

OPINION PARTY

BELONGING



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BAV Group
We bring data to the
branding opinion party.™

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EDITOR'S LETTER



Welcome to the first issue of "Opinion Party" from BAV Group. As Chief Strategy Officer, I am excited to present our data-driven insights (and a few opinions thrown in for good measure) across a range of topics, threaded around the theme of Belonging.

BELONGING AS DESCRIBED BY CHATGPT:

'feeling connected to something larger than oneself, yet also feeling a sense of responsibility to that something. It's a feeling of being seen and understood, yet also of being vulnerable and exposed.'

With so much 'othering' happening in the world around us today, we aimed to create a collection of points of view that focused on embracing the unknown, trusting ourselves and others, and ultimately a body of work that helps us all to connect around topics that unite us rather than divide us.

Read on to see how our authors have taken their unique experiences and written informative and timely pieces on the intersection of brands and belonging in today's culture.

We hope you enjoy reading this, our very first issue, as much as the team enjoyed writing it, and that you gain valuable insights from it.

Warm regards,

Laura Jones

Laura Jones
Chief Strategy Officer, BAV Group

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"What's in a name? Embrace the weird!" by Aylin Yasa, a BAV Group Strategy Director, is a personal story that explores the importance of embracing one's uniqueness. Aylin shares her experiences as an immigrant in the US and how her name, which is common in Türkiye, became odd in a new cultural setting. Through her experience, Aylin highlights that having a unique name can be an asset for a brand, and she gives examples of some of the most beloved brands with 'weird' names.



Despite being the largest minority, people with disabilities are still underrepresented or ignored in marketing and advertising. In "The Power of Brands to Champion Accessibility," Jenna Rounds, Managing Director of Strategy and Insights at BAV Group highlights the need for brands to ensure that their products and services are accessible and inclusive for people with disabilities through inspiring examples and illustrates how our BrandAsset® Valuator can measure the impact of accessibility on a brand.

As the demand for non-alcoholic beverages continues to rise, brands can tap into changing preferences and build a more inclusive culture around drinking. In her article, Analytical Brand Strategist Dor Katz discusses the increasing popularity of non-alcoholic, zero proof, and booze-free drinks, and how brands such as Curious Elixirs, Athletic Brewing, Hella Cocktail Co., and Liquid Death are capitalizing on this trend. By doing so, brands can expand their pool of consumers and promote a sense of belonging.



In 'Bridging the Inclusion Gap,' John Keaveney shares the following groundbreaking data- A recent study by BAV found that 84% of UK consumers believe it's important for brands to promote diversity and inclusion, but only 19% of brands across four categories were associated with being inclusive. His piece explores this paradox and explains how understanding it is key to fostering a sense of belonging across all dimensions of diversity.

In 'Culture Shapes Brands and Brands Shape Culture,' Natalia Restrepo, discusses how brands and culture are intertwined, and how brands can become a powerful medium to connect people to a place and help them feel like they belong. Overall, the article emphasizes the importance of understanding the relationship between brands and culture to gain insights into a culture's beliefs, attitudes, and traditions.



What's in a Name? Embrace the weird!

Why "weird" isn't necessarily a bad thing when it comes to naming through personal experiences as an immigrant in the US and by looking at some of the most loved brands of today.

Aylin Yasa

Aylin Yasa is a Director of Strategy within BAV Group, where she creates brand narratives through data. She lives in New York and sometimes guest lectures at NYU.



My name is Aylin, a perfectly normal name in Turkiye, where I grew up. In Turkish, it means "lights surrounding the moon." The name that I really liked growing up suddenly turned into something "odd" about me when I came to the US. It went from being elegant to being easily forgotten, unpronounceable in coffee shops, and a name that people shied away from saying out loud in meetings.

I still experience some of this today, but instead of getting frustrated, I decided to take on a different approach. I started to embrace the fact that my name has a unique spelling for those who are not from Turkiye and that this can be a catalyst for an interesting conversation with someone about my name and my heritage. Suddenly, singing the chorus of "C'mon, Eileen" became the usual way of introducing myself, thus making an odd name stick. Owning the weirdness in my name and associating with a beloved American song enabled me to feel like I belonged in a culture that didn't feel familiar at all 12 years ago.

So, what does my name have to do with branding?

Let me tell you: Names are important and it's okay to have a weird name as long as you embrace it.

