. Almost no one will fully appreciate it as it's happening. Whole brands rarely earn their architects glory. Settle in, this is going to take a while.

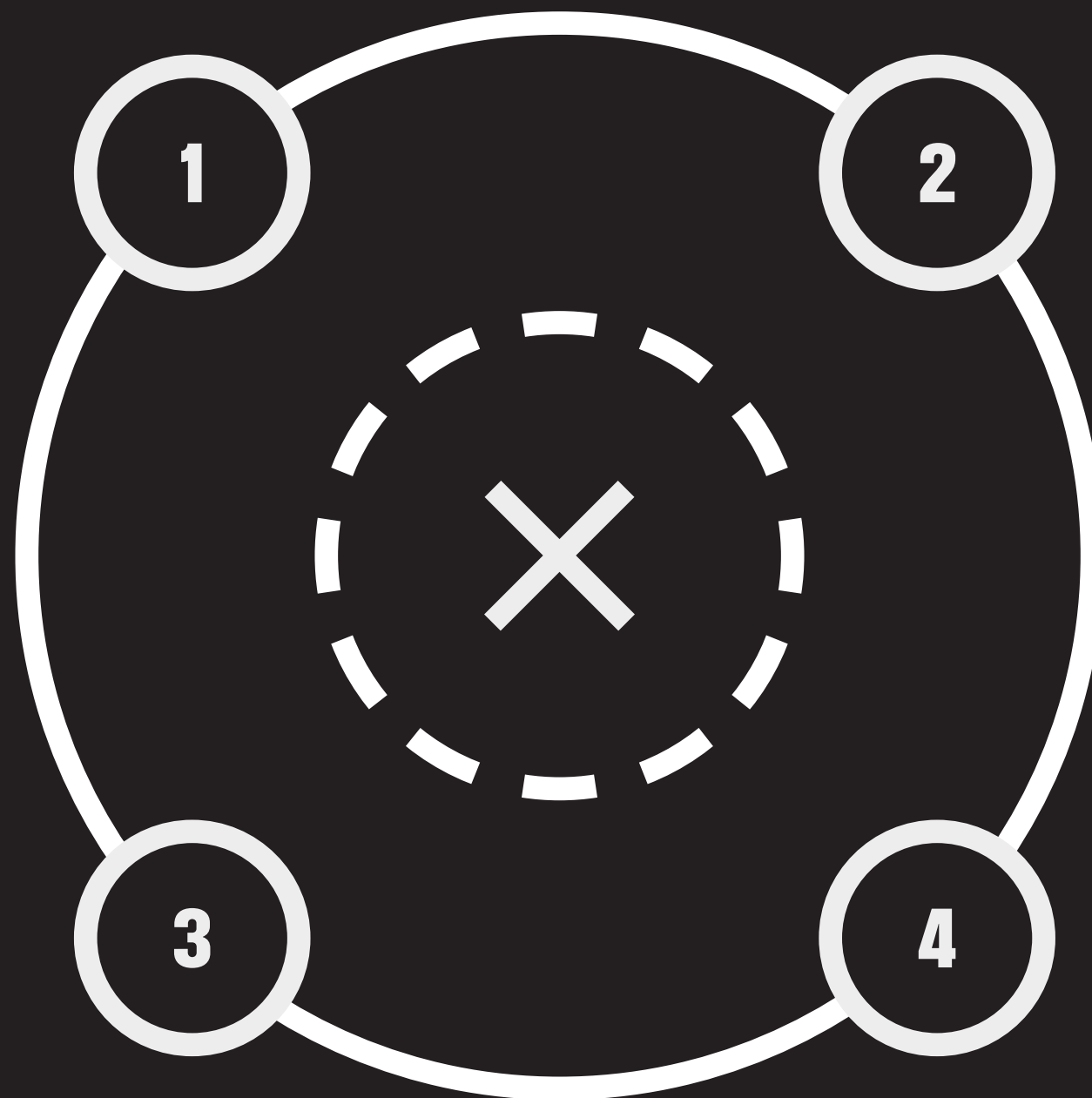


“
Whole brands
are born from a series
of exceptionally
mundane decisions,
continually aggregated.



HOW TO SPOT A WHOLE BRAND

Modern consumers don't see brands like most marketers, as parts and pieces. They don't see brands as media flowcharts, brand books and digital transformation roadmaps. They see brands as the sum of every experience they've had with a brand. They see the whole brand.



Four key characteristics make up the definition of whole brands and set them apart from fragmented brands.

1. A NEW DEFINITION.

A whole brand is an organization that treats everything it does as the brand.

2. THE CREATIVE ENGINE FOR YOUR BRAND.

A core, long idea guides, inspires and connects every action a whole brand takes, across the spectrum of marketing ideas to business ideas. We call this the red thread.

3. BRAND CULTURE INSIDE AND OUT.

A whole brand is full of purpose and action, and it matches what it says and does internally with what it says and does externally.

4. PROFIT + PERFORMANCE + IMPACT.

A whole brand measures success holistically by balancing profit and performance across the Whole Brand Spectrum with its impact on people, community and the planet.

HOW WE PROVE WHOLE BRANDS WIN

“

After three years of immersive and extensive research, we have an understanding of where brand growth and power comes from — and most brands don’t operate at maximum (brand) capacity. Competitive advantage is no accident, and for brands seeking it, now is the time to act.

— David Gutting, SVP, Strategic Projects, Barkley

Once upon a pre-pandemic time, we set out to discover whether we could generate a single number that can tell us who’s going to win in the marketplace.

Everyone wants to measure market performance in the rear view, we thought. What if we could predict it? Think Moneyball meets marketing meets mission statement.

In order to take a robust approach, we chose six widely accepted business metrics as their measures of market performance.

<u>Penetration</u>	<u>Recommendation</u>
<u>Preference</u>	<u>Usage</u>
<u>Premium Price</u>	<u>Velocity</u>

These six factors are how we would measure success.

To get simple, first we have to get complicated. We then identified five areas of business that are...

INCREDIBLY ACCURATE PREDICTORS OF MARKET PERFORMANCE:

1. PRODUCT & SERVICES:

What you make and sell.

2. BRAND CULTURE:

The knowledge, skill and energy your employees bring to your customers, clients, consumers and culture through the lens of your brand.

3. CX:

The experience of your customers across the whole brand.

4. DESIGN:

The visual and verbal system you have in place to get people’s attention — for them to recognize you on a scale of any size.

5. MARKETING:

The things you do to promote your brand, its products and services.

Whole brands
out **profit**
out **perform** +
out **impact**
fragmented
brands.

Period.

In three years of studying total brand performance — 13,000 consumers, more than 150 brands, 30+ categories — we found the top 20% of brands have consistent records of superior performance versus the 80% of brands scoring below them.



In a measurement scoring overall market performance, these brands outperform their weaker competitors by a margin of 50%.



They command a premium price: 33% of consumers — one-third of the entire market — will pay full price for these brands even when a direct competitor is on sale.



They have double the market penetration.



They are the preferred brand in their category 2.5 times more often.



These brands are 5 times more likely to be seen as “a brand on the rise” as opposed to “a brand on the decline.”

PERFORMANCE AMONG PUBLICLY TRADED BRANDS

2.5X EPS

Among publicly traded brands, the price-to-earnings ratio is 2.5 times greater than the 80% of brands below them.

6X CAGR

5-year compound annual growth rate (CAGR) is 6X greater.

**2:1 VS.
THE S&P**

Our top publicly traded brands advance 65% in market value over three years, compared to 32% for the S+P 500 overall.

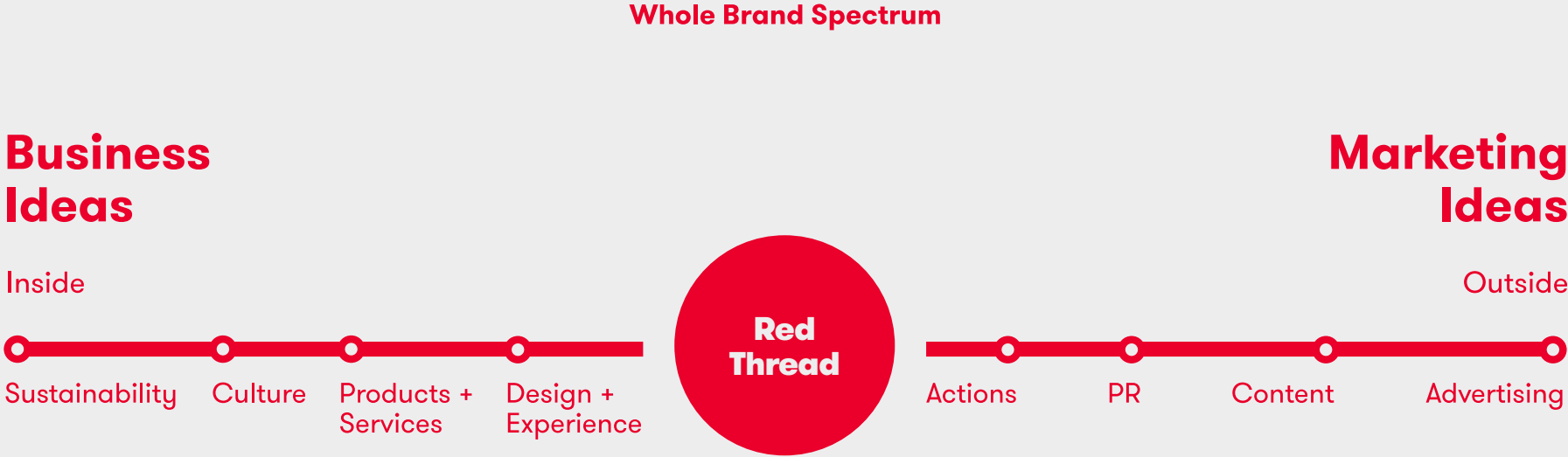
WELCOME TO WHOLE BRAND THINKING™

SOME QUESTIONS TO ASK AS YOU BUILD A WHOLE BRAND:

- Does your entire organization own your brand or just the marketing department?
- Do you have a common language that your entire organization uses to bring your strategy to life, connect departments and streamline innovation?
- Are you creating ideas that prove your commitment to your purpose or core idea, ideas the world needs? We call these “proof.”
- Are you adding good to culture, to people or to the planet, or are you just creating more interruptions, noise and stuff?

Much like design thinking, Whole Brand Thinking™ is a process and a belief that thinking holistically about brands results in a much more potent organization, one that people want to be a part of as employees, partners, consumers, customers and communities.

The Whole Brand Spectrum is a whole brand’s playground because it firmly believes every action it takes is one more reason for people to choose it. A whole brand sees everything it does — sustainability plans, culture, product and service innovation, design and experience, marketing — as creative endeavors, knowing that its biggest, unfair advantage is its belief and behavior system, and how creative its culture is.





HOW TO BUILD
A WHOLE BRAND

KOANN VIKOREN
SKRZYNIA RZ

Founder/CEO, [Sustainable Brands](#)

A whole brand is the sum total of who you are, what you do and how you do it. Every action you take, whether it's the decisions about ingredients, packaging design or materials, how you treat your stakeholders – from employees to suppliers to customers, to channels you use to market, to yes, the stories you tell and the voices you use to tell them — all of these and more define your brand as a whole today. The degree to which each of these things align, or do not, will either further brand trust and love through lived and experienced authenticity and integrity. A gap between what you say and what you do will lead to brand erosion and ultimately decline in sales in the market, as more integral brands step in to disrupt your space.

