



# Canada 100 2019

The annual report on the most valuable and strongest Canadian brands

May 2019

# Contents.

---

About Brand Finance	4
Get in Touch	4
Request Your Brand Value Report	5
Foreword	6
Brand Value Analysis	8
Canada's Strongest Brands	12
New Entrants	13
Regional Analysis	14
Brand Spotlight: TELUS	16
Interview with Jill Schnarr	17
Brand Spotlight: Canadian Tire	18
Interview with Susan O'Brien	19
Interview with Ian Madell	20
Brand Finance Canada 100 (CAD m)	22
Definitions	24
Brand Valuation Methodology	26
Market Research Methodology	27
Stakeholder Equity Measures	27
Consulting Services	28
Brand Evaluation Services	29
Communications Services	30
Brand Finance Network	32

# About Brand Finance.

**Brand Finance** is the world's leading independent brand valuation and strategy consultancy.

Brand Finance was set up in 1996 with the aim of 'bridging the gap between marketing and finance'. For more than 20 years, we have helped companies and organisations of all types to connect their brands to the bottom line.

We pride ourselves on four key strengths:

- + Independence
- + Transparency
- + Technical Credibility
- + Expertise

We put thousands of the world's biggest brands to the test every year, evaluating which are the strongest and most valuable.

Brand Finance helped craft the internationally recognised standard on Brand Valuation – ISO 10668, and the recently approved standard on Brand Evaluation – ISO 20671.



## Get in Touch.

For business enquiries, please contact:

**Charles Scarlett-Smith**

Marketing Director, Brand Finance Canada  
c.scarlett-smith@brandfinance.com

For media enquiries, please contact:

**Konrad Jagodzinski**

Communications Director  
k.jagodzinski@brandfinance.com

For all other enquiries, please contact:

enquiries@brandfinance.com  
+44 (0)207 389 9400

For more information, please visit our website:  
[www.brandfinance.com](http://www.brandfinance.com)

[linkedin.com/company/brand-finance](https://www.linkedin.com/company/brand-finance)

[twitter.com/brandfinance](https://twitter.com/brandfinance)

[facebook.com/brandfinance](https://facebook.com/brandfinance)

**Brand Finance®**  
Brandirectory

**The world's largest brand value database.**

Visit to see all Brand Finance rankings, reports, and whitepapers published since 2007.

[www.brandirectory.com](http://www.brandirectory.com)

## Request Your Brand Value Report.

A Brand Value Report provides a complete breakdown of the assumptions, data sources, and calculations used to arrive at your brand's value.

Each report includes expert recommendations for growing brand value to drive business performance and offers a cost-effective way to gain a better understanding of your position against competitors.

### What is a Brand Value Report?

#### Brand Valuation Summary

- + Internal understanding of brand
- + Brand value tracking
- + Competitor benchmarking
- + Historical brand value

#### Brand Strength Index

- + Brand strength tracking
- + Brand strength analysis
- + Management KPIs
- + Competitor benchmarking

#### Royalty Rates

- + Transfer pricing
- + Licensing/franchising negotiation
- + International licensing
- + Competitor benchmarking

#### Cost of Capital

- + Independent view of cost of capital for internal valuations and project appraisal exercises

#### Customer Research

- |             |             |
|-------------|-------------|
| + Utilities | + Tech      |
| + Insurance | + Auto      |
| + Banks     | + Hotels    |
| + Telecoms  | + Beers     |
| + Airlines  | + Oil & Gas |

For more information regarding our Brand Value Reports, please contact:

[enquiries@brandfinance.com](mailto:enquiries@brandfinance.com)

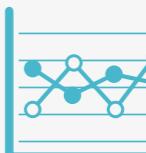
### What are the benefits of a Brand Value Report?



Insight



Strategy



Benchmarking



Education



Communication



Understanding

# Foreword.



**David Haigh**  
CEO, Brand Finance

What is the purpose of a strong brand: to attract customers, to build loyalty, to motivate staff? All true, but for a commercial brand at least, the first answer must always be 'to make money'.

Huge investments are made in the design, launch, and ongoing promotion of brands. Given their potential financial value, this makes sense. Unfortunately, most organisations fail to go beyond that, missing huge opportunities to effectively make use of what are often their most important assets. Monitoring of brand performance should be the next step, but is often sporadic. Where it does take place, it frequently lacks financial rigour and is heavily reliant on qualitative measures, poorly understood by non-marketers.

As a result, marketing teams struggle to communicate the value of their work and boards then underestimate the significance of their brands to the business. Sceptical finance teams, unconvinced by what they perceive as marketing mumbo jumbo, may fail to agree necessary investments. What marketing spend there is, can end up poorly directed as marketers are left to operate with insufficient financial guidance or accountability. The end result can be a slow but steady downward spiral of poor communication, wasted resources, and a negative impact on the bottom line.

