

BAV *Mest*
LOVED
RETAILERS
GLOBAL EDITION



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LET'S MAKE IT A DATE!

Welcome to WPP BAV's Love+ metric and a look at how leading retail brands from around the world perform on Love+.

Through unique BAV data and powerful insights we uncover the different kinds of love that retailers should inspire in consumers and why one kind of love is not enough.

Think of this as your first date with Love+, or the first single from our Love album, if you like.

This global edition of Love+ is being launched at the World Retail Congress includes analysis and a comprehensive overview of the many forces driving this fast-changing industry.

Feel free to contact us or any of the other contributors you will find at the end of the report to explore how we can help your brand grow.

LOTS OF LOVE

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Everyone knows what love is, right? And of course, every brand in the world wants to be loved. Simple.

Well, not quite that simple.

Why? Because love can mean so many different things to different people and in different situations.

There's the love you feel for your dog, love for chocolate cake, and a special kind of love reserved for your Granny.

And then ... there's
luuuuuuuurve.

Fortunately for Grannies and dogs, we're not saying that one kind of love is necessarily better or worse than another.

But there are powerful reasons why brands should know what kind of love consumers might feel for them, and why they would want to inspire the kind of love that sets hearts aflutter and pulses racing – not the kind of love people have for a comfy old sofa.





All You Need is Love

**John Lennon had it almost right,
but that's not quite the full picture.**

Sorry, John.

Because when you look at the kinds of retailers that consumers love, we see a similar spectrum of feelings as those that people have in the wider world.

The way they feel about retailers they "love" ranges from Granny love, to chocolate cake love, to George Clooney (or whoever else might apply)!

People "love" stores that offer them convenience or a bargain. They love retailers they can trust and that they see as friendly. They love reliable brands that help them with everyday life.

It's real, powerful love. It's love that brings people back into stores

again and again. Love that's based on respect and trust, dependability, relevance and leadership.

It has real value to brands. But it's the kind of love people feel for their best mate. For a comfy sofa or a good book.

It's not George Clooney love. It's not passionate love. Desiring, excited love. Love you have for a partner you're proud to call "the one".

These "loved" retailers – and many others like them – are generally lacking in energy. On the BAV measure of Brand Strength, they've actually declined in the past three years.

They have plenty of love, but it's not luvuuuuuuurve.



Why You Need

LOVE

If you're running a retail business, you might well be wondering, what's love got to do with it?

Love is a great attribute for retailers to have because it reflects emotional commitment from consumers.

So, while someone might consider choosing from a selection of retailers that would meet their needs, they're likely to actually buy from the one they most desire and love. In the brand world, passionate love leads to loyalty.

Love is also linked to advocacy, because when people love a brand, they tend to recommend it to friends and family.

In a social media world, that's a big benefit, and can make the difference between your

brand being loved by a few people and loved by many.

Brands that score highly for love also tend to be leaders; they have momentum and they are often also seen as being innovative and visionary – the kind of partner that other brands would like to work with as well.

They're seen as going places, and consumers want to go with them.

Understanding not only how much love a brand inspires but also what kind of love it generates can be highly insightful for a retailer.

With the Love+ model, BAV can help a brand establish its love identity and offer advice on what aspects of love it should build (and how). This, in turn, will help grow its overall brand equity.



introducing

+

LOVE

To help brands navigate the minefield that is modern love, BAV has come up with a fresh way of measuring and tracking love that takes in all the nuanced ways that people feel love.

We call it Love+, and it takes into account the sense of intimacy people feel for a brand, the commitment they feel towards it and – crucially – it includes passion.

Love+ isn't one metric but four, because it's clear that you can't compare Clooney and cake.

We'll explore each one in more detail, and showcase the most loved retailers around the world on each element of Love+, but here's a quick rundown.

To stick with the musical theme, we've gone with song titles to help capture the feelings people have when they relate to different retail brands.

Lean on Me

This is dependable, solid, reliable love.

Got to Get You Into my Life

These brands inspire aspirational, lustful, yearning love.

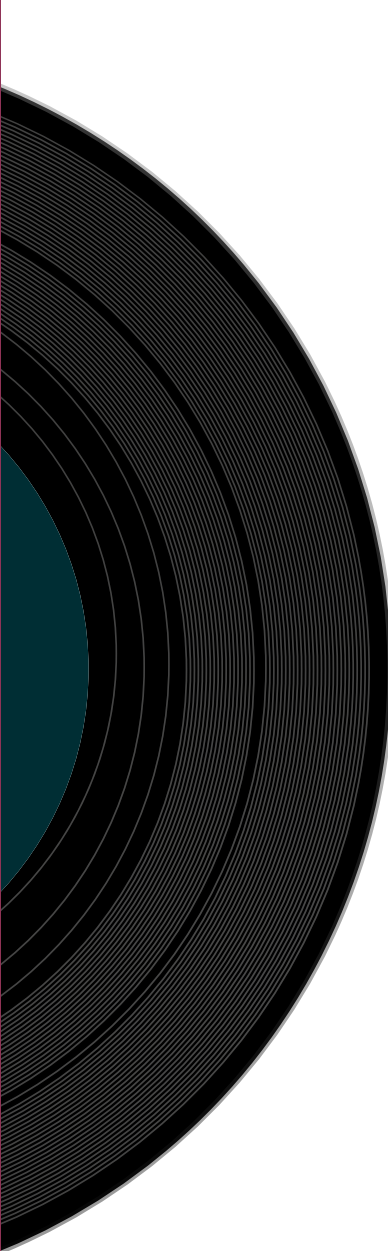
Can't Get You Out of My Head

This is intellectually stimulating, inspirational love.

Walkin' on Sunshine

When you feel playful, joyful love.

THESE FOUR ASPECTS OF LOVE+ ARE NOT MUTUALLY EXCLUSIVE. IN FACT, YOU'LL SEE THAT SOME OF THE MOST LOVED – AND MOST SUCCESSFUL RETAIL BRANDS IN THE WORLD – ARE LOVED IN MANY WAYS.



Using the Love+ model, we can establish which kind of love each brand inspires in consumers – or can hope to generate – and prescribe ways to help them boost their love profile.

For each of the four dimensions of Love+, we show how brands' rankings reflects their performance on BAV's Four Pillars of brand equity: Differentiation, Relevance, Esteem, and Knowledge.

Briefly, we define these Pillars like this:

DIFFERENTIATION is what makes a brand special compared to everything else in the market. A brand's point of difference could relate directly to the product or

service it offers, or it could be something less tangible: maybe prestige, innovation or purpose.

RELEVANCE is high when people feel a brand is appropriate to them and their lives right now, given their stage of life, budget, and all their unique preferences.

ESTEEM reflects how highly consumers regard a brand. Quality, trust, leadership, reliability, respect and admiration are all part of the Esteem calculation, and it tends to lead to advocacy.

KNOWLEDGE goes beyond basic brand awareness, measuring how well consumers understand a brand and what it offers.



READING BAV Pillar PATTERNS



For a deeper dive into the forces driving (or holding back) a brand, BAV can look at its Pillar Pattern – literally the pattern formed by the Four Pillars of a brand.

The relationship *between* the four pillars is as important as a brand's absolute strength on each, and brands with a similar Pillar Pattern tend to have similar qualities or attributes.



Pillar Pattern for 'Lean on Me' retailers

These brands' Pillar Pattern shows great strength across Relevance, Esteem and Knowledge, but it highlights a lack of Differentiation.

Why does that matter? When the Relevance pillar is higher than Differentiation, it's likely that price or convenience has become the main reason to use this retailer, rather than the brand being special or unique.

That means there's a danger of decline. Even loyal customers' eyes can start to wander if something more exciting comes along.