Most brands are somewhere on the journey to becoming what we define as future-proof, a sustainably regenerative brand of the future — but very few are there yet. We do not believe it's necessary to be perfect before declaring your ambition to be such a brand. We do, however, believe it critical to assess your whole brand strengths and weaknesses across five pillars we define as the whole of a sustainable brand today: Purpose, Influence, Product & Service Innovation, Operations & Supply Chain and Governance.

“ Whole brands are on an intentional path to becoming future-proofed, sustainably regenerative brands.

1.
MEASURE
YOUR WHOLE
ORGANIZATION.

Engage cross-functional leadership to build an aligned understanding of where you are collectively on the journey from being a conventional brand to becoming a future-fit, sustainably regenerative brand of the future.

2.
UNCOVER YOUR
UNIQUE PURPOSE.

Uncover your opportunity to build a unique and authentic brand value proposition that sits at the intersection of what the world needs, what consumers want and what you can uniquely deliver given your brand equity.

3.
LEVERAGE
A UNIQUE
ADVANTAGE.

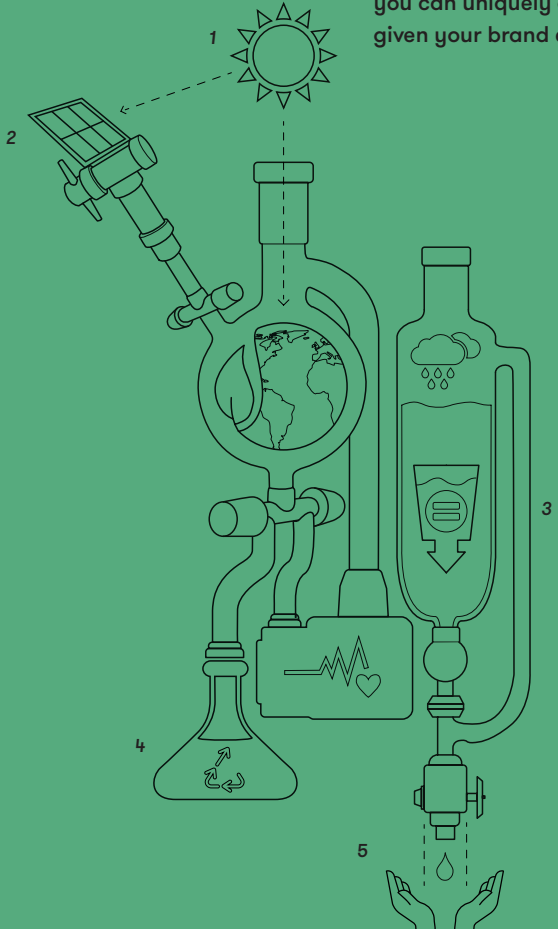
Invest in innovation to deliver a materially positive environmental or social impact action or set of actions, born from your brand purpose and your brand authority and that's uniquely yours.

4.
TEST BEFORE
YOU ROLL.

Leverage best practice playbooks, craft messaging to engage your customers and test before rolling out your campaigns to help you finalize your go-to market story. Test and learn. Repeat as necessary.

5.
KNOW HOW
OTHERS SEE YOU.

Measure the unaided impact your work and storytelling are having in the marketplace among your core demographic on brand trust, favorability and impact. This helps your customers close the gap between their intent to live healthier, more sustainable lives and the actions they actually take each day.





BRAND: A REVOLUTION

Brand is a very misunderstood word.

The marketing industrial complex has long defined brand as something to be turned up or down, invested in or not. A noun. Put it in the corner, let the marketing department define it.

Wrong: Brand is a verb.

Whole brands see everything they do, inside and out — every experience they create — as the brand.

Why? Because that's how people see them. These brands have clear beliefs, with behaviors and actions that back them up.

Whole brands look at everything as a creative opportunity. They are original in their thinking, from marketing to business ideas and all the ideas in between.

This flip in brand thinking totally changes the game — a game consumers and employees excel at. When you begin to see your brand as every action it takes, business gets better, stronger, more connected and coherent. Potent, even.

A WINNING NUMBER

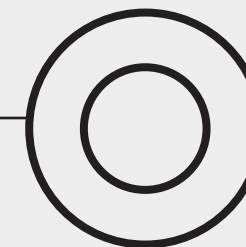
We have researched this powerful effect for the past three years in our whole brand study. At the core of the study is proof that whole brands don't just win — they win by a mile.

Our study shows how whole brands dominate weaker, fragmented brands by more than 40%.

WHEN CHAOS RULES, WHOLE BRANDS DOMINATE.

Post-2020, change is now truly the only constant. Chaos will rule until we tame it. The great news is we can do that.

Whole brands are built for now and next. And as people and brands emerge from the turmoil of the last two years, opportunities and pitfalls abound. Organizations with beliefs solidified and activated by behaviors across their entire brand find themselves better positioned than those with no sense of purpose or impact. Brands that rely on marketing or residual interest in their products or services have been, and continue to be, at a severe disadvantage.



This fact alone may be motivation enough to launch Whole Brand Thinking™ in your organization, at a trajectory to the right side of the future where companies stay relevant and competitive. But whole brands also stand on the right side of history, measuring their impact on people, community and the planet. They become brands the world needs, not just transactional machines myopically focused on profit.

No matter where you find your brand in 2022, this report is for you. With insights into 126 brands across 18 categories, you'll see both the potency and potential of Whole Brand Thinking™, and how the creativity it unleashes becomes a force for good.

And because we feel strongly that a world with more whole brands would be a better world, we combine all this useful data with ideas you can start using right now.

May the most whole brands win.





HOW TO BUILD
A WHOLE BRAND

MIKE CESSARIO

CEO/Co-Founder of [Liquid Death](#)

A whole brand is a brand that transcends its core product and represents something much bigger. It goes beyond just a functional benefit as to why people love the brand. A brand is not a whole brand when its messaging is limited to a small aspect of a person's mind space. Nike is a whole brand as it transcends the functional details of rubber or shoe fabrics. It taps into a larger mindset inside people beyond shoes. A "partial" brand (not whole) is one that doesn't go beyond the functional benefits of their product or service in their communications.

Whole brands talk and act like real people instead of acting like offices. Real people aren't terrified of having an opinion on a variety of topics, they are ok with having faults. They don't need to be loved by every single person they meet. They are complex and have a range of emotions. They are ok with disagreeing about something with a friend, and they might be the type of person you'd want to hang out with. If most people talked to their friends and family the way most brands talk, they wouldn't have many friends or relationships, regardless if you are telling the truth or pushing an important issue.

“

Whole brands
treat marketing
like it's a product
of its own.

1.
STOP LIVING IN
FEAR OF RANDOM
PEOPLE ON
THE INTERNET.

3.
FIND LEGITIMATE
REASONS PEOPLE
WOULD STILL LOVE
YOUR BRAND, EVEN
IF YOUR PRODUCT
DISAPPEARED.

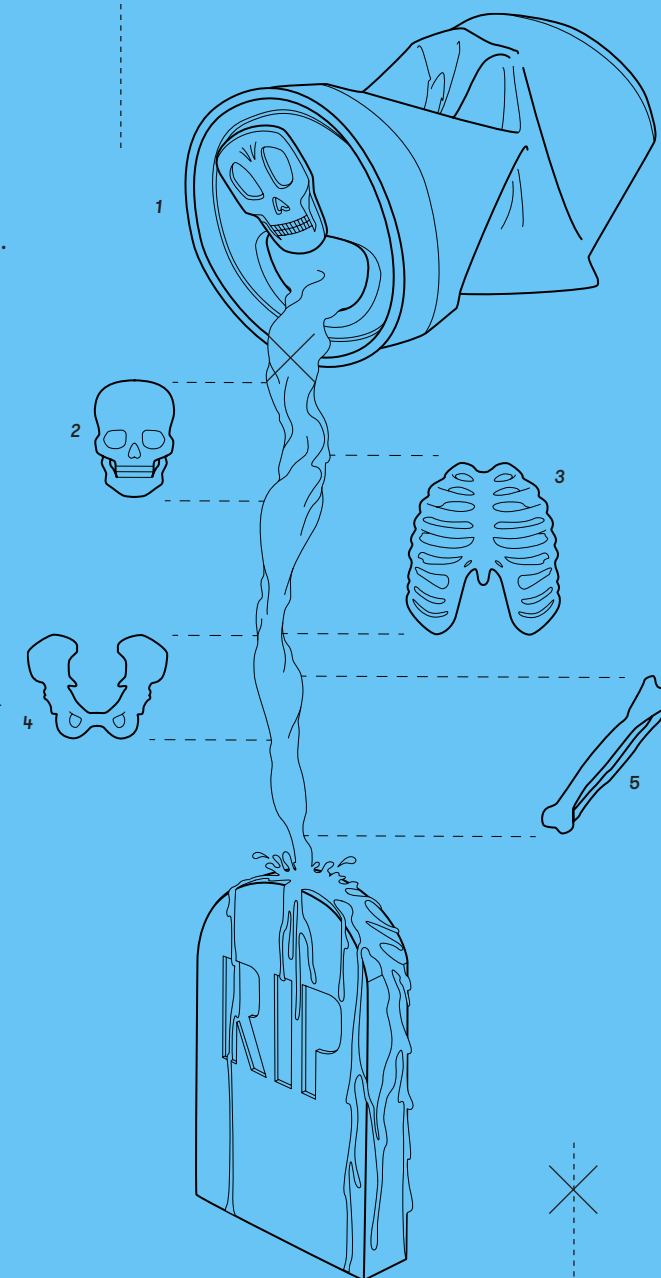
5.
TREAT YOUR
MARKETING LIKE
IT'S A PRODUCT
OF ITS OWN.

Is it so interesting, funny, emotional and entertaining that people would actually pay a fee just to experience your marketing? If your honest answer is "maybe a few people would," then your brand is probably ahead of 99% of other brands.


2.
MAKE YOUR BRAND
MORE ACCURATELY
REFLECT THE
PEOPLE RUNNING IT.

4.
EMBRACE THE IDEA
THAT YOU HAVE
NO CLUE WHAT
WILL ACTUALLY
END UP WORKING
THE BEST.

Treat ideas like the stock market. Make lots of small bets and take calculated risks. You'll almost always be dumbfounded at what actually ends up being the home run (and you never could have predicted it).







THE 2022 WHOLE BRAND STUDY

RESEARCH AT A GLANCE

In our third national study, we once again measure the strength of whole brands — brands that see everything they do as their brand.

Whole Brands have a core idea that guides every action; they excel at everything, not just marketing; and they measure success by balancing profit and performance with their impact on the world.

This year's research covered 126 brands in 18 categories, measuring the views of 5,000 U.S. consumers.

The study proves that whole brands grow more and faster than others. They are more likely to dominate their categories and command higher prices. People recommend them more often to others. And the results offer clues into how brands can take advantage of Whole Brand Thinking™ to find the most consistent path to growth. The study yielded scores of metrics, offering countless ways to look at whole brand performance. For the sake of simplicity, there are three scores that comprise an informative dashboard for all brands in the study:



WHOLE BRAND INDEX (WBI):

A composite score, on a 100-point scale, measures five sets of brand actions: product value, workforce performance, customer experience, design system visibility, and effectiveness of communications and advertising. It's the most important score in the study, because of its predictive power, which is addressed below.