Brand Finance bridges the gap between marketing and finance. Our teams have experience across a wide range of disciplines from market research and visual identity to tax and accounting. We understand the importance of design, advertising, and marketing, but we also believe that the ultimate and overriding purpose of brands is to make money. That is why we connect brands to the bottom line.

By valuing brands, we provide a mutually intelligible language for marketing and finance teams. Marketers then have the ability to communicate the significance of what they do, and boards can use the information to chart a course that maximises profits. Without knowing the precise, financial value of an asset, how can you know if you are maximising your returns? If you are intending to license a brand, how can you know you are getting a fair price? If you are intending to sell, how do you know what the right time is? How do you decide which brands to discontinue, whether to rebrand and how to arrange your brand architecture? Brand Finance has conducted thousands of brand and branded business valuations to help answer these questions.

Brand Finance's research revealed the compelling link between strong brands and stock market performance. It was found that investing in highly-branded companies would lead to a return almost double that of the average for the S&P 500 as a whole.

Acknowledging and managing a company's intangible assets taps into the hidden value that lies within it. The following report is a first step to understanding more about brands, how to value them and how to use that information to benefit the business.

The team and I look forward to continuing the conversation with you.

# Circle K, the World's Fastest Growing Retail Brand, Surges into Canadian Top 10.

- + Overtaking Tim Hortons, McCain, and Thomson Reuters, Circle K is now one of the top 10 most valuable brands of Canada
- + Registering an impressive 111% growth in brand value, Parkland Fuel is the nation's fastest-growing brand
- + Claiming the top 5 spots in the ranking for the first time, Canadian banks continue to punch above their weight on a global stage
- + Economic pressures reflecting on telcos as brand values dip
- + Brand Finance's Brand Strength Index ranks WestJet as Canada's strongest brand of 2019, with a score of 88.3 out of 100

# Brand Value Analysis.



## Circle K surges into top 10

Quebec-based Alimentation Couche-Tard's convenience store brand **Circle K** makes its debut in the top 10 of Canada's most valuable brands ranking, following a solid 67% growth in brand value to \$7.7 billion in 2019, according to the latest report by leading independent brand valuation consultancy, Brand Finance.

Circle K is the nation's fifth fastest-growing brand in the Brand Finance Canada 100 2019 report and was just recently revealed as the fastest-growing retail brand in the world. Alimentation Couche Tard is continuing to consolidate its brand portfolio of Statoil, Mac's, and Kangaroo Express under the singular Circle K brand, allowing it to jump up from 16<sup>th</sup> place last year to 10<sup>th</sup> in this year's ranking.

## Parkland Fuel, the fastest growing brand in Canada

Calgary-based **Parkland Fuel** is Canada's fastest growing brand of 2019, with outstanding brand value growth that comes on the heels of a successful acquisition of Ultramar and Chevron Canada's downstream business. Parkland Fuel has also sought to diversify its brand portfolio, adding the private label brand 59<sup>th</sup> Street Food Co to their gas station retail operations.

**The mono-brand approach bodes well for the growth of Circle K's future brand value and strength, not just in Canada, but around the world. Transitional periods are often associated with lower brand strength rating and score. Circle K's current brand strength is A+ with a Brand Strength Index score of 64.1 out of 100, which is bound to improve as the customer stakeholder equity - like familiarity, recommendation, consideration, and preference - transfers over from Mac's, Statoil, and Kangaroo Express.**

Charles Scarlett-Smith  
Marketing Director, Brand Finance Canada

## Canadian banks dominate

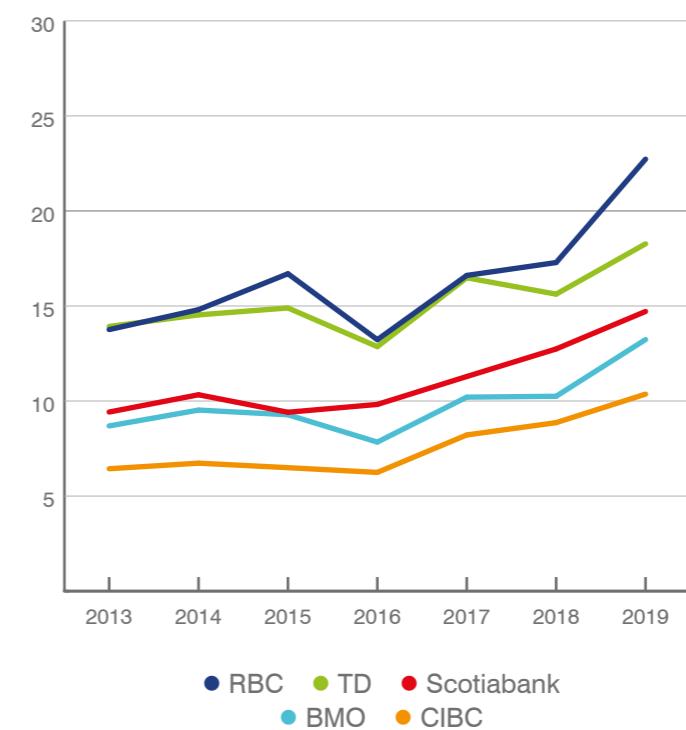
For the first time in the history of Brand Finance's Canada 100 ranking, all top 5 spots are occupied by banking brands. **RBC** defends its title of Canada's most valuable brand, following a strong 26% growth to \$22.7 billion. Higher than expected forecasted revenues and continued successful international expansion have spurred Canada's banking brand values and this year **TD** (\$18.2 billion) ranks 2<sup>nd</sup>, followed by **Scotiabank** (\$14.7 billion) taking 3<sup>rd</sup>. **BMO** (\$13.2 billion) and **CIBC** (\$10.3 billion) are in 4<sup>th</sup> and 5<sup>th</sup> place respectively.

