



Brand Identity Management

Insights 2024 Summary

Edition 5



‘As brand identity is increasingly informing strategic direction, VI360 talks to leading brand owners about the changes and challenges confronting the discipline. As brands strive to digitally differentiate themselves, a distinct and consistent brand identity has never been more important.’

VI360

Welcome

to our fifth report into **brand identity management best practice** where we have once again had the great privilege to talk to leading brand owners from diverse sectors about the challenges they face. We are immensely grateful to all participants who generously gave up their time to share their valuable insights.

Despite the diversity of participants, we find a common thread, particularly in the quest to differentiate brands in the digital landscape. Where brands compete for attention in smaller digital spaces, it is increasingly difficult to stand out. More than ever, a consistent brand identity is regarded as a strategic tool for competitive advantage.

The role of visual identity has evolved to become an integral element of strategic brand management, and many brands are finding a confidence to 'play' and 'experiment' with their visual identity. At the same time, other brands are reassessing the fundamentals of their visual identity systems, and discovering that a brand refresh may be required or that upgrades to their brand building toolkit are needed.

We find that brand management is better resourced than in past studies and assumes greater attention by the C-Suite, with brand values being tracked sometimes as intently as the share price, since there is now a better understanding that the two are inextricably linked.

Against a backdrop of media fatigue and PR spin, brands must prove themselves to be trustworthy and are trying to become more human and less corporate.

To stand out and remain true to purpose, brand owners are investing more in experiential branding to reach their consumers and foster loyalty. Brand toolkits now address all senses, beyond visual including touch and audio, evidencing the need for brands to connect, to resonate, and to reassure.

There seems to be a particular concern when evaluating what the 'employer brand' will mean to Gen Z, in terms of values, work-life balance and the physical work environment. The work environment has become a particular area of interest in this study as brand leaders assess the impact of building a brand in a hybrid working culture, where the physical brand touchpoints are not experienced in the same way as previously, and yet still have to be maintained and kept relevant.

Brand identity management is now a well-respected strategic discipline, supported with rigorous policies and governance procedures, measured in terms of perception and value. More than ever, it is about ensuring that brand is able to make genuine connections across all stakeholder groups.

Adam Newall
Managing Director, V1360

Our approach

The brand owners invited to take part in this study represent a wide range of business sectors, with a variety of brand identity management challenges.

Each respondent participated in a rich conversation, exploring the areas of brand identity as well as the strategic challenges faced by brand identity management within their organisation.

The key objectives of this study are to:

- Understand how companies manage their visual brand identities
- Identify emerging trends in visual identity and brand management
- Highlight best practice examples by comparing the results with earlier studies
- Pinpoint future challenges

Over the years, our studies have identified ways of working employed by leading brand owners that are now considered to be the core fundamentals of brand identity management best practice.

This is the fifth study undertaken by VI360. Previous studies were conducted in 2005, 2008, 2013 and 2017.

‘We took a four-phased approach to our brand refresh. We went deep with our research across all our stakeholders in six of key global markets, speaking to fans, journalists and club legends to understand what the club meant to them. We worked out our positioning and narrative and then we developed our visual identity.’

Chelsea Football Club

Contributing companies

VI360 carried out interviews for this study during 2023 and 2024. The findings expressed here are based on conversations with brand owners across a diverse range of business sectors. We are extremely grateful as without them, this study would not be possible.

AkzoNobel

AkzoNobel is a global paints and performance coatings company. Headquartered in The Netherlands, and operating in more than 150 countries, it employs approximately 32,000 people.



ArcelorMittal

ArcelorMittal is a multinational steel manufacturing company, employing around 126,000 people across 140 countries.



Cemex is a global building materials company. It offers cement, ready-mix concrete, aggregates, and urbanization solutions in growing markets around the world, powered by a workforce of more than 40,000.



Chelsea Football Club is based in Fulham, London. They compete in the Premier League, the top tier of English football.



Deutsche Telekom is a global integrated telecommunications company, headquartered in Bonn, Germany, operating in more than 50 countries and employing approximately 200,000 people. The company operates several subsidiaries worldwide, including the mobile communications brand T-Mobile.