The average score this year was 76, with a high of 90 and a low of 57. Brands with a WBI greater than 81 occupy the top quintile.

The WBI is our most important measurement. It's the broadest and deepest assessment of a brand's "wholeness," of its behavior end-to-end as a successful enterprise.

MARKET PERFORMANCE AVERAGE (MPA):

Expressed as a percentage, this score measures six marketplace results: a brand's penetration, how often it is the preferred brand in its category, the

net percentage who are willing to pay full price for the brand, percentage who have recommended the brand to others, percent who have increased usage of the brand in recent months, and the brand's net velocity — whether it is seen as a brand on the rise or on the decline.

The average MPA this year was 29%, with a high of 52% and a low of 11%. The top quintile averages 42%.

PURPOSE POWER:

Also expressed as a percentage, Purpose Power is the percentage of consumers who think a brand stands for more than making money.

Scores ranged from as low as 20% to as high as 78%, averaging 44%.

THE WHOLE BRAND DASHBOARD



Here’s a snapshot of how these three metrics work together and what they do:

A METRIC OF BRAND ACTION

A composite score, on a 100-point scale, measuring everything a brand does against its competition across five key dimensions.

All brand actions fall under one of these five dimensions.

The WBI is an independent variable fully under the brand’s control.

A METRIC OF BUSINESS RESULTS

A single percentage score averaging six key business performance results.

These are results that allow C-suites to prove their success and to compare the enterprise to all competitors.

The MPA is a dependent variable that the business can influence but not fully control.

A METRIC OF FOCUS AND VALUES

A percentage score that reflects how strongly consumers perceive higher purpose than profit motive in a brand.

Purpose cannot be treated in isolation with a brand — it touches multiple dimensions, and is found as a communication claim as well as a factor in brand experience.

KEY FINDINGS

After three years of researching 13,000 consumers and more than 150 brands in more than 30 categories, we have found:

1.

The WBI strongly correlates to brand success in the marketplace. When it increases, the MPA increases as well. When it declines, so does MPA. The r^2 correlation in this year's study is 69%. Over three years, it has averaged 65%. That means the WBI explains more than two-thirds of what a brand does in the marketplace.

Find out your WBI: All brands should find out their WBI score and plan their strategies accordingly. It's the one number that can point you in the direction you need to go. It's strategic direction at the highest, most impactful level.

2.

On average, brands scoring in the top 20% of WBI (approximately 81 or higher on a 100-point scale), **have double the penetration** of all brands below that level.

3.

These brands are **the most preferred brands in their categories 66% more often** than lower-scoring brands.

4.

Almost **60% of people are willing to pay a premium** for a high-scoring brand.

5.

Consumers **actively recommend high-scoring brands 45%** of the time, compared to just 30% for other brands.

6.

Brands with clear, decisive purpose do better than brands lacking that attribute. The correlation between Purpose Power and MPA is $r=0.64$, with an r^2 value of 41%. While this is slightly less than the correlation between WBI and MPA, it is nonetheless compelling.

7.

Brands with high WBIs are more stable and consistent than other brands. Measured at the individual consumer level, it shows about 25% less variance in its scores than other brands. **It is like finding a high-yield investment with low volatility.**

8.

Components of the WBI vary in the level of impact they make on a brand selection decision, with product value being the strongest at 24% level of influence. Using “relative weights analysis” to arrive at these assessments, it is possible for brand managers to determine where to place their investment and how to orchestrate an effective whole brand strategy.



THREE- STAR BRANDS

In a study with 126 brands, there’s a wide range of variance in performance, with a handful of stellar brands that rise to the top. We call these Three-Star Brands: those that exhibit a peerless level of excellence and depth, similar to the legendary Michelin Three-Star Restaurants. To make our selections for this elite group, we reviewed brands with high scores in the Whole Brand Index, Market Performance Average, and Purpose Power.

We also considered less prominent scores in the study, such as exclusive use of a brand. We calculated a wide range of ratios and made cross-category comparisons to uncover standouts. And we looked at publicly available data on brands, from published financial performance to general news stories on brand actions and reputation.

Twelve brands emerged as statistical winners:



Mercedes-Benz



WHAT DO THESE NUMBERS TELL US?

The WBI measures deliberate choices that consumers make among a blizzard of endless brand actions. Those brand actions have an encompassing impact on the brand’s success in the market. The Three-Star Brands have a WBI average of 83, 9% higher than the average of 76 for all 126 brands in the study.

The Market Performance Average (MPA) measures that success. The MPA is a true average, an aggregated mean for the results a brand achieves going against competitors. It has six elements:

- **Penetration:** What percentage of the market has purchased the brand in the last year?
- **Preference:** What percentage of time is it bought most often?

- **Advocacy:** How often does it get recommended to others?
- **Price Premium:** What is the net percentage of consumers willing to pay full price for the brand even when a competitor is on sale?
- **Usage Trend:** How many people have increased usage of the brand in the last six months?
- **Velocity:** What is the brand’s net “on-the-rise” score vs. its “on-the-decline” score?

Any brand that excels in these six elements is sure to prosper. Collectively, it measures just about everything a brand needs to achieve. With a 41% average across all six of these, our Three-Star Brands set a high standard. The average for all brands is 29%.

The difference between an average brand and a Three-Star Brand is 7 points in the Whole Brand Index. Percentage-wise, that’s just 9%. But the difference that makes in the marketplace is far greater. The Three-Star Brands average 41% versus 29% for brands in general. That is a “lift” of 40%. Not something to ignore.

WHOLE BRAND INDEX



MARKET PERFORMANCE AVERAGE



PURPOSE POWER



THREE-STAR BRANDS:
A CLOSER LOOK



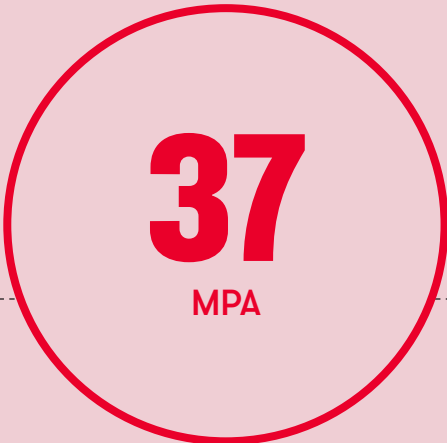
When you pair consistency with a purpose score of more than 50%, you get a brand with a huge reserve of stored power.

WHAT SETS THEM APART?

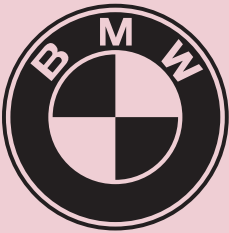
In a category where price constitutes about 40% of consumer decisions, BCBS often defies gravity. It wins — both with employers and consumers — even though it is rarely the “value” brand. In our study, it wins the WBI battle by a landslide: 13 points ahead of #2 United Healthcare. In our study, only Nike surpasses them in being “easy to recognize and find.” It even beat McDonald’s in that regard. Almost everyone recognizes them, though the category it competes in is one of the least popular in American life.

WHAT’S THEIR MAGIC?

Conventional wisdom would tell you it’s the size and power of its provider network. There’s truth to that, but the rest of the industry is catching up. Our study reveals something else: consistency. BCBS has an extremely low coefficient of variation in how consumers score its brand actions. All its scores are high, and there’s wide agreement about that. Again, only Nike beats them here. When you pair that consistency with a Purpose score over 50%, you get a brand with a huge reserve of stored power.



THREE-STAR BRANDS:
A CLOSER LOOK



The Ultimate Driving Machine is not just a claim, it’s a brand truth.

WHAT SETS THEM APART?

BMW was a Three-Star Brand last year as well, and all it does is get better. Precision engineering sets its cars apart from all others, and similar precision sets its brand apart as well. Two other luxury car brands, Tesla and Mercedes, are Three-Star Brands as well. But of the three, BMW wins the category for highest Whole Brand Index of 83. Going head-to-head on the brand dimensions that matter to consumers, BMW wins on virtually all of them.

WHAT’S THEIR MAGIC?

It is not a brand you readily replace, despite topping a category where tempting replacements abound. It has an astonishing combined “penetration + preference” score of 76, shredding its competitors, and only 25% say they sometimes go for other brands in the category. The Ultimate Driving Machine is not just a claim, it’s a brand truth.



THREE-STAR BRANDS:
A CLOSER LOOK

Calm

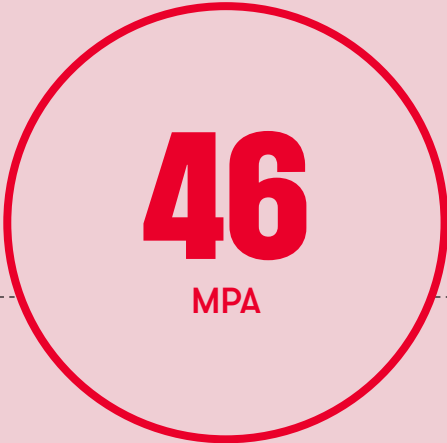
The hot-hand for Calm is that in this fast-moving category, it remains the brand seen as most “on the rise.”

WHAT SETS THEM APART?

Wellness and health insurance are two categories where taking care of people is the objective. The difference is that people tend to love wellness and hate health insurance. Because wellness is well-liked, it’s tough for wellness brands to stand out. The hot-hand for Calm is that in this fast-moving category, it remains the brand seen as most “on the rise.” Young brands need momentum, and Calm has it.

WHAT’S THEIR MAGIC?

Along with Fenty, Calm has the distinction of ranking in the Top 10 among all brands studied in three different categories: Whole Brand Index, Market Performance Average, and Purpose Power. Calm has had a lot to do with making mindfulness and mental health pillars of modern cultural life, and years from now, it will be a brand of remarkable power and influence if it continues its spirit of innovation and human connection.



THREE-STAR BRANDS:
A CLOSER LOOK

COVERGIRL®

Its mental and physical availability are so powerful, it's immune to the viral assaults of the upstarts. The Cover Girl smile endures no matter what.

WHAT SETS THEM APART?

Cover Girl knows how to play the cards of an established brand that has long been a household name. In a category where disruption is everywhere — and where it's fueled by unprecedented media upheaval — Cover Girl transcends the chaos with the force of sheer dominance. It doesn't have to worry about feisty Instagram brands popping up around them because it is the Secretariat of its field. How so? Its mental and physical availability are so powerful, it's immune to the viral assaults of the upstarts. The Cover Girl smile endures no matter what.

WHAT'S THEIR MAGIC?

They know how to be a legacy brand and how to hold that position. It is never stale and its product line is built to be inclusive and essential. A WBI of 85 puts them in rarefied air. With that score, it's hanging with an elite crowd: Amazon, Netflix, Blue Cross, and Nike. We've said from the beginning that no score on our dashboard is more important than the WBI, and Cover Girl proves it in every dimension. It dwarfs its competitors.



THREE-STAR BRANDS:
A CLOSER LOOK

F E N T Y B E A U T Y

This brand knows how to take a slice of momentum and spread it to everything it does.

WHAT SETS THEM APART?

Fenty Beauty is a cultural phenomenon, a media powerhouse in its own right, and the latest manifestation of the celebrity persona, Rihanna — embraced on a mass scale. With 11 million Instagram followers, it came as no surprise to us that it pierced the Top 10 in our three most important dashboard metrics: WBI, MPA, and Purpose Power. Calm is the only other brand with that distinction.