Retailers that inspire this kind of love are those that people feel are reliable, trustworthy, good value and original. If fans of these retailers were to sum up their relationship, they'd probably say "I can always count on you".

Pillar Pattern for 'Got to Get You Into My Life' retailers

Brands generating this kind of love are seen as highly Differentiated, and they have good levels of Esteem and Knowledge, meaning they're respected, trusted, and widely understood. There is, however, a sizable gap between their Differentiation and their Relevance.

A "Relevance gap" like this usually means a retailer has won attention for something unique it offers, but isn't yet part of many people's lives. This signals that the retailer probably has untapped potential.

Retailers that inspire this aspect of love tend to be perceived as offering style, quality, a trendy outlook and authenticity – and they have associations with sensuality. People aspire to have these brands as part of their lives.

Pillar Pattern for 'Can't Get You Out of My Head' retailers

Retailers that generate this kind of love are solid performers across all of BAV's Four Pillars, but they are strongest when it comes to Differentiation.

To boost their brand equity, these retailers would benefit from showing how they can be part of more people's lives (adding Relevance and, usually, market share into the bargain), and by better communicating reasons for consumers to trust them and see them as a leader through higher quality, greater reliability and more admirable behaviour.

Retailers like this are resourceful and intellectually stimulating, making consumers feel "I love the way you think". They're seen as innovative, daring, progressive, daring, intelligent and even visionary.

Pillar Pattern for 'Walkin' on Sunshine' retailers

The strongest pillar for "Walkin' on Sunshine" brands is Knowledge – these are retailers that people feel they understand well and feel great about using.

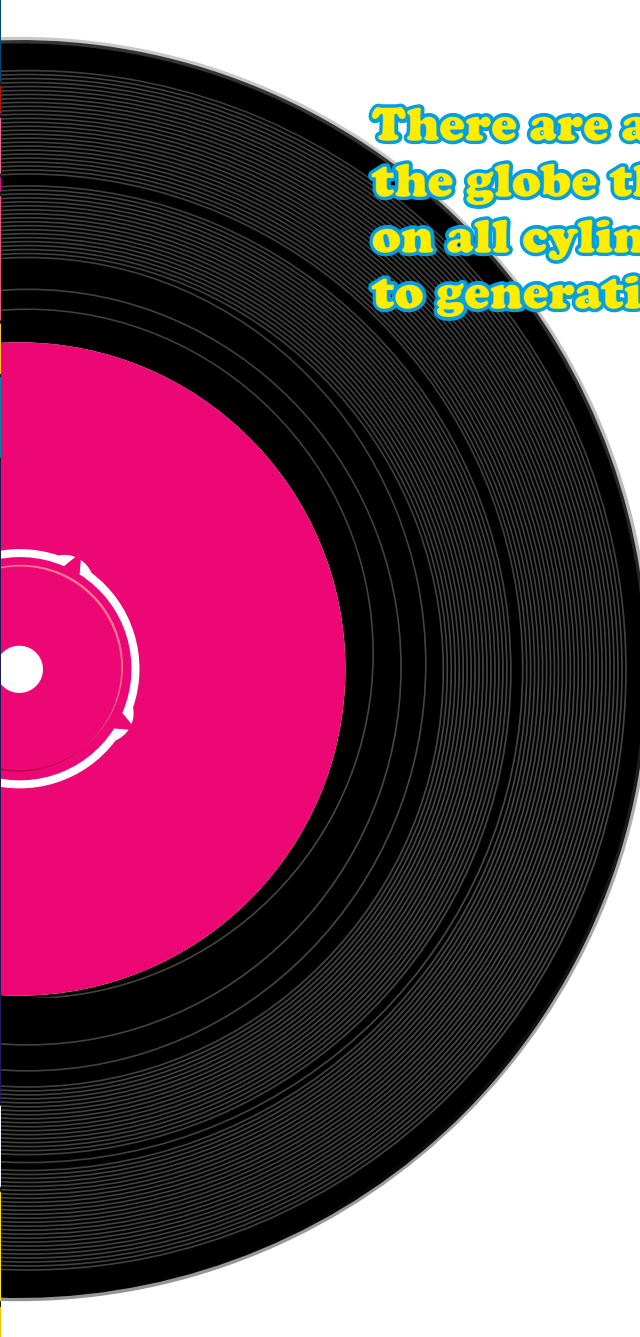
There is a slight risk, though, that with Esteem levels lower than Knowledge, familiarity could breed contempt.

Differentiation is slightly lacking, so there's a chance that consumers' heads will be turned by a new or more exciting alternative. For now, though, they're happy, happy, happy.

Retailers in this Love+ category are described by consumers as being charming, fun, energetic, sociable, creative and carefree. They're the brands people think of as "bringing joy and giving me a good time".

Love is all AROUND

20



**There are a
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to generati**

And look, for example, how well adidas does in Austria, Australia and Colombia

Australia

The digitisation of retail in Australia is happening in a distinctly Australian way. E-commerce has been slow to take off by global standards – a function of a relatively small population and the challenge of logistics in such a large country – yet there's near-universal usage of digital payments, and heavy use of car sales and real estate websites.

Everything changed in 2020, when pandemic restrictions led to a 58% surge in online retail sales, forcing retailers to rapidly upgrade their online offer and related services, like click-and-collect. New partnerships have been formed – Woolworths with Uber, for instance, for same-hour grocery delivery – to help retailers cope with demand.

During COVID, the big got bigger. The largest brick-and-mortar retailers were among the hottest e-commerce destinations. Supermarkets Coles and Woolworths, plus DIY giant Bunnings Warehouse and office supplier Officeworks all won digital sales thanks largely to trust earned via their extensive physical network.

Amazon and one of the local alternative marketplaces, Catch.com.au, also saw a surge in traffic, and eBay continued to appeal to the nation's small businesses as a way to reach shoppers nationally.

But simply being there, whether in the physical or online worlds, is not enough to turn likes into love; retailers have to do more, and that increasingly means offering something beyond goods and services. It means doing the right thing.

For decades, Bunnings has been home not just to hardware but also regular carpark "sausage sizzle" fundraisers by local charities, sports and social clubs. The brand also focuses on staff development and offers that all-important Aussie trait of being down to earth.

This community closeness also helps explain why KFC and McDonald's are often considered local brands; KFC supports cricket and its "Bucket, why not?" campaign displayed irreverence typical of the brand, while "Maccas" warmly embraces its Aussie nickname.

Mecca Cosmetics, meanwhile, is adored in a different way. It's a high-touch, high-service beauty boutique, with complimentary treatments in stores and a mission to make everyone feel beautiful. It's both aspirational and accessible.

The retailers considered most forward-thinking tend to be those offering the latest technology, though JB Hi-Fi stands out for giving its store staff flexibility to strike deals beyond the marked price.

Kmart is among the most spirited brands, thanks to a highly successful revamp that brought design in house and turned it into a destination for cheap chic and quality, affordable homewares.

BAV 'Lean on Me' LOVE

- 1 **Officeworks**
- 2 **Woolworths**
- 3 **BUNNINGS warehouse**
- 4 **JB HI-FI**
- 5 **Clarks**
- 6 **Hush Puppies**
FOOTWEAR & ACCESSORIES
- 7 **coles**
- 8 **adidas**
- 9 **SUBWAY**
- 10 **KFC**

BAV 'Got to Get You Into My Life' LOVE

- | | |
|--------------------------|--|
| 1 MECCA COSMETICA | 6 TIFFANY & CO. |
| 2 CHANEL | 7 THE NORTH FACE |
| 3 adidas | 8 <i>Cartier</i> |
| 4 Nike | 9 ZARA |
| 5 michael hill. | 10 TAG Heuer
SWISS MADE SINCE 1860 |

BAV 'Walkin' on Sunshine' LOVE

- | | | |
|---------------------------------|--------------------|-----------------------------|
| 1 EBGAMES | 5 JB HI-FI | 8 BUNNINGS warehouse |
| 2 VANS
"OFF THE WALL" | 6 COTTON:ON | 9 Smiggle |
| 3 Kmart | 7 IKEA | 10 adidas |
| 4 McDonald's | | |



Global retail brands across a range of sectors tend to set the pace for a great customer experience in Austria, and that's continued to be the case even as definitions of what makes that experience great have evolved in recent times.

