Global Brand Equity Research Study
Conducted October 2019 for January 2020 Valuations
Overview and Introduction
More than **50,000 consumers** surveyed each year

Our large sample sizes ensure that market trends are accurately reflected, outliers are clearly identified, and significantly eliminates any margin for error.

New for 2019-20: **B2B research** covering insurance and banking brands in 10 key markets
29 countries covered in the latest research

Our study aims to accurately gauge a global perspective of brand performance in the minds of consumers.
Over **5,000 brands** valued each year

*Brand Finance* has been working for the last 14 years compiling valuations of the most valuable brands in the world.
Key metrics across all industries and brands

Brand Finance is at the forefront of Brand Equity Research and captures key measures such as consideration, usage, preference, NPS and loyalty.

We are now into our 4th year of historic data.
Brand Equity Research Coverage 2019-20
Original market research in 29 countries and across 10 sectors*

Australia
Brazil
Canada
China
Finland
France
Germany
India
Indonesia
Italy
Japan
Malaysia
Mexico
Middle East
Netherlands
Norway
Poland
Portugal
Romania
Russia
Saudi-Arabia
Singapore
South Africa
South Korea
Spain
Sri Lanka
Sweden
Switzerland
Thailand
Turkey
UAE
UK
USA
Vietnam

*Not all categories are covered in every country
Sector Coverage
Research encompasses brands across 10 sectors*

- Airlines
- Banks
- Insurance
- Utilities
- Technology
- Automobiles
- Restaurants
- Apparel
- Supermarkets
- Telecoms

Covered in previous waves
- Beer
- Oil & Gas
- Hotels & Leisure

*Not all categories are covered in every country
The Brand Finance Equity Research Covers Over 2000 Brands Globally

We analyse a wide portfolio of brands across various geographical locations
Why Brand Equity Surveys are Essential for Strategic Decision making

Brand equity measurement sits at the heart of brand evaluation and is an important process for any branded business.

Broader brand perceptions from surveys still relevant and valuable
- Are indicative of overall brand health and predictive of future revenues.
- Identify brand strengths and weakness.
- Evidence from Koen Pauwels & others reaffirms the continued relevance of survey measures.

The ‘marketing funnel’ is a key construct
- Measures such as familiarity, consideration, preference, are important indicators.
- But we also need to understand the factors which drive consideration and purchase.

Advocacy & Word-of-Mouth contribute significantly to brand growth
- Online and real-world social reputation can and should be tracked.

Mental & physical availability, distinctive brand assets all important
- *How Brands Grow* - Byron Sharp compelling evidence that these are crucial growth drivers; these can and should be measured.
## How Do Clients Use Our Research?

### Applications, benefits and scope

<table>
<thead>
<tr>
<th>Applications</th>
<th>Benefits</th>
<th>Scope</th>
</tr>
</thead>
</table>
| **Insight/Strategy** |  • Cost-effective annual brand tracking & snapshots  
  • Improved internal understanding of brand  
  • Measurement of relative brand performance on key choice attributes |  • Brand-focussed  
  • Strategic brand perspective not short-term campaign assessment |
| **Benchmarking** |  • High-level benchmarking – direct competitors and across categories  
  • Large number of competitors in each market  
  • Validation of brand positioning vs competition |  • Complementary to existing continuous Brand and Ad tracking/research |
| **Understanding** |  • Diagnose brand strengths and weaknesses  
  • Understand profiles of emerging brands  
  • Identify what drives consideration, preference and intention to switch | |

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Survey Design – B2C
Geographic coverage of all key markets

Survey Design

- Online questionnaire
- Survey duration – 20 minutes
- Surveys are conducted in local languages - official language(s) of the market in question
- Surveys are compatible with PC/laptop and mobile phones
- Respondents evaluate brands in 2-4 categories
- Appropriate screening criteria applied to ensure respondents meet the specific requirements for each category

Geographic Coverage & Sample Size

- Data collected in 29 markets with a sample size of over 50,000 adults (500-5,600 per market), representative of each country’s (online) population
- Data is weighted to reflect the age, gender, region and (where relevant) ethnic profile of the population

Fieldwork dates:

- Online fieldwork is conducted annually in September/October each year

Quality Control

1. All of Brand Finance research adheres to ESOMAR/ICC Code of Conduct requirements.

3. Our brand evaluations and valuations follow ISO (10668/20671) best practice, and are vetted by the Marketing Accountability Standards Board