WHAT’S THEIR MAGIC?

Fenty Beauty knows how to take a slice of momentum and spread it to everything it does. Since last year, it added slightly more than 8 points to its WBI, and it did it not by jumping ahead in just one or two dimensions, but in all. That’s a sign of a mature, self-assured brand with a keen sense of what it takes to win in the long run. Instagram brands come and go, so do brands with a sudden TikTok moment. Fenty has transcended that and, based on what we have seen from them over the last two years, it’s here to stay.



THREE-STAR BRANDS:
A CLOSER LOOK



Its appeal as a brand for meditation beginners has served them well and could be a launching pad for breakthrough growth.

WHAT SETS THEM APART?

Along with Calm, it has become synonymous with the invention of its category: technology meets ancient art, meditation. The result has been a revolution in wellness. Other wellness brands, like Nike Run Club and My Fitness Pal, quantify fitness and are all about moving. Headspace and Calm are about slowing down. Headspace is the more entry-level brand, appealing more to newbies and bringing them into the category. Compared to last year, it is lagging behind Calm more.

WHAT'S THEIR MAGIC?

Its appeal as a brand for meditation beginners has served them well and could be a launching pad for breakthrough growth. Though it trails Calm, the margin is so small, it's negligible. If it can leverage trial appeal to new audiences, it could grow ahead of all others in the wellness category. Its replacement factor is relatively low, whereas the non-meditation wellness brands are frequently replaced by others both inside and outside the category.



THREE-STAR BRANDS:
A CLOSER LOOK



They are the only ones who do what they do. And they just keep doing it.

WHAT SETS THEM APART?

Jerry Garcia would have loved them: They are the only ones who do what they do. And they just keep doing it. IKEA shreds the rest of its category. On the surface, home decor is a variation on a theme, with differentiation a challenge. To stylize your home, it’s natural to shop around. People do, but the niche for IKEA is so powerful that it won this competitive category by 6 points against a formidable competitor — Home Goods.

WHAT’S THEIR MAGIC?

They draw everyone in. Home Goods wins the addicted shopper, but IKEA wins for answering the need occasion. No one goes there every week. The navigation is too complicated and the drive is usually too far. But it doesn’t matter. Eventually, you’ll wind up there, because it will have your answer. For a good price, too.



THREE-STAR BRANDS:
A CLOSER LOOK



Mercedes-Benz

It is the essence of the luxury automobile. In our data, it was rated “best product” more often than any competitor.

WHAT SETS THEM APART?

It is the essence of the luxury automobile. In our data, it was rated “best product” more often than any competitor, including the formidable Tesla who has done so much to reshape the category product line. It never fails to do well with whatever it does. In Interbrand’s annual ranking brand value, it is the only car brand to break into the top 10, with a brand valued at \$50 billion.

WHAT’S THEIR MAGIC?

Seamless adaptation. Like many automakers, they have committed to an all-electric future. Smart money should look at what Mercedes does to make that transition, because it seldom gets it wrong with the path it chooses. It’s done with its command of style and safety. The EV world awaits.



THREE-STAR BRANDS:
A CLOSER LOOK



A brand of Nike’s power could easily fall into a rut of complacency or just have a slump. It does not.

WHAT SETS THEM APART?

No one can keep up with Nike, no matter the category. One thing remarkable about its performance in athletic wear is that it’s essentially a commodity category in so many respects; but Nike defies that with a central idea that makes everyone inclusive into its world. It’s why out of 126 brands, it is number one in how often it is named as having the “best brand” score across all five brand dimensions, 53% of the time.

WHAT’S THEIR MAGIC?

Nike understands that it’s always a new game. A brand of its power could easily fall into a rut of complacency or just have a slump. It does not. The culture of accomplishment it has invented for the ordinary person is an extension of its own being. Each new day brings its own challenge, another reason to rise to the occasion. For three years running in our research, it has held the number one position in the Whole Brand Index. No other brand has come close to eclipsing them. It never becomes entrenched in its own success.



THREE-STAR BRANDS:
A CLOSER LOOK



Its message of being the fitness brand for “the other 80%” is an authentic appeal — and a price as low as \$10 per month is living proof.

WHAT SETS THEM APART?

Accessibility. Its message of being the fitness brand for “the other 80%” is an authentic appeal — and a price as low as \$10 per month is living proof. Like gyms everywhere, the pandemic assaulted its business, but it is as ubiquitous as ever. Peloton, its most dangerous competitor, fumbled its opportunity to take a commanding position during a time when staying at home wasn’t a choice.

WHAT’S THEIR MAGIC?

A knack for distinction. Planet Fitness fancies itself as more than a summer wind coming around for a short fling. For a brand dedicated to democratizing fitness, it carries an air of royalty about them — no brand flaunts purple and gold without a sense of demanding to be noticed. Again, the contrast to Peloton. Peloton is the quintessential modern brand — techy, purpose driven, culturally inspired. But as real brands, PF outworks them.



THREE-STAR BRANDS:
A CLOSER LOOK

TESLA

Even though Interbrand rates Mercedes-Benz as the most valuable car brand, the markets declare the most valuable brand to be Tesla.

WHAT SETS THEM APART?

It has always defied the odds. Even though Interbrand rates Mercedes-Benz as the most valuable car brand, the markets declare the most valuable brand to be Tesla. The two metrics are not the same, of course, but for a brand that sells less than a million vehicles per year to hold a market cap of \$660 billion tells you the power it commands.

WHAT'S THEIR MAGIC?

Exciting expectations. Two components of our Market Performance Average are metrics that reflect different kinds of buzz. One is “net willingness to pay more for the brand” and the other is “brand velocity” — the net percentage who see the brand as “on the rise” as opposed to “on the decline.” At 64% and 62% respectively, Tesla ranks number one in each. Financial markets are expectation markets, and it plays that game better than anyone. People really believe it will change the world.



THREE-STAR BRANDS:
A CLOSER LOOK



YouTube always manages to be right for its times.

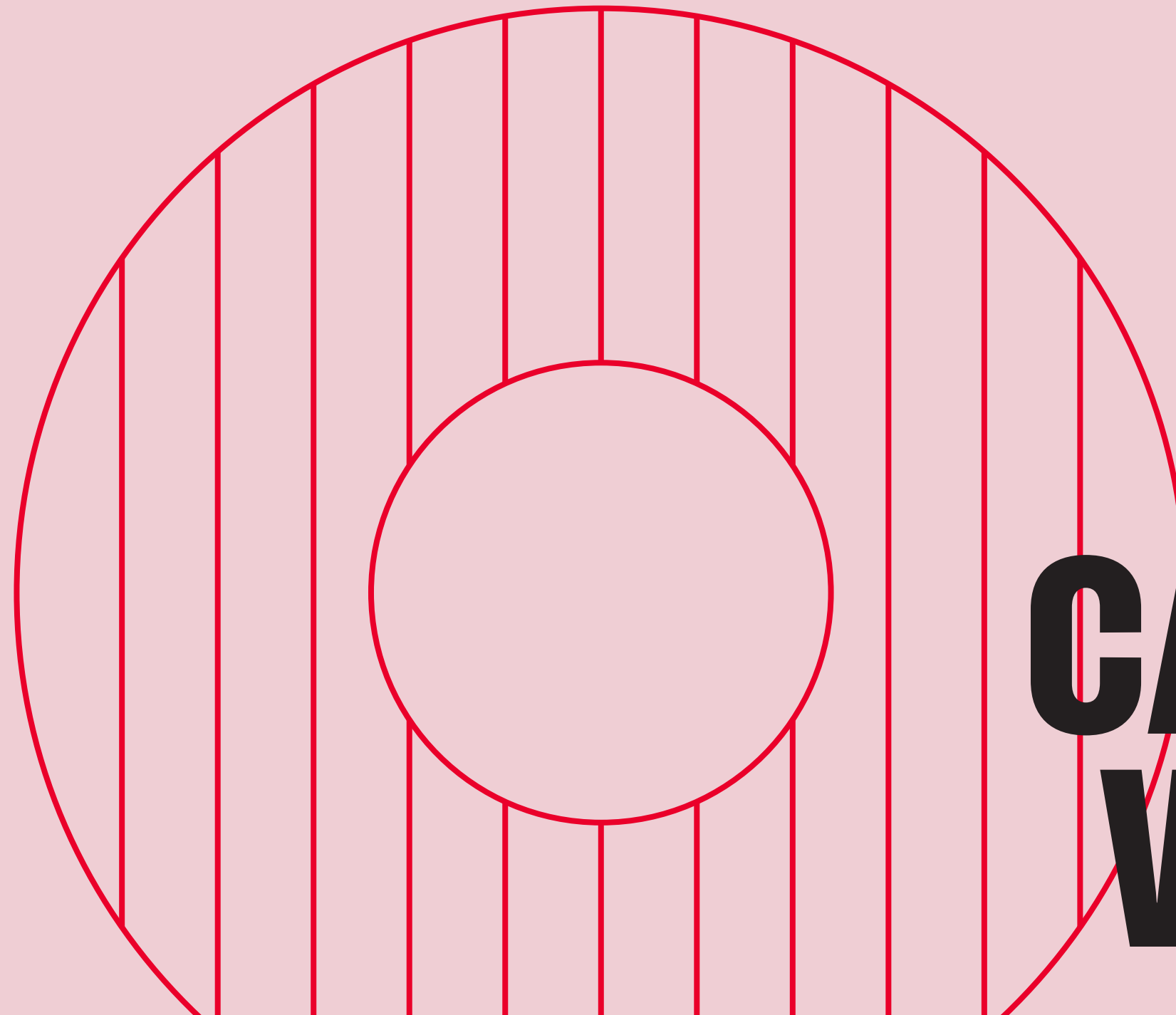
WHAT SETS THEM APART?

Strange as it may sound, YouTube, competing in the streaming category, carries the power of a legacy brand. But here’s what’s interesting: in holding that position, the brand continues to have a startup lore about it, a youthful freshness that makes it an atypical legacy, which usually implies a lagging sense of relevance. YouTube always manages to be right for its times. When the brand first appeared in the early 2000s, it was right for the moment: offering a new video tool that worked without choking the software on the average person’s computer. They’ve maintained that pattern.

WHAT’S THEIR MAGIC?

Pragmatism. YouTube is simple and useful. Both boomer grandmas and Gen Z’s use the platform to learn just about anything — from how to clear a drain to how to install an eco-friendly thermostat. This simple, utilitarian foundation has also been the ideal model for legitimizing influencers with mass followings, fundamentally resetting our media culture. It’s the only media brand to garner a Three-Star designation. Netflix and TikTok get more chatter than YouTube, but neither has YouTube’s ubiquitous power and reach.





CATEGORY WINNERS

CATEGORY WINNERS



Airline



Athletic Wear



Auto: Highline



Auto: Midline



Beauty: Haircare

F E N T Y B E A U T Y

Beauty: Makeup



Beverage



Fitness



Food/Snack



Grocery



Health Insurance



Home Decor



Investment



Large Retail



Restaurant: Fast Casual



Restaurant: Quick Serve



Streaming Service



Wellness

The most important context for any brand is the category in which it competes.

True, there are some brands that defy being slotted into a category. Think Starbucks, Nike or Amazon. It’s really a matter of how consumers choose to see them and when it becomes a purchase option.