In addition to seeking quality products, fair prices, convenience and helpful service, consumers during COVID times have also been favouring those retailers that have helped them feel safe while shopping – and have been critical of those offering deep pre-lockdown discounts that led to crowds forming in stores.

They have also been drawn to those linking pleasurable online browsing and shopping with speedy shipping and shopper-friendly returns policies. With expectations set by high-performing international brands, consumers have had little tolerance for those retailers with clunky websites and poor online service.











IKEA is one of the international players leading the way on a strong online and offline experience, with a brand message that consistently reflects its Swedish heritage and focuses on sustainability – a big and growing priority for Austrian shoppers. An urban IKEA store adorned with more than 100 trees is being developed in Vienna; there will be no parking, and shoppers are encouraged to cycle or use public transport to get there.

Among local retailers, Wein & Co has been pioneering great hybrid experiences; it has an extensive online wine shop, its physical branches are part-bar, part-store, and it offers wine-tasting courses as well as selling products.

Trust is a big part of love in this market; drugstore brand dm drogerie markt stands out for offering caring service in stores, and discount retailer HOFER shines for linking quality goods with budget prices.

This is not a market where people tend to use high-priced luxury goods to signal their status. The environment is a high priority, and since the pandemic there has been a surge in interest in buying locally to protect jobs and businesses.

BAV 'Lean on Me' LOVE

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- 2 
- 3 
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Source: WPP BAV

BAV 'Got to Get You Into My Life' LOVE

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- 4 
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- 9 
- 10 

BAV 'Walkin' on Sunshine' LOVE

- 1 
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BAV 'Can't Get You Out of My Head' LOVE

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Chinese retail has for some years led the world in its online and hybrid offerings; a handful of highly competitive online platforms linking browsing, socialising, gaming, shopping and payments have made e-commerce a national sport. Market leaders Alibaba and JD have created a packed calendar of popular shopping festivals, turned online influencers into sales megastars, and made livestreaming e-commerce a highly popular form of shopper-tainment.

Despite occasional localised lockdowns in 2021, restrictions related to COVID-19 are now largely consigned to memory in China. International travel remains all but impossible, but working from offices and dining out have been back to normal for many months. Shopping in physical stores and from digital platforms – often simultaneously – is as popular now as it's ever been.

What is changing, and to what extent remains to be seen, is the regulatory landscape in which e-commerce platforms operate. Rules are being reviewed relating to data protection and the ability of consumers to use services across competing platforms; they have the potential to transform online retailing, depending on how far they go.

In the meantime, consumers are spending more time home-cooking, a habit picked up early in the pandemic, and are indulging in weekend breaks – a new travel phenomenon born of closed international borders.

The retail brands most loved by Chinese consumers include Alibaba's Tmall and Taobao platforms – blending shopping, gaming, discounts and highly tailored content – and JD, which launched as an Alibaba rival and has grown to be one of the strongest retailers in the country. Suning, which specialises in electronics and has a long history in physical stores, shines for having a compelling hybrid model in which personal in-store relationships remain important.

But it's Haidilao Hot Pot that's setting new standards for what an in-person retail experience can offer. A blend of dining and theatre, Haidilao branches provide gifts for guests having birthdays, offer play centres for children, traditional dancing, manicures for guests – and creative incentive programmes for staff to provide excellent service. And, like the Hema supermarkets developed by Alibaba, they use robots and connectivity to streamline and automate behind-the-scenes operations.

BAV 'Lean on Me' LOVE

- 1 Haidilao Hot Pot
- 2 京东
- 3 LI-NING
- 4 苏宁易购
suning.com
- 5 Pizza Hut
- 6 Nike
- 7 Tmall 天猫
- 8 KFC
- 9 watsons
- 10 adidas

Source: WPP BAV

BAV 'Got to Get You Into My Life' LOVE

- 1 LI-NING
- 2 CHANEL
- 3 淘宝网
Taobao.com
- 4 苏宁易购
suning.com
- 5 adidas
- 6 ROLEX
- 7 Nike
- 8 Tmall 天猫
- 9 Disney
- 10 周生生
Chow Sang Sang

BAV 'Walkin' on Sunshine' LOVE

- 1 Haidilao Hot Pot
- 2 sam's club
- 3 万达广场
WANDA PLAZA
- 4 361°
- 5 苏宁易购
suning.com
- 6 Walmart
- 7 KFC
- 8 watsons
- 9 唯品会
vip.com
- 10 CONVERSE



The rise of e-commerce is taking place in a distinctly Colombian way. Over the past year, even the smallest stores have begun operating online, and retailers are not just building web sites, but finding new ways to link the online and offline worlds, taking orders via WhatsApp, for instance, and taking cash on delivery. This is vital in a market where few people have savings accounts much less credit cards, and where even Spotify and Netflix can be paid for in cash.

A gradual shift away from small, traditional retail towards malls has been under way for years; initially aimed at the most affluent consumers, there are now malls targeting people of all incomes, not just with things to buy but a place to hang out with friends and family.

The big change in retailing is the sudden rise of Rappi, a super-app that offers speedy grocery and meal delivery, money transfers and even digital music. The orange uniforms of the Rappi boys are ever-present, and they are also changing the way traditional retail brands get goods to customers.

Rappi's rise (it's Colombia's first "unicorn") has been driven by soaring demand for online shopping, which has also helped grow online marketplace Mercado Libre. Colombians are shopping around for the most convenient options but also the best prices; the scramble for discounted goods in the past year has in some cases led to chaotic scenes at stores.

Colombian retail brands with a special place in consumers' hearts include Crepes & Waffles, a fun and affordable dining experience that has evolved with people's changing priorities. More vegetarian options have been added recently, and the business hires single mothers as waitresses so there's a social responsibility element to eating there.

Chicken-based fast-food chain Frisby is loved for its affordable menu and, more recently, its e-store and delivery options. Tutto has for decades represented quality Colombian bags; while the styles evolve and always feel fresh, the brand offers familiarity and security.

BAV 'Lean on Me' LOVE





- 1 
- 2 
- 3 ARTURO CALLE
- 4 
- 5 
- 6 
- 7 
- 8 
- 9 
- 10 

Source: WPP BAV

BAV 'Got to Get You Into My Life' LOVE

- | | |
|---|---|
| 1  | 6  |
| 2  | 7 LACOSTE  |
| 3 ARTURO CALLE | 8  |
| 4  | 9 Calvin Klein |
| 5  | 10 BOSS  |

BAV 'Walkin' on Sunshine' LOVE

- 1 
- 2 
- 3 
- 4 

BAV 'Can't Get You Out of My Head' LOVE

- | | |
|---|---|
| 1  | 6  |
| 2  | 7 ARTURO CALLE |
| 3 amazon.com | 8  |
| 4  | 9  |
| 5  | 10 AliExpress |

- | | |
|---|--|
| 5  | 8  |
| 6  | 9 ARTURO CALLE |
| 7  | 10  |



Several consumer megatrends are together powering the evolution of France's retail sector – and only some are related to COVID-19.

Consumers are increasingly drawn to retailers that offer something that in normal times is simply expected: reliability, or just being there. Those retailers that kept on going and kept the country well-fed have been taken to heart.