3. Our QC follows processes to eliminate bots, data speeders and other signals of poor data quality.
Survey Design – B2B
Geographic coverage of all key markets

Survey Design

• Online questionnaire
• Survey duration – 10-15 minutes
• Surveys are conducted in local languages - official language(s) of the market in question
• Surveys are compatible with PC/laptop and mobile phones
• Respondents evaluate brands in banking and insurance – assuming they are decision-makers or senior-level influencers within each category

Geographic Coverage & Sample Size

• Data collected in 10 markets with a sample size of over 5,000 business decision-makers and influencers

Fieldwork dates:

• Online fieldwork is conducted annually in September/October each year

Quality Control

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Survey Methodology and Quality Control

Surveys are conducted online

Key Content:
- **Brand KPIs**: familiarity, consideration, usage, preference, satisfaction, recommendation and intention to switch.
- Core functional & emotional brand attributes gathered for brands familiar with
- Optional driver analysis run to identify which attribute perceptions most strongly drive key outcomes such as brand consideration, brand preference, and brand loyalty

Research Partners:
- Brand Finance selects ‘best-in-class’ online research panel/sampling providers in conjunction with our lead fieldwork partners, **Alligator** and **Toluna**
Accessing our Data and Insights

Equity Data is available in two different formats: via the online portal or through an in-depth Brand Value report.

**Brand Directory**

Brand Equity Data is made available through the Brand Directory. Data is displayed in various reporting formats such as tables and graphs. Data can then be downloaded. Data starts at £500 ex VAT per industry per market.

**Brand Valuation Reports**

Data is available in the form of Brand Valuation reports which provide an in-depth analysis of a specific brand and a chosen competitor set.
Questionnaire Overview
What Do We Ask People?

Brand Funnel
Key measures of brand awareness and consideration

- **Awareness**
  - Have heard of you

- **Familiarity**
  - Know something about you

- **Consideration**
  - Would consider buying/using you

- **Preference**
  - Prefer you to all other brands

- **Loyalty**
  - Brand user who intends to stay loyal

Other brand KPI’s
- Overall reputation
- Emotional closeness
- Recommendation (Net Promoter Score)
- Word-of-mouth – have you discussed this brand with anyone recently? Positively or negatively

Plus relevant diagnostics & detail
- Key functional and emotional image dimensions
- Demographics
- Selected category behaviour/ownership data

*B2C only
# Questionnaire (1)

<table>
<thead>
<tr>
<th><strong>Screening/quota questions</strong></th>
<th><strong>B2C: Gender, age, region  B2B: Gender, Company type/size, region, role/position &amp; decision-making/influence</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Category qualification questions</strong></td>
<td><strong>Airlines. In the past 12 months, have you taken a flight for either business or leisure purposes</strong></td>
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<tr>
<td></td>
<td><strong>Auto:. Does anyone in your household own or lease a car, van or motorcycle, or plan to buy one in the next 6 months</strong></td>
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<tr>
<td></td>
<td><strong>Insurance. Do you take out any insurance cover?</strong></td>
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<td></td>
<td><strong>Restaurants: How often do you eat out or order take-away food?</strong></td>
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<tr>
<td></td>
<td><strong>Supermarkets. Are you responsible for household food/grocery shopping?</strong></td>
</tr>
<tr>
<td></td>
<td><strong>Utilities. Are you the decision maker or joint decision maker of any utility bills</strong></td>
</tr>
<tr>
<td><strong>Awareness &amp; Familiarity</strong></td>
<td><strong>For each of the following brands, please indicate how well you know them</strong></td>
</tr>
<tr>
<td><strong>Usage</strong></td>
<td><strong>Have you used this brand’s products or services before?</strong></td>
</tr>
<tr>
<td><strong>Consideration</strong></td>
<td><strong>Which brands would you consider using in the future and which would you not consider using?”</strong></td>
</tr>
<tr>
<td><strong>Preference</strong></td>
<td><strong>Of the brands which you indicated you would consider, please indicate which one you most prefer?</strong></td>
</tr>
<tr>
<td><strong>Quality</strong></td>
<td><strong>How would you rate the quality of this brand’s products/services compared to competing brands products/services?</strong></td>
</tr>
<tr>
<td><strong>Reputation</strong></td>
<td><strong>How strong, in your opinion, is this brand’s overall reputation?</strong></td>
</tr>
<tr>
<td><strong>Emotional Closeness</strong></td>
<td><strong>How close do you feel to this brand</strong></td>
</tr>
<tr>
<td><strong>Recommendation (NPS)</strong></td>
<td><strong>How likely are you to recommend this product/service amongst your friends and family?</strong></td>
</tr>
<tr>
<td><strong>Loyalty/Switching</strong></td>
<td><strong>How likely are you to continue using this brand beyond the next 12 months?</strong></td>
</tr>
</tbody>
</table>

* B2C only
### Questionnaire (2)

| Word of Mouth* | Thinking about the past 7 days, have you had any kind of conversation or exchange of views about <BRAND> with someone else such as a friend, family member, work colleague or social media connection.