The Whole Brand Model is useful for understanding how categories work and for learning what makes them distinct. The chart to the right is a treasure trove of insight, based on category-average WBI scores. You can see that the scoring range itself is relatively wide, from an average of 72 for health insurance to a high 81 for Highline (i.e., “Luxury”) automotive at 81. The brand average overall for WBI is 76, so nine categories come in below the average of the entire dataset. There’s an even more pronounced pattern when it comes to MPA: only five categories are above 29%, which is the all-brand average for MPA.

This tells us there is plenty of variance in brand actions and performance, meaning that the scoring of brands with a high-level dashboard is extraordinarily useful as a planning tool.

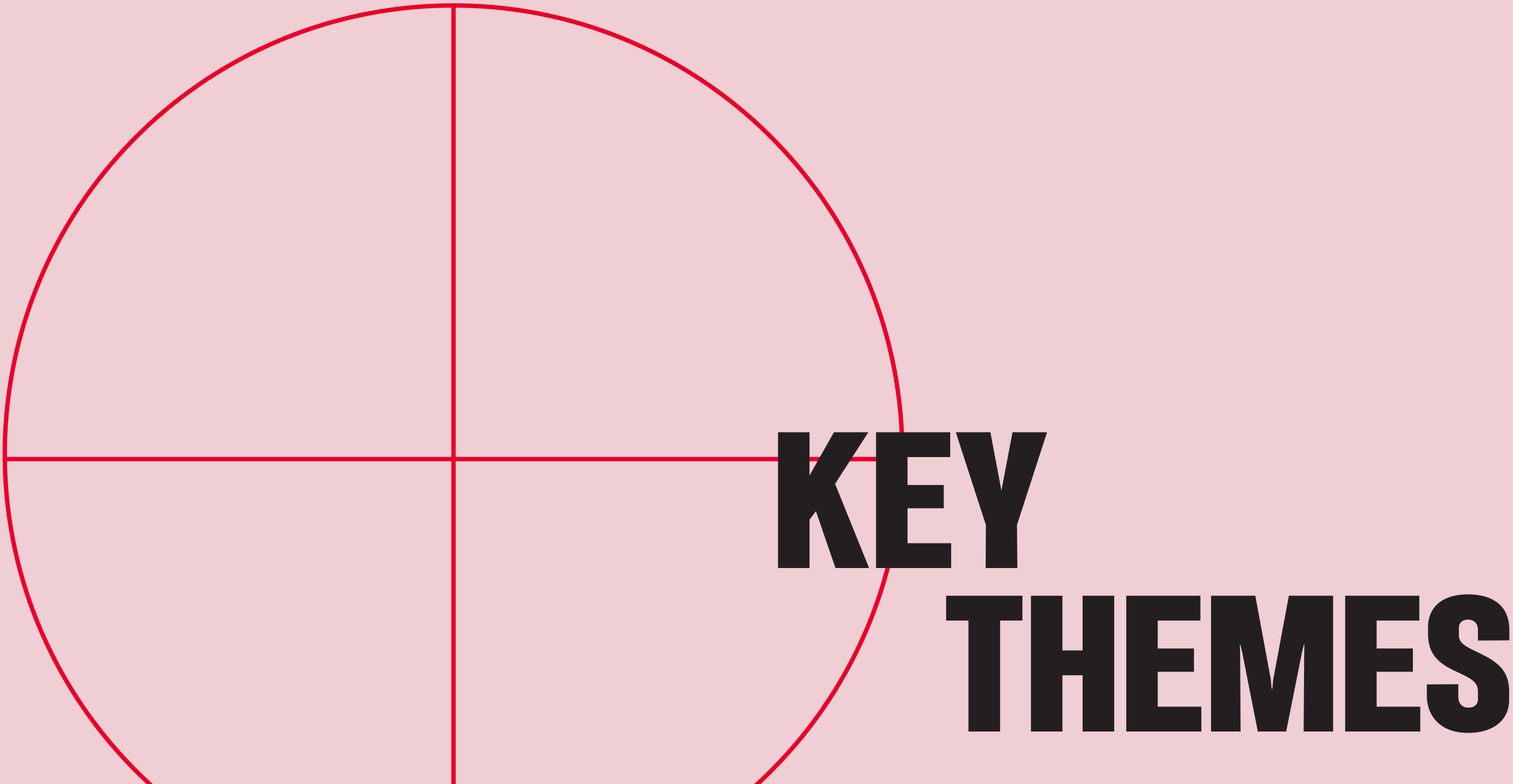
KEY WHOLE BRAND AVERAGES BY CATEGORY

CATEGORY	WBI	MPA	PURPOSE
Airline	74	24%	35%
Athletic Wear	77	29%	45%
Auto: Highline	81	41%	56%
Auto: Midline	75	24%	43%
Beauty: Haircare	77	32%	47%
Beauty: Makeup	78	29%	47%
Beverage	73	29%	38%
Fitness	75	29%	48%
Food/Snack	78	29%	44%
Grocery	76	27%	45%
Health Insurance	72	21%	39%
Home Decor	75	27%	41%
Investment Services	76	28%	45%
Large Retailer	75	27%	39%
Restaurant: Fast Casual	74	28%	40%
Restaurant: Quick Service	73	30%	40%
Streaming Service	78	34%	39%
Wellness	79	38%	62%

18 category leaders show what it takes to win against competitors.

The next chart shows our category “winners,” based on WBI scores. A number of interesting patterns emerge when you look below the surface. There’s considerable variation in the winning margins among the category leaders, from as low as three whole brand points to as much as 13. The two most dominating brands versus their categories are an odd couple to be sure — Nike in athletic wear and Blue Cross and Blue Shield in health insurance. But is it really an odd couple? They are both iconic, instantly recognizable brands. The swoosh has taken on the cache of Coca-Cola in recent years, and even a 15-year-old boy would recognize Blue Cross, though he might not know what it does.

CATEGORY LEADER	CATEGORY	WBI	MPA	PURPOSE
Delta	Airline	81	31%	39%
Nike	Athletic Wear	90	50%	54%
Auto: BMW	Auto: Highline	84	50%	54%
Toyota	Auto: Midline	81	33%	52%
Garnier Fructis	Beauty: Haircare	82	31%	46%
Fenty	Beauty: Makeup	85	43%	64%
Coca-Cola	Beverage	81	38%	38%
Planet Fitness	Fitness	82	42%	63%
Doritos	Food/Snack	85	43%	38%
Aldi	Grocery	79	38%	52%
Blue Cross	Health Insurance	85	37%	54%
IKEA	Home Decor	84	38%	53%
Fidelity	Investment Services	84	37%	48%
Amazon	Large Retailer	85	52%	43%
Pizza Hut	Restaurant: Fast Casual	79	33%	38%
Chick-fil-A	Restaurant: Quick Service	79	32%	57%
Netflix	Streaming Service	81	47%	39%
Calm	Wellness	84	46%	78%



Here are five themes from our 2022 research with big implications for the years ahead.

1.

WHOLE BRAND THINKING™ IS SYSTEMS THINKING.

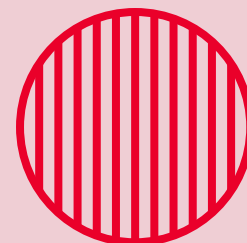
Brand managers first discovered the power of brands by managing them as icons — symbols that stood for ideas that motivated people. As that era lost its luster when the media system fragmented, brand experience became the defining modus operandi of running a brand. Today, a systems approach to brands is a more powerful strategy. It looks at interconnections between all the ways a brand touches someone, not just a linear flow of messages via campaigns or platforms. The Whole Brand Model is the most exhaustive diagnosis we can bring to the dynamics of brand power, but the payoff is worth the effort. Its critical metric — the Whole Brand Index — correlates 70% to how a brand performs in the consumer marketplace.

2.

THE STRONGEST BRANDS ARE THOSE THAT ARE THE MOST CONSISTENT.

Our model considers brands across five dimensions of its behavior: product, workforce, experience, design system and communications. These are the components of what we call the Whole Brand Index. We calculated the standard deviation of each brand's WBI by examining the variance of all of these dimensions at the respondent level. So we don't merely calculate standard deviation among five variables, but among hundreds of individual respondents. We then calculated each brand's coefficient of variation (CV) by dividing its SD by its mean WBI.

The R2 correlation between the CVs for all 126 brands and their Market Performance Averages (MPA) is 69% — the same high level as the



R2 correlation between WBI and MPA. CV is a measurement of volatility. The lower it is, the more predictable a brand's behavior. Investors use CV to find investments with reliable, steady returns.

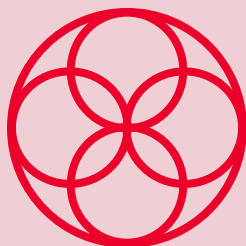
The best-performing brands in our study in terms of WBI — think Nike, Blue Cross, Amazon, Fenty, and Doritos — have less than half the volatility of brands in the lowest quintile. Less volatility also suggests greater discipline, and a more focused sense of purpose.

This is important for brand managers who are looking for effective growth strategies: Putting disciplined testing into place is revelatory and useful for guiding a brand into a successful, long-term future.

3. RELEVANCE DEMANDS ACTION.

Thanks to decades of brilliant work by David Aaker and his colleagues, brand relevance has won a rightful place in the pantheon of brand equity elements. In our Whole Brand Model, consider all five dimensions of brand behavior as pathways for establishing relevance to consumers.

Traditional marketing, which lives and dies through performance in a funnel, can too easily fall into the trap of inaction in the face of change. Why? Because it's a way of thinking too reliant on lagging indicators. "Did my latest campaign work?" If you measure your brand by communication results, not by its encompassing impact, you miss the bigger picture.



4. AVAILABILITY REQUIRES TOTAL COMMITMENT.

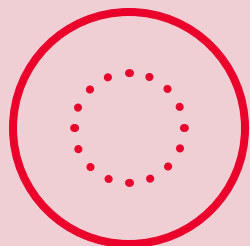
Availability is the other strategic imperative that has infiltrated the contemporary marketing ethos, thanks to the breakthrough work of Byron Sharp. From a whole brand perspective, we could not agree more with its importance. We simply offer this corollary to Sharp's theory: a whole brand approach is the surest way to achieve it. Don't look at availability as a function of media saturation and distribution channel dominance. Look at it as the by-product of fully orchestrated brand, where every action affirms a compelling central idea. In short, the way to run your business is to run your brand with an all-in commitment.

5. WHOLE BRAND THINKING™ BRINGS ORDER TO THE MARKETPLACE.

Markets are chaotic, with far more variables than constants. Consumers are bombarded with messaging they steal themselves to ignore. That doesn't, however, mean it is unreachable. One of the clear narratives emerging from our research is that brands in the upper tiers of the Whole Brand Index have huge advantages over weaker performers. They repeatedly win penetration and

preference battles. Traditional brands reliant on a conventional "trip through the marketing funnel" find themselves at a disadvantage when they compete against disciplined whole brands.

Whole brands also create bigger, more purposeful narratives than more fragmented ones that live and die in a funnel that's pre-designed to shrink its market. Whole brands are built for growth, for expansion, for reaching every possible need consumers may have.