When that reliability combined with inventiveness, the love grew even stronger. Consider sporting goods giant Décathlon, which offered online sales, digital advice on keeping fit and healthy, and donated diving masks that could be adapted to treat COVID patients. Similarly, DIY specialist Leroy Merlin promoted online channels where consumers could not only buy, but get reliable advice from its knowledgeable store staff.

At the same time, and largely unrelated to the pandemic, is a reappraisal of what constitutes "a good deal". This was never just about price, but now as well as considering convenience and quality, French consumers are looking for ways they can get a good deal for themselves at the same time as make a difference to others' lives or the environment.

For individual shoppers, there's often tension between value and their values. BAV research shows 73% of shoppers consider price a key factor in their decision making, but only 28% say price is their biggest concern. At the same time, over 62% say they are willing to pay at least a small premium to do good for the planet or have a positive impact on society.

This focus on sustainability is driving love for brands that have long focused on organic produce and being close to nature. Naturalia serves the premium end of the caring-consumer market. Grocery and hypermarket giant Carrefour, meanwhile, is making considered consumption more widely accessible thanks to its highly regarded "Act for Food" campaign.

These trends are combining to fuel love for retail brands such as second-hand clothing platform Vinted, which links responsible shopping with online convenience and getting a great deal. Veepee, formerly a members-only flash sale club (Vente-Privée), has bolstered its smart deal offer with ways to return and recycle unwanted clothing.

BAV 'Lean on Me' LOVE

- 1 GRAND FRAIS
- 2 DECATHLON
- 3 LEVI'S
- 4 fnac
- 5 adidas
- 6 YVES ROCHER FRANCE
- 7 LEROY MERLIN
- 8 Nike
- 9 THE NORTH FACE
- 10 b boulanger

Source: WPP BAV

BAV 'Got to Get You Into My Life' LOVE

- | | |
|------------------|-------------------|
| 1 LEVI'S | 6 LACOSTE |
| 2 CHANEL | 7 DIOR |
| 3 GIORGIO ARMANI | 8 RALPH LAUREN |
| 4 SEPHORA | 9 TOMMY HILFINGER |
| 5 BOSS HUGO BOSS | 10 NOCIBÉ |

BAV 'Walkin' on Sunshine' LOVE

- 1 IKEA
- 2 DECATHLON
- 3 SEPHORA
- 4 Cultura

BAV 'Can't Get You Out of My Head' LOVE

- | | |
|-------------|----------------------|
| 1 amazon | 6 Cultura |
| 2 IKEA | 7 YVES ROCHER FRANCE |
| 3 Vinted | 8 Veepee |
| 4 fnac | 9 LIDL |
| 5 DECATHLON | 10 showroomprive.com |



- | | |
|----------------------|----------------|
| 5 YVES ROCHER FRANCE | 8 LEROY MERLIN |
| 6 amazon | 9 Vinted |
| 7 fnac | 10 celio* |

The German retail sector is being shaken up by fast-moving start-ups as well as quick-thinking established brands, all of which are combining to raise consumer expectations of what's possible.

The growth of online shopping during the pandemic – with older first-time e-shoppers helped by relatives and neighbours to take the plunge – has rewarded those retailers that already had user-friendly sites and slick logistics.

Amazon is loved for its unmatched range and its extensive services, though growing concerns about corporate social responsibility mean that for some of its users, Amazon is their guilty pleasure. Local online clothing giant Zalando, now a force all across Europe, is the darling of German e-commerce, thanks to a seemingly endless assortment, unmatched promises on returns, and ground-breaking communications campaigns, including one that encouraged shoppers to scream with joy when their packages arrived.

These brands have trained consumers to demand anything, any time, with great customer service – and they've inspired a new generation of e-commerce providers. During the pandemic, many independent stores hit by the loss of passing trade began offering online ordering. And new services that seek to surpass already-high shopper expectations have sprung up. These include Gorillas, a grocery service promising delivery within 10 minutes, which has proved such a hit that it went from launch to \$1 billion in value in just nine months. Rivals Flink and Getir are also winning trade.

But it's not just digital-first brands winning German hearts. Otto, formerly a catalogue and physical retail business, is now a huge hybrid player, offering over 3 million items and investing heavily in social media communications. And adidas is loved for being always on trend, particularly with its retro styles and celebrity collaborations.

German pride in getting great value for money is as strong as ever. This is the country that introduced the world to discount supermarkets via Aldi and Lidl, and where people spend a much smaller proportion of household income on food shopping than many of their European compatriots. Drugstore chain Rossmann is a favourite among many German shoppers for providing value, while rival dm drogerie markt is tapping into rising demand for healthy living with an extensive organic personal care and food range.

BAV 'Lean on Me' LOVE

- 1 
- 2 
- 3 
- 4 **NORDSEE** 
- 5 **ROSSMANN**
- 6 **amazon**
- 7 **REWE**
- 8 **fielmann**
- 9  **Kaufland**
- 10 

Source: WPP BAV








BAV 'Got to Get You Into My Life' LOVE

- 1 
- 2 **DOUGLAS**
- 3 **BOSS**
HUGO BOSS
- 4 
- 5 Calvin Klein
- 6 TOMMY  HILFIGER
- 7 **CHANEL**
- 8 LACOSTE 
- 9 
- 10 **DIOR**

BAV 'Can't Get You Out of My Head' LOVE

- 1 **amazon**
- 2 
- 3 
- 4 
- 5  zalando
- 6 **MediaMarkt**
- 7 
- 8 **billiger.de** 
- 9  MISTER SPEX
- 10 **fielmann**

BAV 'Walkin' on Sunshine' LOVE

- 1  **McDonald's**
- 2 
- 3 
- 4 
- 5 **CONVERSE** 
- 6  zalando
- 7 **amazon**
- 8 **amorelie.de**
- 9 
- 10 **eis.de**



Mexico

The retail brands that consumers love reflect the importance of the industry to the way Mexican people live their lives.

Convenience stores, fast food outlets, supermarkets and pharmacies are a big part of consumers' daily routines. This is perhaps unsurprising in a market that has a major problem with obesity – over 64% of Mexicans are classed as overweight – and there is an epidemic of type-two diabetes linked to diet and lifestyle, as well as air pollution in cities.

Mexican consumers tend to be such frequent users of pharmacies and drugstores that they build up relationships with the health professionals they consult there. Farmacias Similares has become a favourite for many with its reassuring combination of basic products and services at widely affordable prices. Also winning consumer love is Farmacias San Pablo, the most premium pharmacy option, with large stores, a wide range and a sector-leading e-commerce offering via both web site and app.

Eating out is an important part of Mexican culture, and more than 115,000 taco stands, or taquería, are testament to the importance of street food to daily life. It's said that Mexicans are never further than 400 metres from a taco stand. Yet chains of quick-service restaurants are among the most-loved retail brands in the country. This is because they serve a different purpose to the taquería, offering international standards of service suited to more special occasions, yet with localised menus. Little Caesars and Domino's Pizza, for instance, deliver their pizzas with sachets of multiple flavoured sauces to be added as toppings, and McDonald's in Mexico offers the McMollette breakfast sandwich of beans, cheese and sauce.

Other well-loved retailers in Mexico include Martí, a sporting goods specialist that during the pandemic has made great strides digitally, bolstering its e-store as well as launching online fitness coaching dubbed "quarantraining".

But shoppers' favourite sport is getting a bargain at the frequent sales events, largest among them the annual "El Buen Fin" or "Good Weekend" festival each November. Consumers tend to hold off making big purchases when they know a sales is coming up – and the next is never far away.