You don't have to look far to see that some of the most loved brands (according to BrandAsset® Valuator, the largest and longest-running study of brands globally) in fact have 'weird' names. Google isn't even a real word, but we use googling so much that it was officially added as a verb into the Merriam-Webster dictionary in 2006¹. Verizon is a word that created from the combination of veritas and horizon². IKEA is named after the initials of its founder, the farm where he grew up, and the nearby village³. The list goes on and on.

A weird name doesn't sound so bad now, right? Sometimes the weirder the name, the stickier it can be – which can create a distinctive asset for your brand. So, think hard about the name of your next brand, product, slogan. You can take a page from the book of beloved brands with weird names as, despite their unusualness, they were able to carve out a strong presence in people's minds, daily conversations and truly belong in culture.

I AM NOT
WEIRD
I AM limited
EDITION

1) "Google Added to Merriam-Webster Dictionary.", www.CIO.com, July 07, 2006, <https://bit.ly/3pR8X4t>

2) "Verizon Selected as New Name for Combination of Bell Atlantic and GTE", Verizon, April 03, 2000, <https://bit.ly/3MyZY0C>

3) "The History of IKEA", about.ikea.com, <https://bit.ly/3BAeTRI>

The Power of Brands to Champion Accessibility

Do you know what population makes up the largest minority in the world? It's people with disabilities and we, as marketers, are doing a poor job being inclusive of this underserved group.

Jenna Rounds

Jenna is a Managing Director of Strategy and Insights at BAV Group, a VMLY&R brand consultancy. She has a passion for decoding human behavior and has helped build some of the world's most renowned brands.



Despite recent improvements in the representation of people of various racial and ethnic origins in marketing and advertising, people with disabilities are still frequently underrepresented or even completely ignored. According to the World Health Organization, over one billion people worldwide have some form of disability, or approximately 15% of the global population, making disabled people the largest minority. In the United States alone, one in four adults has a disability. True inclusivity doesn't start with marketing—it's embedded in the development of products and services.

With such a significant portion of the population being affected by disability, it is crucial for brands to ensure that their products and services are accessible and inclusive. There are inspiring examples of brands that have adapted their products for people with disabilities, like Microsoft's Xbox Adaptive Controller, Nike's FlyEase easy on-and-off sneakers, and Ikea's free 3D printable add-ons to make its furniture accessible to people with disabilities. Clothing designers have also begun to embrace people's differences. Tommy Hilfiger was one of the first brands to feature an adaptive clothing line, and now JCPenney, American Eagle and Target have joined in. Technology brands like Samsung and Google have developed features to be more accessible to people with visual impairments.

With BrandAsset® Valuator, we can measure the impact that inclusivity has on a brand. In an analysis of the most inclusive brands in the US, we found that the top 10% are seen as more innovative, visionary, caring and helpful. They are considered more differentiated from other brands, drive stronger advocacy, and get people more emotionally connected. And that translates to the bottom line – people are more behaviorally committed to using inclusive brands, translating to a 40% greater future brand value.

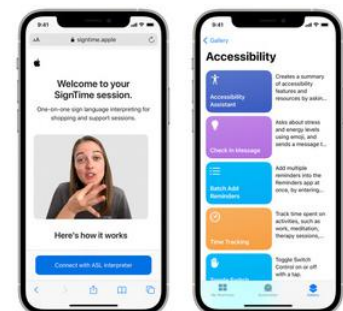
Highlights from Most Inclusive Brands 2022

Source: BAV All Adults USA Full Year 2022. Most Inclusive Brands defined as top ranked in Progressive, Socially Responsible and Committed-to-Inclusion. Analysis of top 10% vs bottom 10%.

Birds Eye: committed to workplace programming around disability education and awareness, as well as collaborating with charitable organizations to increase understanding of consumers with disabilities.

Fenty: authentically inclusive, creating products that cater to needs of people of all sizes, skin tones, ages, and genders.

Apple: celebrates assistive features and functionality to its products designed to make its products adaptive and accessible.



Apple Assistive Technology

There's still a long way to go because many products and services are still not inclusive of people with disabilities. Brands have the opportunity – even the responsibility – to ensure that people with disabilities aren't left out, that they have equal access to all that life/society has to offer.

The Path to Belonging Requires Zero Proof

Non-alcoholic, zero proof, and booze-free beverages are on the rise. With consumer interest growing, brands have the opportunity to tap into changing preferences and build a more inclusive culture around drinking.