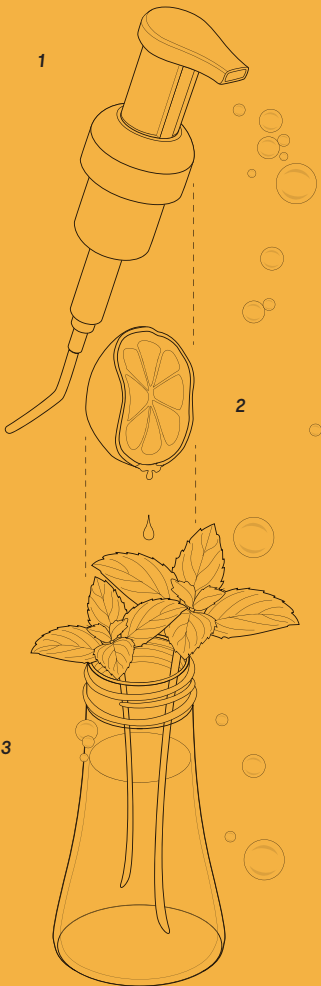




HOW TO BUILD
A WHOLE BRAND

ERIC
RYAN

Co-Founder of [method](#), OLLY, Welly + Cast



So much of creating a whole brand is to make sure you have a consistent experience through every touchpoint. Everything is theater. Few do it well because they forget to think about how you create a unified experience through products, sales, marketing, culture, all the way. We live in a world that’s much more porous for consumers and brand relationships. There’s no longer a public face and private face for a brand. That’s why you have to be authentic from the inside out.

Most brands struggle because they’ve gone from a couple of key touchpoints to thousands. To do that well, you have to bring creators in-house. That’s a hard soul to outsource. Put creatives and experience builders in leadership positions. Most brands are not structured like that today.

And my argument is to do all of that well, you need to have creativity in a leadership position. We live in a world where strategy drives creative, and I’m a huge believer that creative can drive strategy. Design thinking is at the heart of my brands.

1.
NAIL IT BEFORE
YOU SCALE IT.

Create a profitable business model before you go into scale mode. We roll out products by focusing on just one retailer. We prove it there before we take it to other retailers. We break things into bite-size steps.

2.
BELIEVE
EVERYTHING
STARTS WITH
CULTURE...

...and your products are a souvenir of your culture. At the end of the day, ideas are easy and execution is hard. And great execution is only going to be delivered by great teams and great culture. Put your ego aside, hire people greater than yourself, empower them and give them space. If we can get the culture right and products right, then everyone is pointed in the right direction for success.



Whole brands lead
with creativity
before strategy.

3.
BRING TOGETHER
ARTISANS AND
OPERATORS.

Think of brands at their best, like Apple’s Tim Cook and Steve Jobs or Gap’s Mickey Drexler and Don Fisher. I love a good dynamic duo of artist and operator. I’ll often bring in a great COO as my operating foil, but then populating that inside the company and bringing the creative director to sit as a peer to the CFO, and then bringing as much in-house as possible of the people that create that front of house.

4.
MAKE DESIGN
MATTER.

Design is the most impactful way to build a brand. Seeing is believing. You can immediately change perceptions instantly through great design and creative presentation. Great design amplifies everything. Great design makes the product the ad in everything you do.

5.
SET A CLEAR
BRAND RHYTHM.

I want to create brands that have incredible creativity and innovation, but that run predictably. I’m a big believer that if there’s enough discipline in place, it creates more freedom for more innovation. There are so few brands in the world that are incredibly creative and innovative that also run a really predictable business.



WHOLE BRANDS IN ACTION

INSPIRATION FROM 2022

IMPORTANT NOTE:

One of the tenets of The Whole Brand Project is to include each brand's purpose statement to show how a whole brand's actions are always rooted in a core idea or purpose, otherwise they run the risk of being one-offs creating noise but not equity.

The following section includes meaningful data and real-world ideas brands have created along the Whole Brand Spectrum, from marketing ideas to business ideas...

and all the ideas in between.

Whole Brand Spectrum

Business Ideas

Inside



Marketing Ideas

Outside



SUSTAINABILITY

YOUR BRAND’S IMPACT ON PEOPLE, COMMUNITY AND THE PLANET.



PEOPLE

KEY STATS FROM 2022



High-growth brands are 1.9 times more likely to have DEI-related talent objectives than negative-growth brands.

Deloitte



Employees are between 8-9.5 times more likely to work for an organization that demonstrates a commitment to human rights, health care access, economic inequality, gender equality and/or climate change.

Edelman 2021 Trust Barometer

2022 BRAND EXAMPLE



Purpose
Design for the good of humankind.

Diversity In Design Collaborative
Herman Miller launches the diversity in design collaborative to take meaningful action to increase diversity in the design industry. Its members, including other powerful design-led brands like Levi Strauss, Fossil, Dropbox, Adobe and Vans join forces around commitment to improving representation of black creatives in design, increasing design career opportunities and focusing on the education pipeline to create long-term and lasting change.

COMMUNITY

KEY STATS FROM 2022



41% percent of millennial investors put a significant amount of effort into understanding a company’s CSR practices, compared to just 27% of Gen X and 16% of baby boomers.

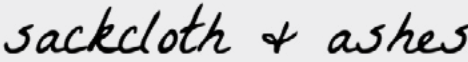
Aflac CSR study



Brands communicating their commitment to doing good and examples of actions taken saw a 25% increase in the number of job applicants.

Planet Money

2022 BRAND EXAMPLE



Purpose
To blanket the United States.

A Mission with a Brand
Sackcloth & Ashes is both sustainable and socially conscious. Its blankets are made of 100% recycled material and an eco-friendly wool blend. For every blanket sold, the company donates a blanket to a homeless shelter in the buyer’s zip code, helping customers make a direct impact in their communities. Sackcloth & Ashes hopes to donate 1 million blankets by 2024.

PLANET

KEY STATS FROM 2022



70% say that companies’ diversity and climate views have become more important to their job search.
BCG, 2021



2/3 of consumers want brands to help them live more sustainably.
Barkley/Jefferies Purpose Action Gap Study, 2021

2022 BRAND EXAMPLE



Purpose
To advance human rights and dignity, support social and economic justice for historically marginalized communities, and protect and restore the Earth’s natural systems.

Cow Burps
Ben & Jerry’s is cutting the carbon footprint of their ice cream. With more than half of the company’s carbon footprint coming from its dairy ingredients, Ben & Jerry’s is working to cut carbon emissions from cow burps. Yes, cow burps. Their cows will begin eating a small amount of red seaweed which will decrease carbon emissions by more than 80%. We wonder how soon red seaweed will become a flavor?

CULTURE

THE SWEET SPOT WHEN WHAT YOU DO AND SAY ON THE INSIDE MATCHES WHAT YOU DO AND SAY ON THE OUTSIDE (AND VICE-VERSA).

KEY STATS FROM 2022



Company culture was 10.4 times more likely to predict employee attrition than compensation.
MIT Sloan School of Management



The #1 trust driver for employees is the CEO manifesting company values.
Edelman 2021 Trust Barometer

2022 BRAND EXAMPLE



Purpose
Make work life simpler, more pleasant and more productive.

Work hard and go home
Slack uses the mantra ‘work hard and go home’ to build a culture that affirms the equal importance of both employee working and personal lives. They practice what they preach with a maximum 6-8-hour employee productivity window.

PRODUCTS + SERVICES

WHAT YOU MAKE AND WHAT YOU DO — THE MORE INNOVATIVE THE BETTER.

KEY STATS FROM 2022



In 2021, innovation as a top 3 priority jumped 10 percentage points from 2020, the largest year-over-year increase in 15 years of research.
BCG, 2021



20% higher average valuation multiple for companies that innovate across both new and core markets.
BCG, 2021

2022 BRAND EXAMPLE



Purpose
To create a better everyday life for the many people.



Purpose
Inspire and develop the builders of tomorrow.

Two Whole Brands Unite Over Design
We love smart brand partnerships, so when IKEA® and LEGO® teamed up to create a range of simple storage solutions for kids and adults, we loved it. The inspiration? Play, of course!

DESIGN + EXPERIENCE

THE ART AND SCIENCE OF GUIDING PEOPLE THROUGH YOUR BRAND’S EXPERIENCE VISUALLY, VERBALLY AND SYSTEMATICALLY.

KEY STATS FROM 2022



Building a modern, successful design department is one of the four actions a CEO can take to drive revenue growth at twice the rate of industry peers.
McKinsey, 2022



Designers might add as much value redesigning your company as they do designing your products, services or experience. In fact, the best design-integrated companies were three times more likely than their peers to deploy their design teams for tackling internal issues.
McKinsey, 2022

2022 BRAND EXAMPLE



Purpose
Keep New York moving.

MTA’s Live Subway Map
Navigating the complicated New York subway system is made even more difficult with static maps that combine lines into singular trunks. Combining informational clarity and geographic literality, the new digital map is a live entity that shows travelers where they’re located in the city at any given time and the trains running on the lines in real time.

*winner of Fast Company’s 2021 Innovation by Design Award

Note: We highly encourage all brands to read the recent McKinsey study on the power of Design. The benefits they point out from integrating Design into your whole brand are twofold: It ensures designers are engaged with the core needs of the business, and it also allows designers to share their approach and point of view (“design thinking”) across the company to encourage better problem-solving. Brands that have successfully integrated their design teams don’t simply see financial rewards, including revenue growth, increased share price, and overall profitability; they also score better in trickier metrics, such as employee satisfaction, environmental and social impact, innovation, adaptability to COVID-19, user-centricity, and innovation.

RED THREAD

THE CORE, LONG IDEA AT THE CENTER OF THE BRAND, GUIDING AND INSPIRING ALL BRAND ACTIONS.

KEY STATS FROM 2022



9 in 10 people said they valued brands that had a strong sense of self.
Twitter #RealTalk Report



Brand consistency, giving your customers a reliable experience consistent with your core idea, boosts average revenue by 23%.
Local IQ

2022 BRAND EXAMPLE



Purpose
We exist to transform people’s daily lives with water.

Power Lasting Change
The long unifying idea that sits at the center of the brand and guides everything it does inside and outside. For Delta Faucet, it’s to make a meaningful, lasting impact on people’s space, day and world.

PURPOSE

WHY YOUR BRAND DOES WHAT IT DOES, BEYOND MAKING MONEY.

KEY STATS FROM 2022



93% of high-growth brands, those with 10% or more annual growth, indicate that they have established KPIs related to their purpose statement.
Deloitte



High-growth brands are 66% more likely to see purpose as a means to guiding employee decision making.
Deloitte

2022 BRAND EXAMPLE



Purpose
Reshape the digital economy so everyone — individuals, financial institutions, governments and businesses — can realize their ambitions.

Financial Inclusivity
Mastercard has created a tactile solution, known as the Touch Card, for the visually impaired to better recognize their payment cards. Additionally, Mastercard offers trans people the option to use their chosen name on their credit card without requiring a legal name change.

ACTIONS

STANDS A BRAND TAKES FOR OR AGAINST SOMETHING.

KEY STATS FROM 2022



Nearly six in 10 say their default tendency is to distrust something until they see evidence it is trustworthy.

Edelman



A word-of-mouth marketing impression results in five times more sales than a paid media impression and people are 90% more likely to trust and buy from a brand recommended by a friend.

Invesp

2022 BRAND EXAMPLE

TONY’S CHOCOLONELY®

Purpose

To make 100% slave-free chocolate the norm.