BAV 'Lean on Me' LOVE

- 1  Super Farmacia
- 2  Little Caesars
- 3  Bodega Aurrera
- 4  FARMACIAS SIMILARES
- 5  sam's club
- 6  Walmart
- 7  Domino's
- 8  Office DEPOT
- 9  Office DEPOT
- 10  THE HOME DEPOT

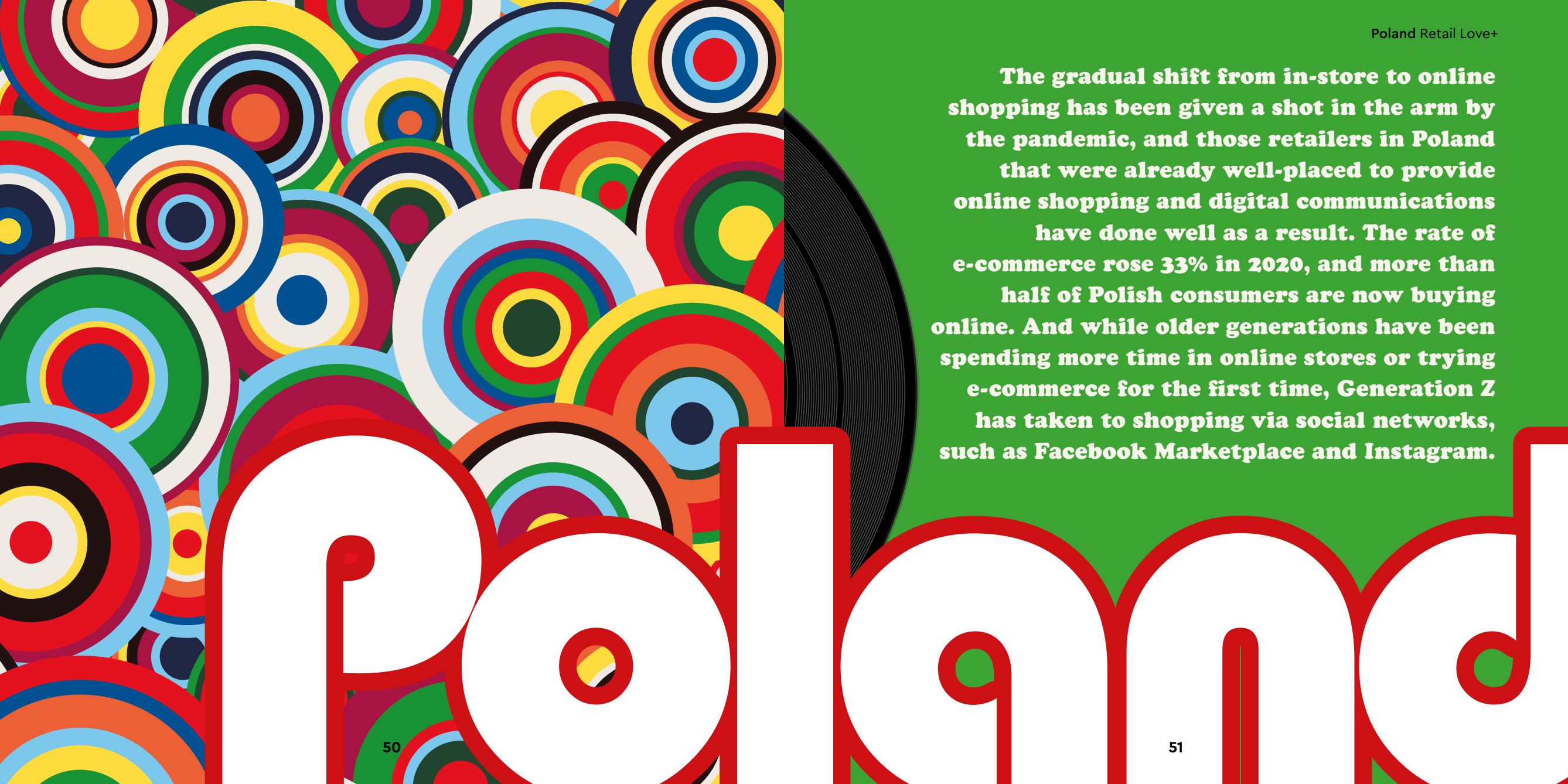
Source: WPP BAV

BAV 'Got to Get You Into My Life' LOVE

- 1  Walmart
- 2  El Palacio de Hierro
- 3  Liverpool
- 4  THE HOME DEPOT
- 5  Office DEPOT
- 6  Little Caesars
- 7  Sanborns
- 8  marti
- 9  sam's club
- 10  Cuenta Menos

BAV 'Walkin' on Sunshine' LOVE

- 1  Domino's
- 2  OXXO
- 3  Office DEPOT
- 4  KFC
- 5  McDonald's
- 6  BURGER KING
- 7  Little Caesars
- 8  Pizza Hut
- 9  RadioShack
- 10  amazon

The background of the page is a vibrant, abstract composition. On the left side, there is a dense cluster of numerous concentric circles in various colors including red, yellow, blue, green, and purple. These circles vary in size and are layered, creating a sense of depth. On the right side, the background is a solid green. A large, stylized white letter 'P' with a thick red outline is positioned in the lower half of the page, partially overlapping the green area and the bottom edge. The text is located in the upper right quadrant of the green area.

The gradual shift from in-store to online shopping has been given a shot in the arm by the pandemic, and those retailers in Poland that were already well-placed to provide online shopping and digital communications have done well as a result. The rate of e-commerce rose 33% in 2020, and more than half of Polish consumers are now buying online. And while older generations have been spending more time in online stores or trying e-commerce for the first time, Generation Z has taken to shopping via social networks, such as Facebook Marketplace and Instagram.

The sudden surge in digital shopping has seen many retailers here scrambling to keep up, refreshing their web sites and investing in services such as online chat. Retail chains such as MediaMarkt and RTV EURO AGD already had strong hybrid business models and were ready with new TV sets, gaming consoles and other gadgets to help consumers fill their days while stuck at home.

Some much-loved retailers that were allowed to stay open throughout lockdowns, such as supermarkets and pharmacies, have thrived despite not having made much of a shift online. The Biedronka supermarket chain, for instance, is the country's largest retailer. It still doesn't offer online shopping, but with a store in almost every neighbourhood and a compelling in-store range, it hardly needs to.

Innovation has, however, been driving love for brands like Empik – originally a books and music store and now a destination for games, art supplies all things creative, both online and offline. And the German-based drugstore chain Rossmann, well-loved for its extensive range, handy store network and reputation for quality, is also seen as pioneering more environmentally friendly retailing, an area of rising consumer interest, with refill stations and ecological beauty products.

Other retailers that have earned a place in Polish shoppers' hearts include those luxury brands that lend instant cachet to the user or wearer. Shoppers for high-end goods in Poland are often making sacrifices in other categories in order to be able to step out in style in an item that offers prestige and makes them feel great.

BAW 'Lean on Me' LOVE

- 1 **ROSSMANN**
- 2 **LIDL**
- 3 **empik**
- 4 **Auchan**
- 5 **MediaMarkt**
- 6 **Levi's**
- 7 **castorama**
- 8 **RESERVED**
- 9 **DECATHLON**
- 10 **IKEA**

Source: WPP BAW

BAW 'Got to Get You Into My Life' LOVE


- | | |
|------------------|-----------------|
| 1 GIORGIO ARMANI | 6 gino rossi |
| 2 BOSS HUGO BOSS | 7 Levi's |
| 3 VISTULA | 8 RYLKO |
| 4 SEPHORA | 9 WOJAS |
| 5 DOUGLAS | 10 GUCCI |

BAW 'Walkin' on Sunshine' LOVE

- | | | |
|-------------------|--------------------|--------------------|
| 1 ROSSMANN | 5 house | 8 castorama |
| 2 empik | 6 LIDL | 9 TESCO |
| 3 DOUGLAS | 7 E.Leclerc | 10 Bershka |
| 4 RESERVED | | |

BAW 'Can't Get You Out of My Head' LOVE

- | | |
|--------------------|----------------------|
| 1 empik | 6 Auchan |
| 2 castorama | 7 MediaMarkt |
| 3 ROSSMANN | 8 LEON MERLIN |
| 4 RESERVED | 9 IKEA |
| 5 LIDL | 10 INTERSPORT |



Having escaped the early waves of COVID-19 relatively unscathed, Thailand in mid-2021 was suffering from widespread outbreaks resulting in a series of regional lockdowns, with big implications for consumers, their spending priorities and their shopping habits.