Contributing companies...



JLL is a global real estate services company, headquartered in Chicago, USA and listed on the NYSE. JLL help buy, build, occupy and invest in a variety of real estate assets including industrial, commercial, retail, residential and hotel real estate. The company also provides investment management services worldwide. JLL has more than 106,000 employees in 80 countries.



PwC is a professional services network delivering consulting, assurance, advisory and tax services, operating in 151 countries with over 364,000 employees.



Siemens is a multinational technology conglomerate, focused on industry, infrastructure, mobility and healthcare. Siemens and its subsidiaries employ approximately 305,000 people globally.



Time Out is a global media and hospitality company, headquartered in London, UK that enables people to discover the best of a city. Time Out was established in 1968, in London by founder Tony Elliott and has developed into a global platform with 450 employees across 59 countries.



Zurich Insurance Group is a global insurance company, headquartered in Zurich, Switzerland, employing around 60,000 people, with customers in more than 200 countries.

Changing face of brand identity management

Brand identity has always encompassed the management, organisation, delivery and assurance of every physical manifestation of brand. From the design and creation of logo, assets and architecture systems to achieving a consistent implementation across all carriers e.g. signage, buildings, workwear, livery, communications collateral, the brand remit has been vast, and responsibility often undervalued.

Brand creation has sat comfortably within Communications or Marketing and implementation usually within Operations. As the discipline has matured there is less demarcation between design and implementation and a much more obvious interdependence between departments and functions. Brand identity cannot be isolated. It is core to the holistic brand experience on which commercial success depends. And is increasingly integral to strategy and direction setting.

Brand identity has created the foundations for brands to thrive and flourish and evolve. Brand refresh cycles have become shorter in concerted efforts to remain relevant. Greater organisational involvement and strategic alignment has led to a greater sense of shared purpose and a tangible belief in the capability and contribution of brand.

Leading strategic conversation

Brand is now driving the strategic conversation and has a proven correlation with the bottom line. Understanding and awareness of the importance of brand valuation is higher in this study than in previous research. Without exception, brand leaders are leveraging brand valuation data to justify brand investment. Even more interesting is the appetite of the C-Suite for brand valuation information.

C-Suite endorsement

Brand is higher up the senior management agenda than in previous studies. Brand identity and the value it represents is now seriously considered, evaluated and monitored. Brand has increasing ownership by the C-Suite with active CEO engagement and interest in the metrics of Brand and Brand Value.

Changing face of brand identity management...

Elevated role of the brand team

Brand refresh is aligned to strategic direction e.g. a change in ownership, a new leader, a major divestment, merger or acquisition, a refocus or revised purpose. The brand team are engaged at a much earlier phase, and recognised as the 'go to' experts for support in developing a new strategy or bringing to life to a new direction. This has elevated the role of the brand team internally and afforded them greater recognition, often earning them a seat at the strategy table.

Brand collaborators rule

Gone are the brand police and in their place are the brand collaborators. These are solutions-driven strategic thinkers, balancing the corporate need for consistent expression with the business need to differentiate in market, as well as a desire to connect and engage across all stakeholder groups. Brand dictatorship is consigned to a negative historical context as the value of shared responsibility for brand is now better understood. Brand identity management is successful where a spirit of collaboration and mutual respect exists throughout the organisation, supported by robust brand governance processes. The discipline is admired for its ability to manage the consistency of brand identity across all carriers.

Emotional vs artificial intelligence

Brand identity systems are incorporating elements that can create human relationships with warm and engaging content as a way to build trust. This is being activated in experiential ways including a wider range of sensorial components, tapping into all senses beyond visual. The emotional intelligence of brand is finally being embraced.

At the same time, the increasing use of artificial intelligence in this space is both an opportunity and a concern. Being authentic is perhaps an overused word in the brand vernacular, however, as AI becomes business as usual, it creates a potential conflict for brand in terms of being perceived as real, human and believable. There is however no denying that the integration of AI into brand strategy is revolutionising the discipline.

'We are trying to shift our focus from managing risk and reputation to proactively managing our brand as an asset. We will continue to evolve our global brand proposition as we know we cannot stand still.'