Among the world's 500 most valuable banking brands, the combined brand values of Canadian banks now totals \$87.5 billion, as they continue to push their presence internationally, reaping the rewards of their stable and trustworthy reputations. For the first time ever, the cumulative value of Canadian banking brands outstrips the total value of UK banking brands, coming behind only the US and China.

## Top 10 Most Valuable Brands

	<b>1</b>	→ 1	
	2019: C\$22,726m	+31.7%	2018: C\$17,258m
	<b>2</b>	→ 2	
	2019: C\$18,270m	+16.9%	2018: C\$15,623m
	<b>3</b>	↑ 4	
	2019: C\$14,712m	+15.5%	2018: C\$12,740m
 Bank of Montreal	<b>4</b>	↑ 5	
	2019: C\$13,234m	+29.1%	2018: C\$10,249m
	<b>5</b>	↑ 8	
	2019: C\$10,363m	+16.9%	2018: C\$8,862m
	<b>6</b>	↓ 3	
	2019: C\$10,332m	-23.6%	2018: C\$13,518m
	<b>7</b>	→ 7	
	2019: C\$8,966m	-6.7%	2018: C\$9,612m
	<b>8</b>	↑ 9	
	2019: C\$8,796m	+4.9%	2018: C\$8,385m
	<b>9</b>	↓ 6	
	2019: C\$8,689m	-11.7%	2018: C\$9,844m
	<b>10</b>	↑ 16	
	2019: C\$7,668m	+67.5%	2018: C\$4,578m

## Brand Value Over Time (CAD bn)



## Brand Value by Country - Banking Sector



Sector	Brand Value (CAD bn)	% of total
China	406.9	30.0%
United States	297.0	21.9%
Canada	67.5	5.0%
United Kingdom	65.4	4.8%
France	42.6	3.1%
Japan	41.6	3.1%
Rest of the World	435.7	32.1%
Total	1356.8	100.0%

## Canada 100 Ranking - Brand Value by Sector



Sector	Brand Value (CAD bn)	% of total
Banking	87.6	30.4%
Telecoms	34.8	12.1%
Retail	31.1	10.8%
Oil & Gas	28.4	9.9%
Insurance	19.3	6.7%
Food	13.0	4.5%
Other	74.2	25.7%
Total	288.4	100.0%

## Telecom brands dip

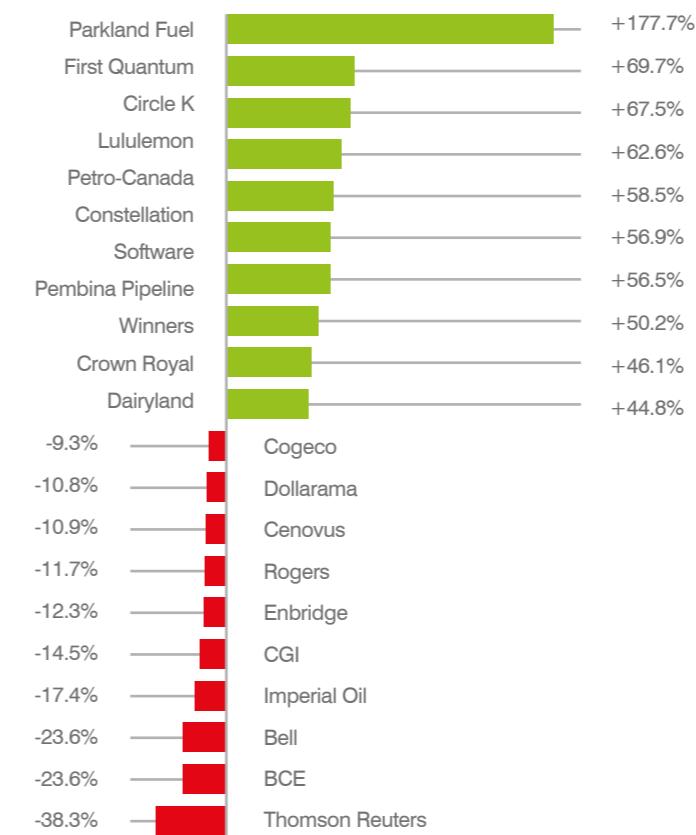
Canadian telco giants **Bell** (down -24% to \$10.3bn), **TELUS** (down -7% to \$8.9bn), and **Rogers** (down -12% to \$8.6bn) all decreased in brand value this year, a result of wider economic pressures, increased price competition, and decreasing margins in an increasingly competitive space. Outside of the country's big three, the story tells a similar tale: **BCE** and **Cogeco**, also decreased in brand value.