In normal times, Thai shopping malls are popular leisure destinations, providing not just opportunities to shop but also air-conditioned meeting places for dining and entertainment. The closure of malls to all but supermarket and pharmacy shoppers has led consumers to do more of their shopping online, and to significantly increase their use of meal-delivery services.

At the same time, rising unemployment and uncertainty about future job security has had a dampening effect on spending overall; even those with steady incomes are showing a reluctance to indulge for fear of what the future might hold.

And while concern about the effects of plastic pollution had been increasing, in 2021 that has taken a backseat to more immediate concerns around hygiene; disposable gloves, masks and takeaway containers have been filling the nation's rubbish bins.

Those retailers that were already well-known for having strong online offerings include The Pizza Company, famous for its frequently changing themed promotions and its localised menus. The brand is part of the Minor group, which includes other food brands such as Thai Express, Burger King and Sizzler in Thailand, as well as hotels and fashion retail brands – all of which are linked via an app and call centre for ease of use.

Central Department Stores and Central World also had strong online services before the pandemic struck, and have been offering services such as video calls with staff. In physical retail, they are known as fun shopping destinations, and for compelling loyalty schemes that offer members discounts and special deals.

The popularity of regional e-commerce giant Lazada has continued to rocket over the past year; a local Thai version of the platform has been running since 2015 and – backed by China's Alibaba – is a pioneer in terms of online range, services, promotions and shopper engagement.

BAV 'Lean on Me' LOVE

- 1 
- 2 
- 3 
- 4 
- 5 
- 6 
- 7 
- 8 
- 9 
- 10 

Source: WPP BAV

BAV 'Got to Get You Into My Life' LOVE

- | | |
|---|--|
| 1  | 6  |
| 2  | 7 LOUIS VUITTON |
| 3  | 8  |
| 4 GUCCI | 9  |
| 5 CHANEL | 10  |

BAV 'Walkin' on Sunshine' LOVE

- | | | |
|---|---|--|
| 1  | 5 centralwOrld | 8  |
| 2  | 6  | 9  |
| 3  | 7  | 10  |
| 4  | | |

The past year has triggered a transformation in the way Turkish people shop; while many markets have seen a rise in e-commerce, in Turkey, the shift has been seismic, with online shopping up 49% in 2020. And yet, with half of the country's consumers yet to take the plunge and make their first online purchase, there remains huge scope for further change.

TURKEY

This shift has triggered rapid expansion for online retailers including Trendyol, the largest e-commerce platform in Turkey. Trendyol is known for offering quality products at affordable prices, with secure payment and quick delivery. It's also behind the second-hand platform Dolap, and delivery network Trendyol Express.

Hepsiburada is also widely loved by e-commerce users, and is one of the largest and oldest online stores, with an extensive range from grocery to electronics and apparel. The super-fast delivery service Getir, offering groceries to your door in just 10 minutes, has also experienced a boom, and has been expanding beyond Turkey.

In physical retailing, the long-established supermarket chain Migros is affectionately regarded and highly trusted, thanks to an extensive range of goods at prices that compete with the discounters. It's also active online, and adapts to suit the needs of new generations of shoppers. Migros is one of many Turkish retailers focusing on private label ranges – not just cheap alternatives to brands but more exclusive offerings as well.

In fashion, local brand LC Waikiki is loved thanks to its promise that "everyone deserves to dress well", coupled with a vast store network and quality goods at widely accessible prices. With clothing for men, women and children, LC Waikiki is seen as creative and innovative, with on-trend collections and friendly service.

The future of Turkish retailing will no doubt be a blend of online and offline browsing and buying, with a focus on the customer experience. The new İstinye Park flagship store of electronics retailer Arçelik, for instance, is billing the site as an experience centre, with VR gaming and interactive touchpoints that make for immersive interactions as well as retail transactions.

BAZ
'Lean on Me'
LOVE

- 1 
- 2 
- 3 **MIGROS**
- 4 
- 5 
- 6 **Carrefour** 
- 7 **mavi**
- 8 **hepsiburada**
- 9 
- 10 

BAZ
'Got to Get You
Into My Life'
LOVE

- | | |
|---|--|
| 1 ZARA | 6 LACOSTE  |
| 2  | 7  U.S. POLO ASSN.
SINCE 1900 |
| 3  | 8 KİGİLİ |
| 4 mavi | 9  ROLEX |
| 5  | 10 ALTINYILDIZ |

BAZ
'Walkin'
on Sunshine'
LOVE

- | | | |
|--|---|--|
| 1 LC WAIKIKI | 5 sahibinden.com | 8 MIGROS |
| 2  | 6  Domino's | 9 hepsiburada |
| 3  | 7  McDonald's | 10  |
| 4 Carrefour  | | |

BAZ
'Can't Get
You Out of
My Head'
LOVE

- | | |
|---|---|
| 1  | 6 sahibinden.com |
| 2 MIGROS | 7 amazon |
| 3 ZARA | 8  |
| 4  | 9  |
| 5  | 10 mavi |

Source: WPP BAV



UK

Several broad consumer trends are dictating the success or failure of British retail brands; those retailers that are on top of these trends – or even combining them – are the ones reaping the rewards in the love stakes. But there’s no mercy for those failing to adapt.

This is a retail market in which many decades-old and well-loved brands have shut down in recent years; while they have been fondly regarded and widely accessible, their offer has failed to keep pace with what consumers really need.

A polarisation of convenience and experience has left behind some shaky middle ground, and this has proved to be the vulnerable zone for those retailers that have failed to evolve. Yet for those brands offering either amazing convenience or a brilliant, immersive, irreplaceable and enjoyable experience, the rewards have been huge.

Retail brands like IKEA and Apple, for instance, offer an unmatched in-store experience: using room mock-ups to simplify product selection in the case of IKEA, and Apple stores offering expertise and the chance to play around with new products in an amazing setting. Amazon, too, is refining its recommendations to offer more curated selections – increasingly important in a world of so much choice.

Those rare brands that manage to combine both convenience and experience are truly feeling the love. Aldi and Lidl promise a bargain and a bit of fun; they play up to the idea that you might go in experience that feels right for the budget.

Moonpig is loved for linking convenience and experience, offering the ability to personalise cards and gifts, and have them sent straight to the recipient without having to move from the sofa. And Tesco is among the nation's favourite supermarkets for working with another megatrend, a preference for shopping local, by investing in neighbourhood stores. Tesco's recent "Food Love Stories" campaign, about the stories behind the meals we share with special people, also helped people warm to the brand.

A preference for supporting local, individually owned stores, especially as many people continue to work from home, has strengthened over the past year, alongside demand for homewares that help people enjoy their time there.