PwC

Organisation

Brand management is now a mature discipline with established systems, processes and resources in place to facilitate consistent deployment. With online portals and downloadable assets that are centrally updated, guidelines have become dynamic, easily accessible tools which has made the function highly efficient.

While central resources remain stretched, brand teams are achieving compliance with the support of digital technology platforms, which enable resources to be deployed in more strategic areas of brand identity management.

Functional collaboration

Brand Steering Groups, Brand Councils and Brand Leadership teams provide organisational authority and there is much closer collaboration between Brand and other functions. For example, Legal, Intellectual Property and M&A deal teams may not have historically engaged Brand at the strategic development table, whereas now the value of engaging Brand in these strategic discussions is better understood. An example of delivering value includes ensuring that de-branding terms are written into divestment contracts to avoid reputational damage from neglected assets. This is all evidence of greater internal collaboration between functions as understanding of brand value and its contribution is more widely recognised.

The Pandemic tested creativity and resulted in swift and efficient solutions for managing brand. Some organisations were about to launch new brand identities and programmes and found innovative ways to complete the task.

Skills and resources

And whilst almost every brand owner would welcome more budget and additional resources, there is enhanced capability, a greater level of skill and gravitas, and access to third-party support to supplement depleted resources. Trusted partner agencies are the heroes, and they have become an extension of brand teams, with intimate knowledge and understanding of brand needs. They remain key to brand consistency and brand compliance, along with in-house agencies who are seeing something of a resurgence.

Explosion of tools and training

There is continued investment in tools and training. There are Brand Academies, Centres of Excellence, Brand Universities, Brand Villes and Brand Centres, available in both physical and online formats. They are embedded within organisations and provide training for internal teams and agencies, disseminating tools, facilitating access to digital assets and delivering a brand-help support function.

Overall, these tools are improving compliance and brand consistency, but they need to be engaging and regularly refreshed to maintain interest. Improved access to tools and training have without doubt helped to drive higher levels of compliance.

Consistency and compliance

Standards are improving

Most respondents considered a 90% overall compliance rate across global markets to be a success, where they are operating globally across numerous countries, languages and cultures.

As brands have become more consistent and compliant in their expression, some brand owners have found the courage to experiment, to be playful and to take some risk with their identity. For example, creative campaigns which push the boundaries of compliance can be appealing to new stakeholder groups and help to get the brand talked about.

At the same time, some well-established brands are reassessing their visual identity processes and systems to check that the fundamentals are working well across all channels and there is a continual review of toolkits to ensure they remain fit for purpose.

But at what cost?

Brands are dynamic and the pressure is on to keep them fresh, relevant and interesting. Brand evolution cycles may be more rapid as their visual appeal is scrutinized for creativity and engagement. There is some concern that brand identity management has become more transactional and that creative sparks have been extinguished.

Digitalization has rapidly expanded media opportunities for brands to present themselves. Classic corporate design concepts oriented towards stubborn conformity no longer work. In the digital landscape there is scope to play and have fun, but this also creates a tension in the battle between creativity and consistency. Being clear on purpose and core values while retaining some visual adaptability seems to be the key to reaching an acceptable compromise.

‘Compliance is critical - there are so many copycat products out there. We strictly control design from the centre and use an in-house design agency for all corporate materials.’

AkzoNobel

‘To remain attractive and relevant, brands must be able to adapt to the situation and reinvent themselves again and again. Consistency at any price damages your brand.’

Deutsche Telekom

Consistency and compliance...

Local adaptation is more accepted

Where large corporates are decentralised, the challenge for brand consistency remains as high as ever. Investment in IT has facilitated centralised platforms which disseminate tools and training to local markets, and yet at the same time there is a greater tolerance of the occasional divergence emerging at a local market level. This 'accepted flexibility' when it comes to local cultural adaptation, is a concept that would have terrified most brand owners a few years ago, and it is not true of all brands. However, there is a sense that positive reinforcement reaps greater rewards than 'rapped knuckles' in the quest for consistency and compliance. Success comes down to supporting local markets with regular contact and ongoing training, with some organisations ensuring that brand training is compulsory.