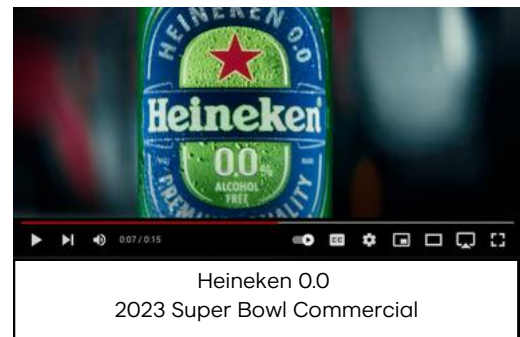
Dor Katz

Dor Katz is an Analytical Brand Strategist with BAV Group. She is passionate about research and data to create insightful branding strategies that help clients shape their business and purpose.



Over the past few years, searches for “zero proof”, “non-alcoholic”, and “alcohol free” have been steadily increasing. The growing demand for non-alcoholic options appears to be driven by many factors including consumers seeking healthier and hangover-free drinking choices. With interest growing, Curious Elixirs, Athletic Brewing, Hella Cocktail Co., and Liquid Death are among the many brands that have capitalized on this trend, bringing a new generation of non-alcoholic beverages to the masses.

The low- and nonalcoholic category value surpassed \$11 billion in 2022.¹ In a true display of widespread adoption, this year’s Super Bowl featured a “Heineken 0.0” ad for Heineken’s zero proof, non-alcoholic beer.² This beer is joined by Budweiser Zero, Stella Artois Liberte, and Guinness 0 – in the race to add these offerings to traditional alcohol brand rosters.³ Booze-free and mocktail bars have also started popping up to cater to the “sober-curious” – including NYC spots Hekate and Kava Social. These places help consumers feel that they don’t have to drink alcohol to have a good time.



What does this preference shift say about people’s priorities, and how can brands participate? Whether it be for religious beliefs, personal preference, or health concerns – there are plenty of reasons to not consume alcohol. The percentage of American adults who abstain from alcohol is estimated at a whopping 36%,⁴ with a reported 15% participating in ‘Dry January’ in 2023.⁵ These consumers are on the search for worthy options to fit their needs. We find - in BAV data, that within the Beer, Cider, and Hard Seltzer category – commitment to inclusion is correlated with emotional commitment to a brand.

With this sizable and growing market, the need for premium non-alcoholic options is increasingly important. Brands can be part of the movement to break down barriers and create a more inclusive culture around gatherings and meal occasions that include non-drinkers, promoting their products to a wider audience and expanding the pool of consumers who feel like they belong. This step can allow everyone to socialize without judgment and opt out of drinking alcohol without facing negative stigma.

Consumers appreciate brands that help them feel like they belong, and by tapping into zero proof – brands can do just that.

1) “No- and low-alcohol category value surpasses \$11bn in 2022”, IWSR, December 2022, <https://bit.ly/3WBcikf>

2) “Ant-Man and Heineken Join Forces in First Super Bowl Commercial for Non-Alcoholic Beer.”, Forbes.com, Feb 6, 2023, <https://bit.ly/3owHSml>

3) “Buzzless Boom”, Market Watch Magazine, August 29, 2022, <https://bit.ly/3MWrbdZ>

4) “What Percentage of Americans Drink Alcohol?”, Gallup, December 29, 2022, <https://bit.ly/3BTDFMZ>

5) “Dry January Participation by Age U.S. 2021-2023”, Statista, Jan 16, 2023, <https://bit.ly/3oupyKZ>

Bridging the Inclusion Gap

How brands need courage to match the consumer desire for inclusion with the reality they experience

John Keaveny

Global Managing Director of Analytics & Insight. Over 20 years of experience consulting brands as well as politicians



In a 2022 BAV study into the role ethnicity has on brand perception, it was found in the UK that 84% of respondents agreed with the statement "It's important for brands to promote diversity and inclusion". It was also revealed that 83% agreed that "brands should make more of an effort in understanding different ethnic groups".¹

Now, these are very significant figures, but how does this clear consumer need measure up to perceived experience? The answer is sadly not very well at all.

Our data reveals that brands across four categories – beauty, finance, retail, and food & drink -- only achieved an average 19% association with the attribute 'Inclusive'. This contrasts with an average of 21% for 'Treats Customers Equally', and 25% with 'Helpful'. To give some broader context, a trait like 'Good Value' averages 30% for a brand in this study.

This not only shows the perceived gap between the desire for inclusivity and the reality experienced, but also an apparent lack of understanding on how to deliver on true inclusion; something that goes far deeper than just how you serve your customers.