GAZ 'Lean on Me' LOVE

- 1 
- 2 
- 3 
- 4 
- 5 
- 6 
- 7 
- 8 
- 9 
- 10 

GAZ 'Got to Get You Into My Life' LOVE


- | | |
|---|---|
| 1 GUCCI | 6  ROLEX |
| 2 TIFFANY & CO. | 7 <i>Cartier</i> |
| 3 BOSS
HUGO BOSS | 8 ARMANI |
| 4 DIOR | 9 VICTORIA'S SECRET |
| 5  | 10 RALPH LAUREN |

GAZ 'Walkin' on Sunshine' LOVE

- | | | |
|--|---|---|
| 1  McDonald's | 5  | 8  |
| 2  | 6 ASOS | 9 wetherspoon |
| 3 GAME | 7 PANDORA | 10 ACCESSORIZE
LONDON |
| 4  Nando's | | |

GAZ 'Can't Get You Out of My Head' LOVE

- | | |
|---|--|
| 1  | 6  |
| 2  | 7  |
| 3  | 8  |
| 4 Waterstones | 9 GAME |
| 5  | 10  |



A desire to shop with a sense of purpose is intensifying, with US consumers reaching for brands that help them make a difference to their own lives, the environment, and other people.

Sustainability and social justice are strong influences on buyer behaviour, along with a preference for buying local to support independent retailers and local jobs. Shoppers are balancing a search for value with their personal values.

More Americans are now shopping online than ever before; those who had been reluctant found they had little alternative at the height of the pandemic, and their experiment has largely been a happy one.

One of the big winners has been Amazon, widely loved for being user-friendly, offering endless choice and speedy delivery, which combine to help consumers feel empowered.

Several retailing stalwarts with roots in brick-and-mortar stores have also done well, drawing on trust earned over generations and adapting their in-store offering to new consumer behaviour. Home Depot, Lowes, Walmart and Best Buy, for instance, have become online shopping destinations thanks to their trusted physical network.

Best Buy is among those adapting to new conditions by offering kerbside collections, in-store experiences that feel COVID-safe, and home visits for technical support in ways that make customers feel safe.

The allure of a familiar name also helped Victoria's Secret build online sales during the pandemic, at the expense of some smaller lingerie retailers. The current brand revamp, designed to be more empowering of women, is in line with changing consumer sentiment.

Hobby Lobby has broadened its appeal beyond serious crafters as people have sought creative and satisfying routes to self-expression. Inspired by social media, young people in particular have taken up everything from knitting to scrapbooking – then post their achievements online for others to enjoy. Hobby Lobby and Michael's have been trusted friends on their journey.

Love for Dairy Queen has been strong for generations, and stems from delight at its shakes and ice-creams – always a special treat – as well as its light-hearted approach to communications. Chick-fil-A, meanwhile, earns its love by being a quick-service restaurant chain that feels like it's in a league above; super-clean branches and exclusive sauces and dips that people crave combine for a unique diner experience.

BAU 'Lean on Me' LOVE

- 1 amazon.com
- 2 Walmart
- 3 Chick-fil-A
- 4 THE HOME DEPOT
- 5 Levi's
- 6 LOWE'S
- 7 DQ
- 8 TARGET.
- 9 McDonald's
- 10 Walgreens


Source: WPP BAV

BAU 'Got to Get You Into My Life' LOVE

- | | |
|---------------------|-----------------|
| 1 VICTORIA'S SECRET | 6 MICHAEL KORS |
| 2 | 7 TIFFANY & CO. |
| 3 ROLEX | 8 RALPH LAUREN |
| 4 Calvin Klein | 9 Vera Bradley |
| 5 UNDER ARMOUR. | 10 Levi's |

BAU 'Walkin' on Sunshine' LOVE

- | | | |
|----------------|----------------|-------------|
| 1 HOBBY LOBBY | 5 TACO BELL. | 8 SONIC |
| 2 DQ | 6 Chick-fil-A | 9 CINNABON |
| 3 Michael's | 7 | 10 |
| 4 DUNKIN' | | |



CAN A CHATBOT GENERATE BRAND LOVE?



Jon Bird
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As retail rapidly digitises, driven even further and faster by the global pandemic, have we lost something tangible in the process? Does the rise of tools like AI and AR, a focus on logistics and statistics, and the gradual takeover of commerce by bytes and bots reduce or enhance the brand love bond between retailer and shopper?



Once upon a time, the humble shopkeeper ruled retail. He or she lived or died on an ability to greet customers in the local area by name, know their needs intimately, and exceed their expectations. Over a century ago, the founder of drugstore chain Walgreens, Charles Walgreen Sr., famously took customer orders over the phone and was able to maintain a conversation long enough to fulfil and deliver before the caller had hung up. (Talk about surprise and delight – take that, Amazon Prime Now.)

Of course, in the language of the digital present, that kind of approach is not “scalable”. But the principles of initiating and building a relationship – and engendering brand love – remain intact.

As retail evolved from single stores to chains, and from the immediate community to a global audience, there was still something about the physicality and humanity of a store experience which (when done right) created shopper chemistry. All the senses were stimulated in a way that a digital screen could never hope to match.

But perhaps as we transition to a post-pandemic world, that thinking is as old-fashioned as Charles Walgreen's mortar and pestle. Could a well-executed digital strategy be sufficient to make a shopper's heart race?

The BAV Most Loved Global Retailers Report helps to shed light on that question. And the answer is: "it depends".

It depends upon what kind of love you are trying to foster for your retail brand. As the Report informs us, there are four different flavours of brand love. (Yes, love is indeed a many splendoured thing.)

If your goal is "Dependable Love", a digital-first approach is essential. Number one on the US Top 20 of "Dependable Love" retailers is Amazon.com. Robust and innovative technology allows Amazon to (literally) always deliver for customers.

Conversely, if you are an "Aspirational Love" retailer, like Gucci, a high-touch, high-service bricks-and-mortar store experience is part of what adds lustre and love to your brand.

As an "Inspirational Love" retailer, you may need both digital and physical. Although it's interesting to consider that four out of the top five in this category in the US chart are heavy on tech – either in their route to market (e.g., Amazon.com) or the products they sell (e.g., Best Buy and Apple).

Finally, if you are chasing "Spirited Love", an interactive store experience could help in "bringing joy and giving (customers) a good time". (Which is how BAV describes the desired customer response.)

The framework of adopting a digital or physical bias given the type of brand love a retailer is seeking is useful, but it's not a black-and-white solution. The best retail brands today think holistically, not in silos, and anchor what they do in an amazing customer experience, no matter the channel or touchpoint.

Amazon understands that four walls can sometimes beat a 2-D screen – hence their rollout of physical stores (turbo-charged by tech). Nike uses its flagships to imbue a sense of love for its brand, but digital is brought into the experience. McDonald's is fundamentally physical, yet technology enhances love for the brand – from ordering via mobile, to licence-plate recognition in the Drive-Thru.

It's also important not to slavishly pursue just one type of brand love. The secret may well be to strive for fame in one kind of love, and then support strongly with another.

Which brings us back to the headline question at the beginning of this article: can a chatbot generate brand love? Well yes, if that love is "Dependable Love" (being there 24/7/365 for the customer), it can help. And it helps even more if the bot can hand off effectively to a living, breathing person at the appropriate stage of the process. Like the shopkeeper of old, there is still a very important place for humanity in building brand love and encouraging long-term customer relationships.





All the RIGHT MOVES

Here's a quick look at what some of retail's leading lovers have been up to – and how they've earned such strong Love+ from consumers.

Target (a Top 20 lover on three Love+ rankings) has prices that compare to discount department stores but strives to provide a more upmarket experience. The result is that people see shopping there as a joy rather than a chore, and being unable to walk out with just one thing has become a social media meme.



BAV research shows Target is seen by consumers as being among the top 10% of all US brands for being stylish, visionary, worth more, being "the best" brand, being sociable and kind. It ranks even higher for reliability, being down-to-earth, friendly and trendy, and is in the top 1% of all brands in the country for caring about its customers, being up-to-date, and being good value.