Tony’s Is Not Always So Sweet

Tony’s Chocolonely boldly recreated their packaging to create “look-alike bars” that resemble four of the biggest chocolate brands in order to draw attention to the fact that 20 years ago, the industry had promised to irradiate child labor but it still runs rampant. Each wrapper has a link to a petition to call out the cocoa industry’s failure to address many human rights issues.

PR

THE ACT OF PROTECTING AND PROMOTING A BRAND’S REPUTATION THROUGH RELATIONSHIP BUILDING AND STORYTELLING.

KEY STATS FROM 2022

Earned media coverage is seen as more credible and trustworthy by most audiences and less likely to be skimmed or muted.

Forbes



89% of people most trust recommendations from people they know and word of mouth.

Marketing News Canada

2022 BRAND EXAMPLE



Purpose

To create a world where anyone can belong anywhere.

Airbnb for Ukraine

By truly living their purpose, Airbnb stepped in to aid more than 10,000 Ukrainian refugees by offering short-term housing. Many users are using Airbnb as a donation platform in order to provide temporary shelter for refugees. Another innovative way people are helping Ukrainian citizens is by making false reservations in Ukrainian cities, in order to get money to hosts quickly.

CONTENT

BRAND COMMUNICATION PEOPLE CHOOSE TO SPEND TIME WITH — MORE PULL, LESS PUSH.

KEY STATS FROM 2022

\$100 billion

After barely a decade in existence, the creator economy already boasts an estimated value of over \$100 billion. And 50 million people around the world consider themselves to be content creators, curators or community builders.

Influencer Marketing Hub, Signal Fire

In 2021, almost every major social network introduced features to help creators monetize their work, or funds to pay them directly.

HootSuite 2022 Social Trends

2022 BRAND EXAMPLE



Purpose

To leave the light on for those who stay at and work at Motel 6.

Motel 6's social becomes the first budget-friendly travel guide.

The travel lifestyle today is defined by stories of luxury and adventures abroad ... which is unattainable and irrelevant to the majority of budget travelers who stay at Motel 6. Open Road is the solution, a digital magazine by Motel 6 for economy travelers. Published on M6's social channels and blog, Open Road shares human interest stories and budget-friendly travel tips that shine a light on our guests and employees and celebrate the economy way of travel.

ADVERTISING

ANY COMMUNICATION THAT EXISTS IN A PAID MEDIA ENVIRONMENT.

KEY STATS FROM 2022



A large majority of people don't mind being sold to on social media as long as the ads are entertaining and meaningful.

Twitter #RealTalk Report

Airbnb reported its strongest-ever fourth quarter results after shifting from a performance-based marketing approach to a brand-building marketing strategy.

Marketing Week

2022 BRAND EXAMPLE



Purpose

Celebrate, support and add to running's distinct running class culture.

The Last Interval

We love the Tracksmith advertising because it does what all advertising should aim for, to be “a benefit of the product,” something to look forward to and make the product more valuable. The ads run in real track-lover contexts and feel like an extension of the content, by showing real runners, with a grassroots feel, almost in real time and narrated by the supreme track nerd, Malcolm Gladwell.



HOW TO BUILD
A WHOLE BRAND

NIKI
KING

Head of Sustainability, [Unilever North America](#)

The business is run efficiently and maximizes shareholder value. The company culture is one that allows employees to realize their individual purpose, yet creates an atmosphere of “one team” where employees are also working to achieve common goals. It holds its suppliers to a high set of expectations and works with them to meet those expectations. It provides a quality product or service. And, most importantly, it makes a positive impact in the world.

A brand is whole when it takes into account every person that will be impacted along the value chain — including shareowners, employees, suppliers, workers in the supply chain and consumers. The business is ethical, profitable and well-governed, and it positively impacts the world.

A brand is not whole when it doesn’t live into its values. There is dysfunction and conflict within the company. It doesn’t have a clearly defined purpose. It does not strike a balance between people, purpose and profit.

The brands that are doing it right are those that are incorporating Sustainability/ESG into their overall business strategies. They understand that Sustainability/ESG should not be a stand-alone strategy separated from the business strategy.

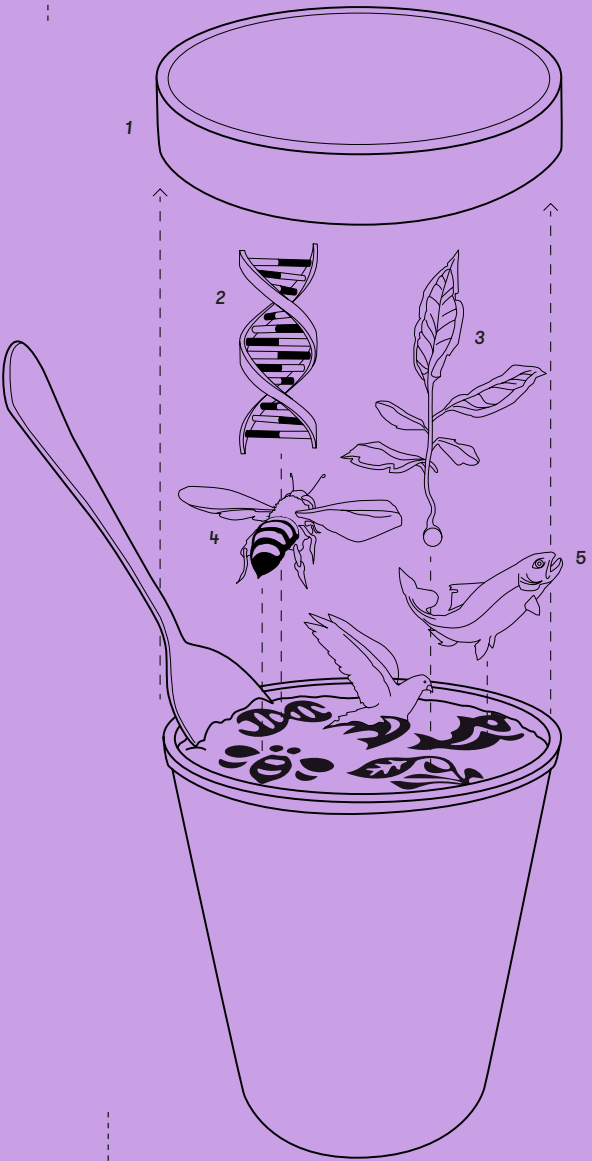
1.
HAVE AN
IMPACTFUL
AND CLEAR VISION
AND PURPOSE.

3.
BUILD A RESILIENT
SUPPLY CHAIN.

2.
BUILD A CULTURE
WHERE EMPLOYEES
BELIEVE IN THE
PURPOSE AND ARE
ACCOUNTABLE FOR
BRINGING IT TO LIFE.

4.
LEVERAGE ITS
BRAND POWER
TO MAKE A
POSITIVE IMPACT.

5.
ENCOURAGE
OTHER BRANDS TO
FOLLOW SUIT.



“

Whole brands are
those we can trust.



HOW TO WIN BY IGNORING THE MARKETING FUNNEL

IT'S TIME TO RETHINK MARKETING ORTHODOXY.

There are two kinds of brands. One we'll call "funnel brands" and the other "whole brands." Funnel brands use the linear measurement of the marketing funnel to guide and track what they do. They focus their efforts on traditional communications, investing millions into actions to increase awareness and the probability of conversion.

Whole brands pay little heed to the funnel. Instead, they orchestrate all their actions across multiple brand dimensions, recognizing that consumers don't follow an orderly path from awareness to loyalty. Whole brands make themselves available in any way possible.

For the past three years, we have conducted consumer research on scores of brands to understand what it takes to achieve elite status in our most unusual era. And we made two important discoveries. First is that there is a small group of

brands, including iconic legacies and fresh upstarts, that have clear and distinct advantages over all others. The second is that the model underlying their success, which is based on a metric we call the Whole Brand Index, has the power to predict market performance.

Today's most powerful brands win the availability wars by reaching their customers more effectively than competitors. Consumers don't live in funnels. They live in a chaotic marketplace governed by endless choices. Whole brands, especially ones driven by higher purpose, rise to the top by being there for them at every turn.

Armed with this knowledge, whole brands will continue their dominance in the years ahead. Cling to the old ways and languish somewhere in an obsolete funnel.

HERE'S HOW:

1. TAKE YOUR BRAND OUT OF THE BOX.

2. LOOK AT IT FROM EVERY POSSIBLE ANGLE.

3. EXCEL AT EVERYTHING.

Whole brands excel at all dimensions of brand action, not just product and communications.

Consumers encounter them as encompassing experiences, making it possible for digital-first brands like Away and Booking.com to perform like Amazon, Nike, and Coke.

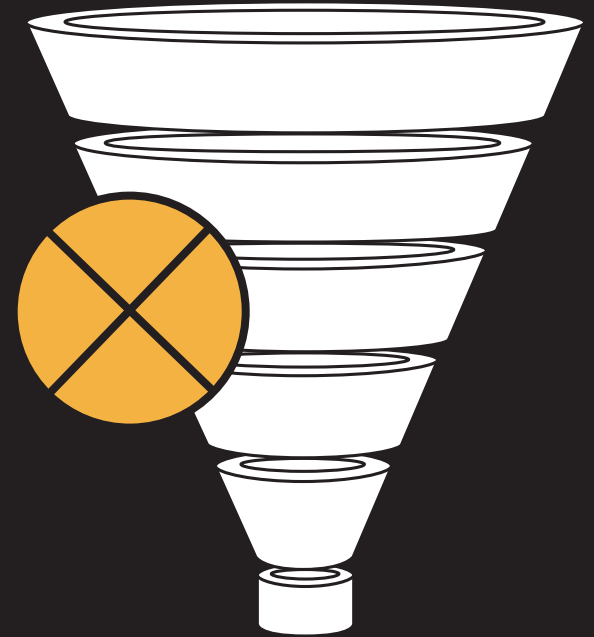
4. WIN THE MARKETPLACE.

Whole brands achieve a high level of business results based on widely agreed-upon metrics.

Whole brands' market penetration over the last 12 months is 44% greater on average than all other brands, and they are the preferred brand in their categories 73% more often.

5. LEAD WITH PURPOSE.

Consumers see these brands as standing for more than making money. Tesla is obvious — but Gatorade did purpose before purpose was cool. Brands with purpose have an intangible momentum, which shows up in the data.



“

There will always be people who are ahead of the curve, and people who are behind the curve. But knowledge moves the curve.

— Bill James, godfather of Moneyball

This piece is an adaptation of *How to win by ignoring the marketing funnel: A new model of brand dominance* by David Gutting, WARC, January 2022.



HOW TO BUILD
A WHOLE BRAND



HILARY BUTLER

Director of Marketing, [Bonterra Organic Estates](#)

Put simply: a whole brand is the intersection of knowing what you’re good at and what the world needs – in other words, a whole brand is centered in purpose.

A brand is whole when every function, attribute and individual tied to and across the organization (across the supply chain, PR, marketing, HR, sales, etc.), not just the commercial team, embodies the brand purpose and brand values. Part of our whole brand is how we show up and how we operate — enlisting change agents on a collective path forward.

A brand can’t be whole if only one function, or one component of the brand, functions as the leading agents to determine how the brand is represented to consumers and customers alike. Unless all of those serving the brand represent the values of the brand in their actions and their objectives to move the brand forward, the brand cannot be considered whole.