Going against this trend is **Videotron**, growing 18% in brand value to \$2 bn. Despite the brand's relatively smaller size, it has performed well in terms of brand equity, registering high levels of consideration, preference, and recommendation setting a path for strong potential for growth.

Sponsorship is one of the main battlegrounds for telco brand awareness. Rogers, Bell, and TELUS lead the charge and are willing to spend tens of millions of dollars in sponsorship endeavours. Sponsorships are essential, but their efficacy is harder to track internally. As margins continue to be squeezed, evaluating the ROI on sponsorship will be front and centre in the coming years.



## Brand Value Change 2018-2019 (%)



The Parkland Fuel brand grew this year by a whopping 111% to a total value of \$679m, reflected in a rise in the Canada 100 ranking from 98<sup>th</sup> to 76<sup>th</sup> overall. According to their annual report, Parkland Fuel continues to seek out acquisition's opportunities, this approach coupled with strong year over year financial results and forecast revenues. This all points towards continued brand value growth in the years to come.

Alex Haigh  
North America Director Brand Finance

# Canada's Strongest Brands.

Aside from calculating overall brand value, Brand Finance also determines the relative strength of brands through a balanced scorecard of metrics that look at marketing investment, stakeholder equity, and the impact of those on business performance. Along with the level of revenues, brand strength is a crucial driver of brand value.

## Airlines: **WESTJET**

For second consecutive year, WestJet features as Canada's strongest brand with an improved Brand Strength Index (BSI) score of 88.3 out of 100, and a corresponding brand rating of AAA. The airline scored well on aspects related to consideration, familiarity, preference, recommendation, and reputation, far outperforming the average in the airline sector.



## Spirits: **Crown Royal**

Crown Royal has set its roots deep into Canada's DNA. This year, Crown Royal is the second strongest brand in Canada, and the strongest alcohol and spirits brand in the world. It is one of only two brands in the Canda 100 to achieve an AAA brand rating with a brand strength index score of 86.8 out of 100. With the backing of parent company Diageo, Crown Royal has fast become an international brand, beloved globally, not just by Canadians.

## Retail: **Canadian Tire**

Canadian Tire maintains the title of Canada's strongest Retail brand with a brand strength index score of 78.8, scoring well in brand investment measures, as reflected in their successful brand promotion and marketing campaigns. CTC's overall portfolio of brands, including SportChek and Gas+, is valued at \$5.2 billion. With the successful acquisition of Helly Hansen, this number is only set to grow.

## Telco: **TELUS**

TELUS with its AAA- brand rating and a Brand Strength Index (BSI) score of 84.7 out of 100, maintains the title as Canada's strongest telecoms brand, and is the third strongest brand in the ranking. Backed up by high innovation, reputation, and solid CSR scores, the TELUS brand has remained relatively immune to broader environmental and economic changes in the Canadian telecoms market.

## Food: **McCain**

The McCain brand has moved from strength to strength with an improved brand strength score of 75.8, and brand rating of AA+. McCain is the global leader in the frozen foods market, which is only set to grow in the years to come.

## Insurance: **[intact]**

Intact is this year's strongest Insurance brand taking the top spot from Sun Life, with a brand strength score of 81.7, and a brand rating of AAA-. Achieving high scores across the board, Intact registers particularly strong results in brand preference, recommendation and reputation.

# New Entrants.

## New Entrants

<b>Nutrien</b>	40		2019: C\$2,038m A+
<b>WSP</b>	80		2019: C\$649m A+
<b>Emera</b>	82		2019: C\$585m A+
<b>NEW FLYER</b>	85		2019: C\$557m A-
<b>A&amp;W</b>	87		2019: C\$550m AA
<b>Sealtest</b>	88		2019: C\$550m A-
<b>Québon</b>	91		2019: C\$495m A-
<b>Colliers INTERNATIONAL</b>	92		2019: C\$472m A+
<b>tc • TRANSCONTINENTAL</b>	94		2019: C\$469m A+
<b>Gibsons</b>	95		2019: C\$463m A-
<b>Seagram's</b>	96		2019: C\$456m AA
<b>enerPLUS</b>	100		2019: C\$413m A+

# Regional Analysis.

## British Columbia

A total of six companies from BC are featured in the Brand Finance Canada 100 2019, a relatively low number of brands when compared against the size of the province's economy. Largely a reflection of Toronto's domination as Canada's corporate capital, the west coast province is home to some of the most exciting brands in the Canada 100.