A brand that has successfully closed the "Inclusion Gap" is Fenty. Launched in September 2017, it has quickly gone on to become a business estimated to be worth at least \$2.8 billion,² and has clearly disrupted the beauty category.

It is inclusive not just in its words, but also in its actions by delivering an extensive product range for all skin tones, while also being gender neutral, vegan, and cruelty-free. But what is arguably more interesting is the mindset that consumers have additionally attached to Fenty.



Across all minority ethnic respondents we studied, Fenty was seen as the most 'Courageous' brand we tracked (achieving still a strong 2nd place in the minds of white respondents). This is interesting as it goes beyond just daring to be different but is more about a call to arms. In fact, our study showed that 'Courage' was typically the weakest association of any brand, with an average attribution of just 9.6% (versus Fenty's cross-ethnicity average of 17.4%, and a high of 21.7% amongst black respondents).

Fenty demonstrates that being inclusive is not just a good thing for society but is also great for business too. It also gives us clues towards the mindset that brands need to adopt as well, as being courageous in all that you do is still a rare commodity within the world of branding but can reap dividends when authentic.

1) "WPP's Consumer Equality Equation Report", WPP, November 2022, <https://bit.ly/wppequality>

2) "Fenty's Fortune: Rihanna is Now Officially a Billionaire", Forbes, August 2021, <https://bit.ly/forbesfenty>

CULTURE SHAPES BRANDS AND BRANDS SHAPE CULTURE

Brands say a lot about the culture, and culture says a lot about the brands. Exploring the interconnections can teach us about identity and inclusion.

Natalia Restrepo

Natalia is a Director at BAV Group. She is a Latin American mind passionate about understanding cultures, people's minds, and behaviors. With a structured yet creative approach, she brings a unique perspective to the conversation.



Brands and culture are intertwined. It's common to relate McDonald's to the United States, Bimbo to Mexico, Samsung to South Korea, Chanel to France, and BMW to Germany. Brands become part of the cultural identity and can be a powerful medium to connect people to a place and help them feel like they belong. That's the beauty of branding the ability to evoke feelings, emotions, and ideas in people's minds.

As a Colombian, I see brands like Juan Valdez, Alpina, Colombiana, Noel, Ramo, El Éxito, Crem Helado, Arturo Calle, Jet, and Aguila and immediately taste, smell, and feel at home. My relationship with those brands transcends functionality. Yes, they are high-quality brands, but the reason behind that affection is more emotional than rational. At BAV Group, we study the cultural role of brands and how people relate to them. These Colombian brands are in the top 10% of the relevance pillar, indicating that they meet people's needs and are perceived as more friendly, charming, kind, social, and cool than the 85% of brands tracked in that country. The top 5 perceptual dimensions of these brands are also core to Colombia as a country brand.



This can be seen in many countries around the world such as the United States, as an example of a drastically different culture. The US is a country perceived as a leader, best brand, distinctive, progressive, and committed to inclusion. Brands born in the United States that have a strong cultural connection with the country are at the top of the ranking in these attributes. Brands such as Microsoft, Amazon, Disney, Target, Levi's and Tide are some of these examples. They are not only in the top 10% of the most relevant brands but also among the most well-regarded brands in the country. In a country like the United States, where excellence and performance are at the forefront, brands behave similarly to meet people's expectations. This leads to higher levels of emotional commitment between Americans and these brands plus contributes to a sense of belonging and shared identity among Americans.

Brands say a lot about the culture, and culture says a lot about the brands. Brands can shape our perceptions of beauty, success, and happiness and impact how we interact with each other and the world around us. By understanding the relationship between brands and culture, we can gain insights into that culture's beliefs, attitudes, and traditions. Think about the county you grew up in, the brands that surrounded you, and how that impacted what you are and what that culture is today.

So, is the country's culture shaping your brand, or is your brand shaping culture and country? How does your brand messaging and branding is impacting customers' sense of belonging and shared identity? How can your brand influence culture and help create a positive inclusive sense of national identity?

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BAV Group, a VMLY&R consultancy, is the world's leading authority on data-driven branding™. Our strategic consulting services harness the power of *True Brand Equity*™ using WPP's proprietary BrandAsset Valuator® (BAV) – the world's largest and longest study of brands.

We are strategists and statisticians, but also anthropologists, creatives, sector experts and, ultimately, data storytellers. We bring our diverse experiences and teams together to help our clients make smarter decisions. We provide growth focused brand intelligence, customer insights, and marketing and business strategy by bringing data to the brand opinion party.