Whole brands co-create with all of their stakeholders. By being fully transparent about our climate-smart business practices, we pull the consumer into the campaign to fight climate change and give them an easy way to affect change.

“
Whole brands
inspire change
agents everywhere.”

1. UNDERSTAND THE IMPACT YOUR BRAND HAS EVERYWHERE.

Across the environment, people (society and internal stakeholders), and the industry with which you serve.

2. MAKE YOUR IMPACT AS BIG AS IT CAN BE ACROSS YOUR ENTIRE BUSINESS MODEL.

Align your impact strategy across packaging, production, waste and, even, consumer awareness tactics, making sure you are aligned in everything you do.

3. MAKE IT MEASURABLE.

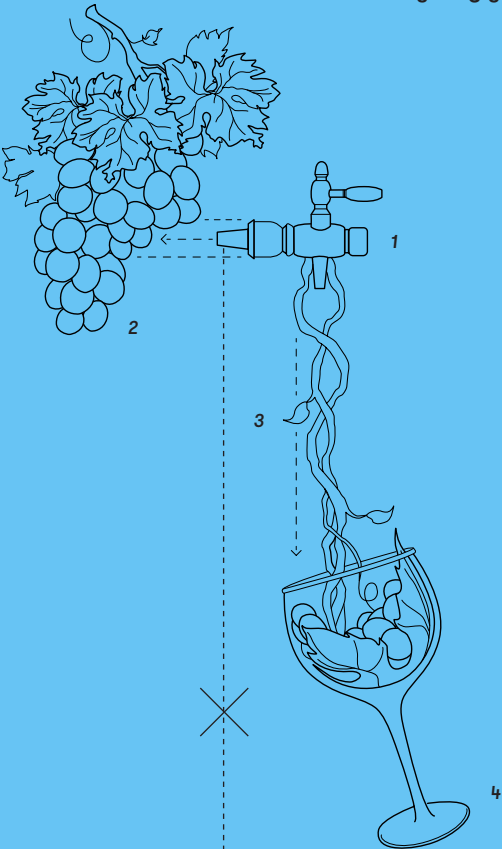
Clearly outline what measures and KPI’s align to driving your whole brand to those key impact pillars you noted — whether it be a people impact like company surveys or brand health measures — to supply chain impact, like reductions in waste. This drives accountability and meaningful change across the entire network of the brand.

4. MAKE IT CLEAR.

Effectively communicate the impact, measures and tactics across your entire organization so that all stakeholders are clear on what actions they need to take to embody the brand purpose.

5. MAKE IT ACTIONABLE EVERY DAY.

Whole brands are built on a daily basis across everything they do. Make sure everyone has the same overall “brief” every single day.





HOW TO RALLY THE TROOPS

by Tim Galles,
Director, The Whole Brand Project
+ Chief Idea Officer

HELP WANTED.

This is a rally cry, a call to arms, a late-night SOS.

A hail Mary and a hell yes.

Like no other time in our history, the world needs more whole brand thinkers: heroes of the new — but not normal — capitalism.

This is one of the greatest opportunities to put yourself to amazing and profound use and go beyond making stuff. Instead, design an entire brand. Reimagine and reinvent capitalism. Easy enough.

The Romans said: “To Know Truth. To Make Beauty. To Do Good.” Oh, is this what you do? I’ve been looking for you.

But what the hell is a whole brand thinker, you ask?

Great question. You’re a misfit, a creative and strategic generalist who sees a broad horizon but knows when and where to go deep. You’ve never paid attention to the rules set forth by the marketing-industrial complex, because you understand brand is not a construct of a company or organization.

It is a construct of real people, consumers, citizens and communities. A collection of heartbeats. Right. On.

You know in your own heart of hearts that a brand is really the memory in someone’s head made up of every experience they have had with it. That’s why Nike is one brand to you and another brand to me.

You get that a brand is not just some of the stuff a company or organization does, it is everything a company or organization does. Every single action, from the inside out. (You can thank today’s consumer demands for transparency for this.)

Historically, most companies think in fragments: Brands are merely the domain of the marketing department, spiritually silo’ed away from the congregation of products and business and operations. They’re seen as assets, something to be turned on and off, used in convenient but dangerous ways: as a verb. You know. Branding.

A whole brand says and does things on the inside that match the things they say and do on the outside. There is no party in front and business in the back. The party and the business work in tandem, everywhere, like Lennon and McCartney, Kahneman and Tversky. Key and Peele.

Brands-as-usual were broken long before the pandemic. Ad schools and MBA programs are turning out students that celebrate creativity but to what end? Doctors have the Hippocratic Oath. It is time for brands to have such a manifesto — a stance, a belief and behavior system that transcends “All is fair in love, war and money-making.”

Societies are increasingly polarized, and economic models work for only a few. Meanwhile, we face racism, populism, nationalism and other -isms popping up faster than Whack-a-Mole. We are at an inflection point, and we have a choice:

Pursue relentless growth, greater efficiency, the bottom line in a world where these practices are running into personal, social and planetary limits. Or dream bigger. Build something better, something softer, more social, more soulful, more regenerative. More memorable, meaningful. Useful.

Consumers deserve better.
Employees deserve better.
Communities and our very planet deserve better.

Knowledge — truth — is only a rumor until it lives in the muscle. Purpose without action is as cheap as talk. Fragmented brands don’t understand this like you do.

Is everyone a whole brand thinker? Of course not, but I have a sneaking suspicion that a whole bunch of people like you are looking for your thing, a way to make a bigger impact. To use your strategic brain and creativity to add good to what’s next — not just what’s now.

Will every brand respond to what we’re offering? No, but the alternative is frightening. Most brands will still see the brand the same way as they see their marketing folks, as creative weirdos sitting in a corner saying, “Trust me.” Most brands will perpetuate the marketing industrial complex, celebrating bad cheeseburgers with nonsensical hype and earworm anthems. That’s not innovation.

We need you. We need a collection of people like you to create a better future, to leave your mark on something more meaningful.

So here’s your moment: Let’s build a new kind of capitalism, one that doesn’t reward brands doing whatever it takes to be successful. Brands should actually add value to people’s lives — for consumers and employees alike, in ways that don’t deplete the Earth, in ways that matter more than neutrality.

It’s time for a version of reality where whole brands and whole brand thinkers rule.

Let’s go make that world.

This piece first appeared in *The Muse* by Clio.



HOW TO BUILD
A WHOLE BRAND

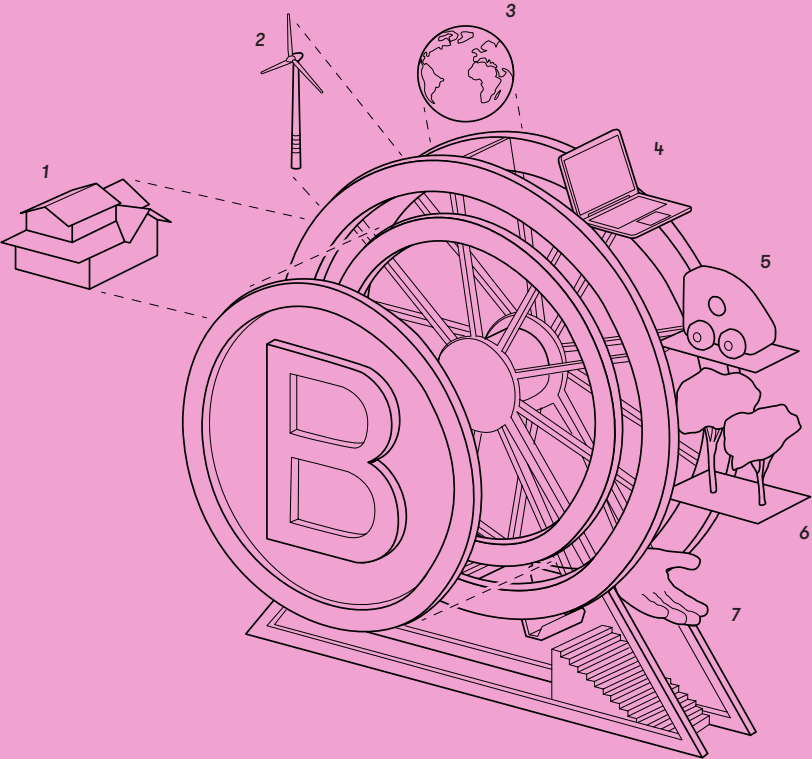
BART HOULAHAN

Co-Founder, [B Lab](#)



Whole brands are values-aligned, both internally and externally; as the brand scales, so do its values. There are no inconsistencies in the operations, product offerings or capital structure. Often, purpose-driven brands have elements of misalignment in their operations that threaten the integrity of the brand: an aberrant supplier, a rogue product, a demanding investor, a legacy division. These misalignments degrade a whole brand and its authenticity.

Being a whole brand must begin with corporate governance. If the corporate structure of an organization is misaligned with its mission, inevitably, in times of stress, the organization will revert to form and abandon purpose in pursuit of profit. The pandemic provided a clear proof point of this dissonance, as one self-declared “purpose-driven” brand after another abandoned their principles during the crisis. Those whole brands who have “gotten it right” have embedded a legal commitment to stakeholders into their corporate governing documents with meaningful legal accountability. As a result, they have baked purpose into the DNA of their operating system. What they measure and how they define success look different than traditional organizations.



1. REWRITE YOUR CORPORATE GOVERNING DOCUMENTS.

Include your mission and values, aligning your investors, board and executive team around a common purpose.

2. USE THE B IMPACT ASSESSMENT...

...or another impact measurement tool. Evaluate the impact of the business on all stakeholders and share that assessment transparently with your employees, board, investors, suppliers and customers.

3. DESIGN A MULTI-YEAR IMPACT PLAN.

Create an employee-led committee to generate a multi-year impact plan that directly reports to the board, with a clear reporting framework, aspirational targets and annual goals.

4. EMBED IMPACT-BASED INCENTIVES IN YOUR COMPENSATION STRUCTURE.

Connect incentives to your impact, aligning management and employees with the organization’s purpose and mission.

5. PROACTIVELY SCREEN CUSTOMERS AND SUPPLIERS FOR IMPACT.

Embed purpose throughout your entire value chain.

“
Whole brands
stay true to their
principles in
tough times.



HOW TO JOIN US

THE WHOLE BRAND PROJECT

We are on a mission to build more whole brands in the world. As this is a big and important initiative, we can't be the only ones working on it. If you would like to see how your brand fared or work with us, please connect with us. Or if you would like to join our Whole Brand Project, follow us on LinkedIn or Twitter. We want to inspire and equip as many change agents as we can to partner with us on our mission.

May the most whole brands win.

To learn more about the Whole Brand Project, contact Tim Galles at tim@wholebrandproject.com. [in](#) [t](#)

To better understand how your brand ranks on the Whole Brand Index, Barkley offers scalable versions of Whole Brand Assessments ranging from a complete inside-out look at your brand among internal and external stakeholders and against your competitive set. We also offer two-day Scratch Sessions that identify and prioritize opportunities, and align internal stakeholders on where to focus efforts.

For questions or inquiries about Barkley, please contact Jason Parks at jparks@barkleyus.com. [in](#) [t](#) [o](#) [f](#)



The
Whole
Brand
Project

wholebrandproject.com



To get your copy of this poster, email poster@wholebrandproject.com.

State of the Whole Brand 2022