Athletic-wear disruptor **Lululemon** is this year's second fastest growing brand in Canada. As one of the youngest brands in the table, Lululemon still has plenty of room to assert itself on a global stage. This, backed up by plans to open more international locations and diversify its brand offerings to target wider audiences and activities.

Although less in the limelight, **First Quantum** are the fourth fastest growing brand in Canada and now the third most valuable brand in BC. Recent plans to expand its Cobre Panama copper development project indicate that the First Quantum brand is set to increase its already strong margins.

## Alberta

It should come as no surprise that Alberta's Top 5 is dominated by oil and gas brands. The Albertan economy is still recovering from the recession that plunged the province into economic turmoil in 2015 and 2016, and the continued uncertainty over the trans mountain pipeline is reflective of the somewhat sputtering progress that has been made over the last four years.

Things are not all doom and gloom however, on average Albertan brands are up 16% in brand value. On the retail side of the Oil and Gas sector, **Parkland Fuel** is the fastest growing brand in Canada, up 111%. **Petro-Canada** has also seen a substantial increase in brand value up 23% to \$2,432m, making it the 6<sup>th</sup> most valuable Albertan brand. Posting strong margins in 2018, **CP** is the 4<sup>th</sup> fastest growing brand in Alberta, and has moved up one spot to be the 3<sup>rd</sup> most valuable Albertan brand, displacing **Shaw**. Edmonton's WestJet is also one of only two brands in the ranking to score a AAA brand rating.

The next few years are crucial to Albertan brands, particularly in the Oil & Gas sector. There is still a long way to go until halcyon days return to Alberta.

## Top 5 Brands in British Columbia

	<b>TELUS</b>	<b>1</b>	← 1	
		2019: C\$8,966m		-7.0%
		2018: C\$9,612m		
	<b>lululemon athletica</b>	<b>2</b>	← 2	
		2019: C\$2,997m		+79.0%
		2018: C\$1,677m		
	<b>FIRST QUANTUM MINERALS LTD.</b>	<b>3</b>	↑ 5	
		2019: C\$787m		+70.0%
		2018: C\$464m		
	<b>FINNING</b>	<b>4</b>	↓ 3	
		2019: C\$708m		+18.0%
		2018: C\$598m		
	<b>A&amp;W</b>	<b>5</b>	— NEW	
		2019: C\$550m		-
		2018: -		

## Top 5 Brands in Alberta

	<b>Canadian Natural Resources</b>	<b>1</b>	↑ 2	
		2019: C\$5,962m		+7.0%
		2018: C\$5,549m		
	<b>ENBRIDGE</b>	<b>2</b>	↓ 1	
		2019: C\$5,235m		-12.0%
		2018: C\$5,968m		
	<b>SUNCOR ENERGY</b>	<b>3</b>	← 3	
		2019: C\$3,154m		-6.0%
		2018: C\$3,357m		
	<b>CP Logistics Inc.</b>	<b>4</b>	↑ 5	
		2019: C\$2,903m		+26.0%
		2018: C\$2,302m		
	<b>Shaw</b>	<b>5</b>	↓ 4	
		2019: C\$2,687m		+2.0%
		2018: C\$2,639m		

## Ontario

Toronto is Canada's financial hub. It's embedded in the city's landscape, you only need to look up to see a city skyline that's dominated by banking brands. A total of 39 Ontarian brands make this year's Top 100, more than any other province. Most of those 39 brands are in Toronto and the GTA. The top 4 brands in Ontario are also in the top 5 nationally.

**Brookfield** is new to the top 5 this year, displacing **Rogers** which fell to 6<sup>th</sup> overall in Ontario. Constellation Software is the fastest growing brand in Ontario, growing 55% this year and rising 12 spots to 41<sup>st</sup> overall. The Waterloo based software brand continues to outdo analyst expectations and has become a brand to watch.

Following a rocky 2018, **Tim Hortons** is Ontario's strongest brand with a brand rating of AAA-. Although their Canadian consumer base may still be reeling from last year controversies, the fast-food coffee chain continues to grow internationally. Tim Hortons has now expanded to the US, Mexico, Europe, the Philippines, Middle East, and China. For the new store opening in Shanghai it was reported that customers waited for 6 hours for a double-double, a wait time even the most patient Canadian rush-hour customer would balk at.