'Brand building is all about relationships and creating advocates. It is about creative expression and looking at things differently.'

Zurich

'We have many languages, cultures and heritages, and so in that context I think 90% compliance is a success. We have worked hard to achieve that consistency with minimal resources. I say we are much better now than we were - so let's keep going.'

ArcelorMittal

Challenges

Retaining digital distinctiveness is a particular challenge. Where everyone is doing a great job, it is becoming more difficult to stand out.

Social media, and the freedom it affords, is increasingly important as brands try to manage storytelling across digital platforms. Brands cannot stand still. They are dynamic and evolving, but they still need to be familiar and always recognisable.

Implications of AI on brand identity

Artificial intelligence is a game changer for content creation, scheduled posting on social media, gathering data insights, improving customer experience with chatbots and augmented reality, and also for brand identity management.

Brands are utilising AI to generate unique logos and streamline the development of brand guidelines by ensuring consistency in colour schemes, typography, and messaging. Emerging developments, such as generative design and natural language processing, are pushing the boundaries of brand identity creation, making it possible to automate and scale branding efforts while retaining a high level of creativity. The challenge will be to reconcile the artificial with the emotional to ensure that warmth and humanity are not compromised. AI governance frameworks are being implemented to ensure that ethical guidelines are in place, and to provide transparency for stakeholders.

Remaining relevant

Remaining relevant and navigating the right social platforms is considered to be a key priority among brand leaders. In today's content-driven brand landscape, it has never been more crucial to understand your target audience and identify the right channels to reach them. LinkedIn has become more of a content destination and is increasingly being used as a social network.

Simplicity is important. Cutting through complex naming and sub-brands and making sense of unwieldy product extensions has become a challenge. And some brands are returning to fundamental principles, to establish a clear brand architecture and to validate their existing tools and check they remain fit for purpose.

Remaining true to your purpose and promise will continue to be tested particularly when brands are expected to behave in a certain way. A good example can be seen in the pressure on all brands to 'be more sustainable' and to demonstrate their action plans to achieve net zero. Knee jerk reactions to rewriting brand narratives often does not sit with core brand values. However, this does not mean that brands are not behaving responsibly, it is all about credible storytelling and demonstrating truths.

Challenges...

Being old has a value

Celebrating heritage for those long-established brands is recognised as a valuable point of difference. It helps to reinforce positions of expertise and knowledge and can build trust by demonstrating brand longevity.

Called-on and called-out

Brands exist in real time and are scrutinised to ensure they live up to their values and to stakeholder expectations. They are often called upon to voice an opinion, judged by their speed of response and called-out if they do nothing. Perhaps reputation has never been more fragile.

Long live the influencers

As B2C brands embrace influencer marketing in the quest for multi-millions of TikTok views, arguably B2B brands have long embraced influencer marketing as an integrated part of their brand-building strategies. Building partnerships with industry experts who speak at events or author articles, has long been a staple of B2B influencer marketing toolkit. What has changed is the way content is used to feed social channels and generate resonating posts. Influencer marketing in the B2B space is not about having thousands of followers; it is about creating meaningful engagement and long-term relationships. While influencers will inevitably grow as a component of the brand toolkit, control of the narrative may be precarious.

‘The Time Out brand is a critical contributor to the success of both Media and Markets, and rather than view these businesses as two separate units, we believe there is substantial potential to increase the synergies between the two and cement Time Out as a unique brand and proposition, both for our audience and for our commercial partners.’

Time Out

‘We renewed our identity to show how we are much closer to our stakeholders. It was an evolution as we recognised that we had a strong identity with a 118-year history.’

Cemex

Challenges...

Connecting with Gen Z

Understanding how to connect with Gen Z was voiced as a recurring conundrum for brand leaders in terms of appealing to them as a potential employer brand, and also as a consumer. For the 'always on' digital natives, who have grown up with technology that has impacted almost every aspect of their lifestyle, behaviour and attitude, there is an underlying concern that conventional brand channels may not be effective. It is not surprising that some brands are using neuroscientists to check if their brand positioning is relevant and resonating with younger generations.