In your most recent conversation/exchange/post, how positive or negative about <BRAND> were you and those you ‘talked’ to? |
|---|---|

| Brand Image | Which of these statements, if any, do you think apply to <BRAND>:

- Easy to deal with
- Genuinely offer something different
- Care more about profits than customers
- Innovative
- Excellent website & apps
- I don’t trust them

- A step ahead of the competition
- Expensive/overpriced
- Care about the wider community
- Popular with my friends
- A symbol of success
- Great customer service

- Helps meet our business goals#
- Reliable# |

<table>
<thead>
<tr>
<th>Category Behaviour*</th>
<th>Airlines: How many trips by air have you taken in the past year for business or leisure?</th>
</tr>
</thead>
</table>

| Additional Profiling* | Auto: Are you likely to buy another car or van in the next 6 months (new or used)? |

|  | Banks: Which of these banking products and services do you have now, and which are you seeking new providers/solutions for either now or in the near future |

|  | Technology & Telecoms. Which of these types of technology product do you currently own, and which are you looking to buy/replace in the next 6 months? |

|  | Marital Status, Presence of Children, Ethnicity |

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*B2C

# B2B
# Sample & Sector Coverage in 2019

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<tr>
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</thead>
<tbody>
<tr>
<td></td>
<td>Airline</td>
<td>Apparel</td>
<td>Automobiles</td>
</tr>
<tr>
<td>Australia</td>
<td>1,500</td>
<td>✓</td>
<td>✓</td>
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<tr>
<td>Brazil</td>
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<tr>
<td>France</td>
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</tr>
<tr>
<td>Germany</td>
<td>2,501</td>
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<td>Italy</td>
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<td>Malaysia</td>
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<tr>
<td>Saudi Arabia</td>
<td>667</td>
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<td>USA</td>
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<tr>
<td>Vietnam</td>
<td>500</td>
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Data starts at £500 ex VAT per industry per market (displayed as tick marks above). *500 respondents in each market for B2B
Our Brand Evaluation Services
How are brands perceived in my category?

Brand Finance tracks brand fame and perceptions across 29 markets in 10 consumer categories (+ banking and insurance in B2B)

Clear, insightful signals of brand performance, with data mining options for those who want to dig deeper – all at an accessible price.
What if I need more depth or coverage of a more specialised sector?

Our bespoke brand scorecards help with market planning and can be designed to track multiple brands over time, against competitors, between market segments and against budgets. Our 31-country database of brand KPIs enables us to benchmark performance appropriately.
Do I have the right brand architecture or strategy in place?

Research is conducted in addition to strategic analysis to provide a robust understanding of the current positioning. The effectiveness of alternative architectures is tested through drivers analysis, to determine which option(s) will stimulate the most favourable customer behaviour and financial results.
How can I improve return on marketing investment?

Using sophisticated analytics, we have a proven track record of developing comprehensive brand scorecard and brand investment frameworks to improve return on marketing investment.
What about the social dimension? Does my brand get talked about?

Social interactions have a proven commercial impact on brands. We measure actual brand conversation and advocacy, both real-world word of mouth and online buzz and sentiment, by combining traditional survey measures with best-in-class social listening.
About Us

Founded in 1996, we are the world’s leading independent brand valuation consultancy.

Brand Finance exists to help clients build successful, admired and effective brands. And for 20 years we have helped organisations evaluate marketing programmes, and marketing teams present their case in the Board Room.

We combine creative thinking and brand strategy skills, with a clear focus on measuring effectiveness and value.

Our team of professionals, from a mixture of backgrounds, use customer insight, market analysis and brand valuation techniques to analyse the impact of brand and marketing decisions on company profitability and growth potential.

Every year Brand Finance values over 5,000 brands across all sectors and geographies. The results are tabulated and published in the media to raise awareness of brands as valuable business assets to be carefully managed.
Contact us

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Brand Finance is the leading brand valuation and strategy firm, helping companies to manage their brands for improved business results.

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