## Quebec

Quebec is home to 32 of Canada's top 100 brands in the Brand Finance Canada 100 2019. Although in recent years Quebec's economy has played second fiddle to its neighbouring Ontario, there are signs that the tides are slowing shifting. On average, Quebec brands increased in value by 19%, the highest of any province in Canada.

Quebec is home to many of Canada's traditional brands, which is reflected in the Top 5, and it is fast becoming a hub for emerging technologies. This drive has centred around Montreal, now a global hub for the AI, VFX, video-game, aerospace and information-technology sectors.

Government incentives, low operating and real-estate costs are also continuing to draw outside interest. Quebec is now firmly an attractive province for investment, an unimaginable thought 35 years ago.

## Top 5 Brands in Ontario

	<b>RBC</b>	<b>1</b>	← 1	
		2019: C\$22,726m		+32.0%
		2018: C\$17,258m		
	<b>TD</b>	<b>2</b>	← 2	
		2019: C\$18,270m		+17.0%
		2018: C\$15,623m		
	<b>Scotiabank</b>	<b>3</b>	← 3	
		2019: C\$14,712m		+15.0%
		2018: C\$12,740m		
	<b>CIBC</b>	<b>4</b>	↑ 5	
		2019: C\$10,363m		+17.0%
		2018: C\$8,862m		
	<b>Brookfield</b>	<b>5</b>	↑ 6	
		2019: C\$8,889m		+6.0%
		2018: C\$8,385m		

## Top 5 Brands in Quebec

	<b>BMO Bank of Montreal</b>	<b>1</b>	↑ 2	
		2019: C\$13,234m		+29.0%
		2018: C\$10,249m		
	<b>Bell</b>	<b>2</b>	↓ 1	
		2019: C\$10,332m		-24.0%
		2018: C\$13,518m		
	<b>CIRCLE K</b>	<b>3</b>	↑ 4	
		2019: C\$7,668m		+67.0%
		2018: C\$4,578m		
	<b>CN</b>	<b>4</b>	↓ 3	
		2019: C\$6,009m		+9.0%
		2018: C\$5,507m		
	<b>Desjardins</b>	<b>5</b>	← 5	
		2019: C\$4,926m		+35.0%
		2018: C\$3,661m		

# Brand Spotlight: TELUS.



Subsequent to the mergers of BCTel, AGT, and Clearnet in 1999, the TELUS brand as we know it today, has continued year on year to solidify its status as one of the big 3 telecoms companies in Canada. This year TELUS is the second most valuable Canadian telecoms brand (passing Rogers), with a total brand value of \$8,966m.

The backbone of TELUS' branding success is in its brand strength. TELUS is the strongest Canadian telco brand and third strongest brand in the Canada 100 table, with a brand strength index score of 84.4 and brand rating of AAA-.

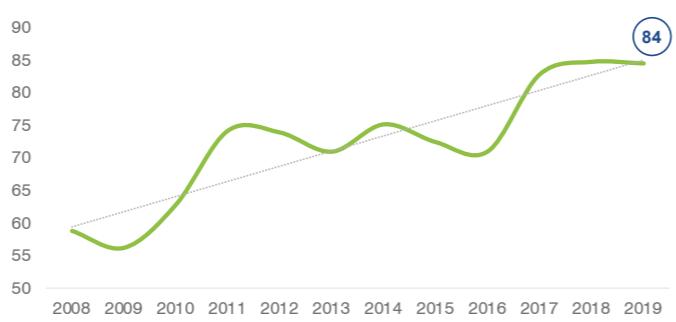
One of the key pillars of TELUS' brand strength is the company's consistent investment in building strong ties with the Canadian public, from both a customer service and a social responsibility standpoint. Of the premium carriers, TELUS scored highest in corporate social responsibility\* (CSR), and reputation.

Another future-facing pillar of TELUS' brand is in customer experience enhancement and innovation. Brand Finance market research shows that TELUS is the top Canadian telecoms brand in terms of quality and innovation.

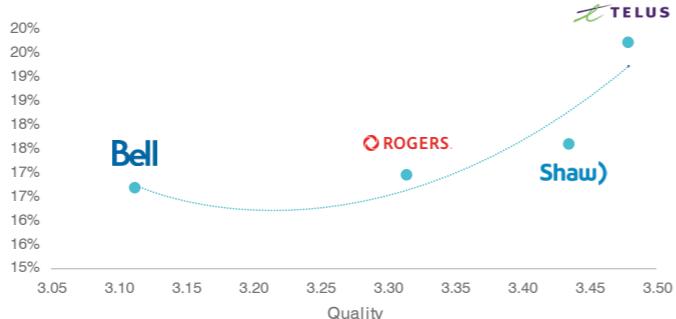
Of the premium carriers, TELUS still has room to establish itself in the Canadian telecoms market. As the market trends towards a saturation point, and competitive rates continue to shrink profit margins, building and maintaining a strong brand has never been more essential for brand value growth.