On employer branding, the battle for attracting and retaining young talent remains a challenge. Of even greater concern is the dilemma around building employee brand engagement in the absence of a five day office-based week, where the interfaces with physical brand touchpoints in traditional work environments are significantly reduced. Employers are investing in making workspaces appealing and regular team huddles and creative ways of connecting are scheduled, but there is a sense of mourning that the days of the impromptu informal coffee machine catch-ups are over, and some uncertainty about what will, if anything, take its place.

Visual identity through storytelling

Compelling content and visual storytelling are the activation hooks to keep brand interesting and relevant. Investing in powerful and distinctive imagery remains a key component of brand budgets. Videos and short movies are considered to be the most powerful way to bring your brand to life, as social media consumption has altered the way we interact with brands. Less dwell time and smaller screen space means impactful images and motion have become more powerful than words. The challenge is to define a style of imagery that is ownable, reflects the essence of the brand, is immediately recognisable and, most importantly, attributable. One solution being commonly deployed is using a core brand colour as part of the image composition, however, the quest for real, believable images presents a dilemma in this space that has yet to be fully resolved.

Power of visual expression

Despite the challenges presented by new technologies, speed of response, demanding consumers and hybrid working, the fundamentals of brand identity remain reassuringly constant. Brands exist in the minds of their consumers based on their brand experience. And that experience is initially informed by visual impressions. Every company needs to find its own visual strength around which you can build a visual identity system. The brand components that have always formed the tip of the eponymous iceberg (logo, colours, images, tone of voice, etc.) have to be accurate, consistent, and absolutely aligned to purpose and values. Perhaps the drive to remain relevant will increase the frequency of the brand refresh cycle as brand assets become more respected for the value they generate.

Looking ahead

The future space for brand identity management

As brand identity continues to contribute to strategic decision making, so too brand value and measurement will assume increasing relevance, particularly as it aligns to growth and investment decisions.

While brands need to engage across increasingly dynamic digital platforms, the need to maintain consistency throughout the brand evolution cycles will represent an interesting challenge for brand identity managers.

Connecting with Gen Z to create lasting engagement, will continue to keep brand leaders up at night. They will need to search for creative ways to connect with the generation that has an all-consuming appetite for creative digital content and a high social conscience, shaped by the table-stake values of inclusivity, sustainability and authenticity.

Experiential, immersive branding with increased emphasis on multi-sensorial appeal will continue to inspire creative teams as they look to achieve and maintain a distinct brand positioning.

Future brand identity will be increasingly visual and colourful as images and video continue to bring brand narrative and brand essence to life. More than ever, the visual identity will be the shorthand indicator for stories being told by every brand.

Brand identity has come a long way in the way it is perceived as a strategic and valuable discipline and the future will undoubtedly be dominated by AI. Exploiting the opportunities afforded by AI technology will open up exciting ways to develop, manage and safeguard the brand, while at the same time be scrutinized for transparency and authenticity.

While AI generated content is efficient, it may diminish the core humanity of brands who strive to make the very emotional connection that helps them stand out. Brand identity in the future may become a metaphoric battleground between artificial and emotional intelligence which has all the elements of a blockbuster sci-fi movie.

‘Experiential branding is where it’s at. Let’s face it, even the most brilliant templates just get very boring after a while! It’s all about being intentional and purposeful.’

Siemens

‘Having a data-driven case was important to convince, reassure and of course to ask for and justify investment. Once we had the data, we had attention. No one could dispute the data.’

JLL

About VI360

VI360 is a strategic brand identity management consultancy and part of the Brand Finance Group.

From creative design and detailed cost planning, through launch and implementation, to care and evaluation, we work to protect, enhance and add value to your brand identity.

Our objective is always to maximize the performance of the brand as a business asset and to ensure that the holistic visual impression leads to a competitive advantage.

Brand Identity Management

Strategic consulting designed to meet brand challenges, improve processes and facilitate effective decision making.

Brand Transition

Guidance and support through all phases of a brand transition, be it a small refresh or high impact global rebrand following a merger or acquisition.

Brand Compliance

Proven audit and evaluation processes to inform strategic brand decisions and equip managers with the tools they need for strong brand governance.

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Published by V1360 Limited
v1360.com