The online-only fashion retailer Asos.com generates powerful love on two of the four Love+ dimensions in the UK, its home market. Its success has been built on offering a vast range, good quality, prices consumers see as reasonable, and speedy delivery. It's also been progressive in relation to showing clothes on "normal" body types, and in the early weeks of the COVID-19 pandemic swiftly shifted focus to casual clothes, which were much in demand. It also provided clothing and financial support to frontline health workers.

asos

Asos.com performs better than 90% of all brands in the UK, from all business sectors, on BAV measures tracking the most trendy, carefree, up-to-date and stylish brands. It's also one of the leading UK brands for "gaining in popularity".

IKEA is a Top 20 performer on two of the four Love+ metrics in both the US and the UK. Consumers see it not just as a furniture retailer but a lifestyle destination that has made its mission to democratise design and homes with great function and feeling. It's benefitted from the home-working and "cocooning" at home trends during the past year, and has given its name to the "IKEA effect", which sees people value more highly things that they've created themselves (even with an Allen key and simple instructions).

BAV research shows IKEA is highly Differentiated, not just among homeware providers but among all brands in the UK. With results in the top 20% of all UK brands on all of BAV's Four Pillars, it is a true cultural icon. During the pandemic, IKEA donated thousands of products to vulnerable families and the UK's National Health Service. Its post-lockdown plans include a furniture buy-back scheme that will lead to sales of second-hand items.





You might be wondering how we quantify and compare something as complex and emotion-driven as love.

We start by asking people to rate the retailers they use or know of on a sliding scale between love and hate. Only those brands that average a top-end score at this stage are considered for inclusion in our Most Loved Retailers rankings.

We also ask people whether they would recommend these retailers to a friend, and measure their emotional commitment by asking about whether this is one of several brands they like, or the one they like best of all.

These sorts of questions provide the methodological magic that helps us distinguish real desire and affection from likeability and relationships built on habit. This is where we separate cake from Clooney.

Then, to determine which of the four Love+ categories a retail brand fits into, we track the personality attributes that consumers most strongly associate with each retailer.

That's because brands make an impression on consumers in much the same way as other people do. And it's why many of the words people use to describe brands could also apply to people; they have personalities and create memories.

This part of the process starts with 48 attributes ranging from being fun, carefree, arrogant and daring to kind, socially responsible and glamorous. We then narrow down the range of attributes and look at clusters of personality traits that relate to different aspects of love.

IF YOU'RE KEEN TO UNDERSTAND THE METHODOLOGY IN MORE DETAIL, GIVE US A SHOUT. WE **LOVE CHATTING ABOUT IT.**



REACH OUT

WE'D LOVE TO HEAR FROM YOU.

We'd be delighted to chat about how your retail brand fares on Love+, and how you could push more of the right buttons to win consumers' hearts – and boost all-important brand equity.

WE PROMISE NOT TO SING. BUT WE MIGHT PUT A LITTLE SONG IN YOUR HEART.

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THE HISTORY OF RETAIL IN 100 OBJECTS

FIRST CAME THE DEFINITIVE BOOK.

The WPP & Intel "History of Retail in 100 Objects" illustrated how retail has always played a vital part in the fabric of our lives.

Now, from WPP BAV & Intel comes the app – The History of Retail in 100 Objects virtual museum.

Download the app and go on an extraordinary journey of discovery and wonder. As you travel through the museum you'll see how retail has both borrowed from and contributed to society's evolution, from the Neolithic period to the present day.

You'll be able to read, hear and learn about the 100 Objects as they hover

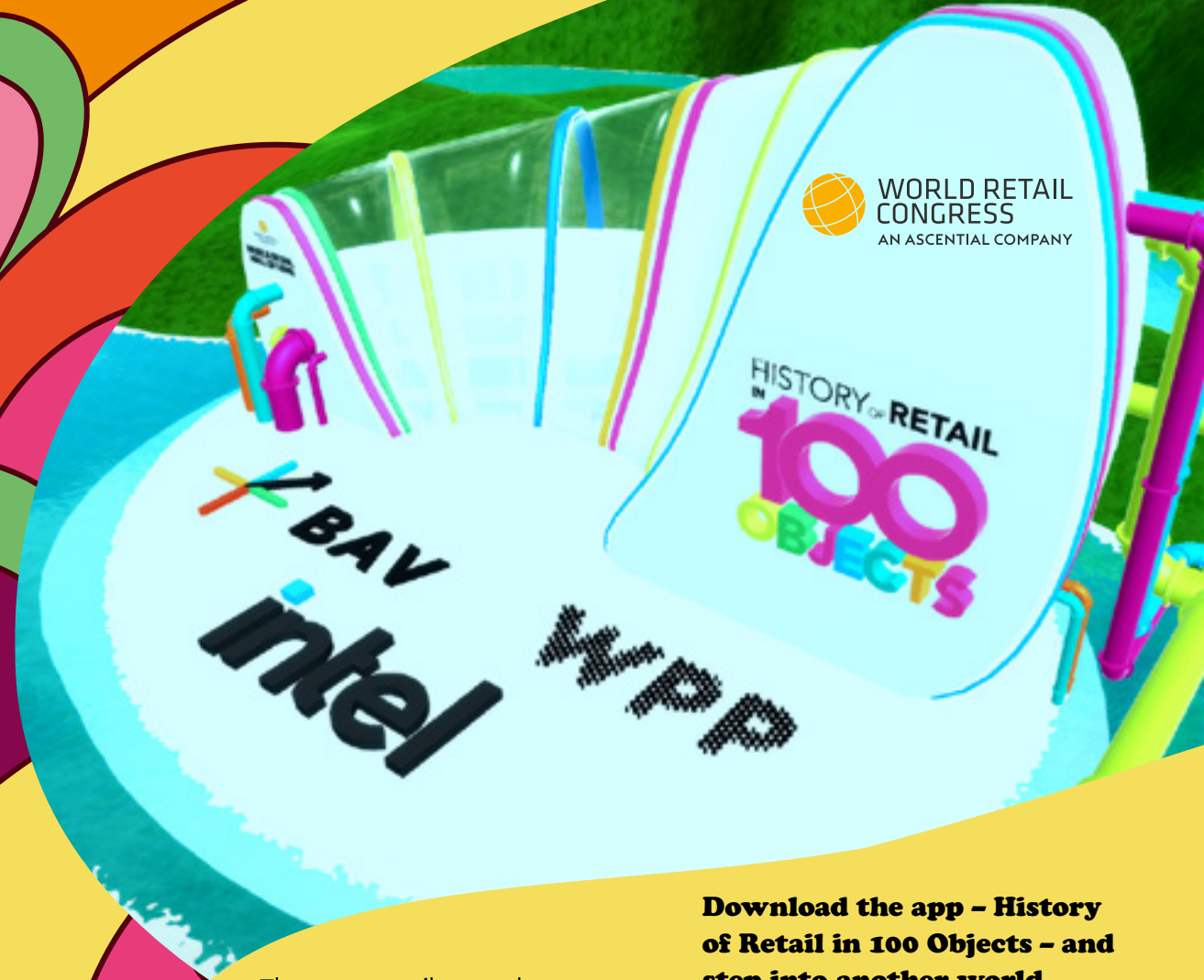
above their podiums in their period-coded galleries.

Drop into the Intel Hall of Innovation to watch videos highlighting innovations in Smart Vending, the Future of Interactivity and, in fact, The Future of Everything.

Then visit the World Retail Congress Hall of Fame and read about luminaries in the world of retail and their contributions to the sector. And listen to fascinating and in-depth interviews with legendary Hall of Famers like Jo Malone, Lord Stuart Rose, Cath Kidson, Kip Tindell and others.

And whilst you are visiting, pop into the bookshop and get yourself a copy of The History of Retail in 100 Objects book.

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