## Brand Strength Over Time (2008-2019)



## Innovation / Quality



\*Source: CSRHub; we looked at Community, Governance, Environment and Employee scores

# Interview with Jill Schnarr.



**Canadian telecoms brands are ubiquitous, but that often results in a reputation of being disconnected from the Canadian public. How does TELUS break the mould?**

We break the mould because TELUS leads the world in respect to social capitalism. We use our core connectivity and technology to serve a greater social purpose that benefits all of our stakeholders, from employees to those marginalized in society.

Thanks to the extraordinary dedication and generosity of our TELUS team members and extended family, since 2000, we have contributed \$1.2 billion, through \$682 million in financial support and 1.3 million days of volunteerism. This past year, 36,000 volunteers participated in our TELUS Days of Giving events across the country, enabling 1 million hours of volunteer service donated in both 2017 and in 2018. With the spirited volunteerism of the 85,000 team members and retirees worldwide, TELUS is the most giving company in Canada.

## Over the last decade corporate social responsibility (CSR) has become a key part of brand building – where does CSR slot into TELUS's branding goals?

Corporate social responsibility, or what we call 'Social Purpose', is core to what we stand for as a brand. At TELUS, our social purpose is to leverage our world-leading technology to enable remarkable human outcomes in our all-connected world. Social purpose is built into our strategy, technology investments and culture. It is also explicitly aligned with our brand and the promise it represents: innovation, simplicity and driving social change.

This past year, we contributed \$150 million, representing 7% of pre-tax profits to charitable organizations across Canada, more than any other company in Canada, all guided by our philosophy: we give where we live.

## Now that the traditional telco business is maturing, how is the TELUS brand able to drive continued growth in emerging opportunities?

With TELUS Health, we are harnessing the power of our network infrastructure to digitize the healthcare ecosystem. In fact, we have invested more than \$2.5B over the last decade to revolutionize access to care and facilitate the seamless flow of information to improve health outcomes and patient experience, including the recent launch of Babylon by TELUS Health.

Driving investment and innovation in technologies that bridge geographic and socio-economic divides and support more vibrant, healthier and sustainable communities is central to the TELUS brand.

## What trends in Canadian Telecoms branding can we expect to see over the next year?

The top three trends in telecom branding that we can expect to see over the next year include enhanced storytelling, improved content creation, and continued digital innovation to support customer experience. We believe that creative storytelling will be a key differentiator for the brand leaders in telecommunications.

Brands that tell stories about human connections with authenticity will win. To support this storytelling, brands will also need to become experts in improving how they create and access new content. Moreover, we need to be able to tell these stories and meaningfully connect with customers in digital and social media.

# Brand Spotlight: Canadian Tire.



Equipped with the experience of serving Canadians for 97 years, the strength of the Canadian Tire brand and its heritage is recognised from coast-to-coast. However, heritage alone cannot support a business facing the challenges posed by Amazon, which recently revealed that Amazon Prime orders in Canada doubled in 2018.

Despite these challenges, Canadian Tire has regained brand value since 2016, with a 19% year-on-year growth in Brand Value this year. Offering not simply customer focus, but Canadian customer focus, Canadian Tire has evolved with the nation. Firstly, tires to meet the demand of an increasingly industrialised nation in the 1920s. Then, camping gear to suit the leisure pursuits of Canadians, and now the current wide variety of affordable goods to rapidly and conveniently facilitate busy and eventful Canadian lives.

However, the Canadian connection with the brand extends beyond its products; the emotive commercials that nod to the legendary 'Albert' advertisements, the ambitious and highly Canadian "Ice Truck" World record attempt, investment in the community through programmes such as Jumpstart, and continued high-profile sporting sponsorships such as the 2018 Winter Olympic partnership. This continued promotion and recognition of the Canadian Tire brand led Brand Finance to assess the brand strength as AA+ rated.



## Brand Value

7 8

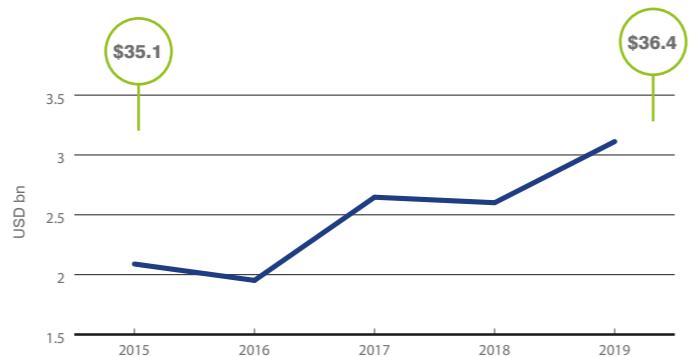
2019: C\$3,755m +18.5%  
2018: C\$3,168m

## Brand Strength

8 8

BSI 2019: 82.3 +0.7  
BSI 2018: 81.6

## Brand Value over Time (2006-2019)



# Interview with Susan O'Brien.



**Susan O'Brien**  
Senior Vice President  
Marketing,  
Canadian Tire

### The new era of digital retailing has created a lot of casualties: how do you assess your preparedness for the new era?

In a time when retail is undergoing such a dramatic transformation, we are constantly looking at new ways to meet our customers expectations. We look at all metrics we have traditionally tracked and have also added a whole new set that help us monitor our customer engagement- from Net Promoter Score (NPS) to improved measures of Marketing ROI like Return on Ad Spend (ROAS). And of course, we use our rich customer data to help us test and measure new approaches and initiatives.

### Owned Brands are a key component of Canadian Tire's go-forward strategy – could you illustrate the impact of this strategy on your Brand?

Owned brands will continue to be a key element of our growth strategy. We look to differentiate ourselves by offering unique, high quality products which can only be found in our stores and offer a meaningful margin advantage.

We are putting the customer at the heart of our business strategy and decision-making, bringing them the latest and greatest products and engaging them through exciting marketing campaigns like 'We Do New', which puts a spotlight on the hottest innovative products. We do believe our strength in building and marketing our owned brands has been key to helping reinvent the Canadian Tire brand over the years.

### What is the role of Triangle loyalty and credit cards in the company's long-term strategy?

Triangle Rewards was developed to attract new customers, increase engagement and relevance, and create more loyal lifetime customers. It is enabling us to do this because it provides such rich data, informing a single view of our customer and their needs, wants and preferences.

We have attracted over two million new customers since Triangle Rewards was launched, creating the fastest growing loyalty and credit card program in Canada.

We now have over 12 million loyalty members who are shopping across our banners and receiving personalized offers for shopping within our marketplace. Making the transition from mass merchant to a one-to-one retailer is not easy, however we now have 60% of our customers shopping across our banners at Mark's, SportChek and Canadian Tire Retail using Triangle Rewards.

### What trends in Canadian retail can we expect to see over the next year?

We believe the biggest trend in retail branding is personalization – creating unique, customized solutions and communications that show greater relevance to Canadians. And we believe the strength of our Triangle Rewards program, our enormous digital and physical footprint and our strong relationship with Canadians is setting us up well for that personalization journey.

# Interview with Ian Madell.



**Ian Madell**  
Managing Partner,  
President,  
LEVEL5 Strategy Group

## **Banking and Telecoms brands are some of the most established brands in Canada. What are some emerging sectors and brands that we should look out for in the next 5 years?**

The legalization of cannabis in Canada is, without doubt, one of the most interesting and exciting brand building opportunities in a generation. Not only for this country, but also globally as cannabis becomes legal in other jurisdictions. The sector is in the very early stages of development (lots of growing pains right now) but, for those organizations looking to build value for the long term, these brands will become the crucial driver of that value.

At Level5 Strategy we define brand as 'the value of a promise consistently kept'. It is far beyond marcom and requires the whole organization to play its part in building the brand. This becomes more important given the restriction on traditional 'marcom' techniques.

The brand will be defined by effectively delivering the promise in terms of product/service quality, consistency, availability, safety, product extensions and openness to learn and change in a very immature customer journey. This sector is highly regulated but differentiation is possible and needed for long term value appreciation.

## **There is seemingly no traditional sector brand that is safe from tech sector disruption. What do traditional sector brands need to do to adapt and grow under these conditions?**

You are absolutely right that technology – or digital – should now be immersive in any organization's business model. It should be part of any strategic discussion and seen as an enabler to differentiation and the value proposition put forward to the market.

I think it should be embraced by an executive team at a more traditional organization. When we use the term "digital" today, the reality is the necessary changes encompass much more than simply a process of redesigning IT architectures and business operations.

Rather, companies must rethink everything that touches the customer journey — design, research, product management, marketing, support, you name it — and create experiences that likely go beyond a product's original purpose.

Organizations that we have worked with that take this approach are having success with this new competitive reality. I think the next 5 years will start to separate those who have embraced technology – are not afraid of this new competition – from those who are paralyzed by it and clearly show the winners and losers in the market.

## **What is unique about the way Canadian Tire Corp. approaches brand and brand management?**

I think there are two significant things that they have done. First, they have recognized that the traditional model of retailing – product driven – has dramatically changed to become customer driven. Customers have gained a lot of power thanks to technology.

For example, they can do instant price comparisons, quality comparisons and purchase wherever and whenever they want! Adopting to this changing business



model requires a new strategy, processes, competencies and culture. I think CTC has been working hard at this for the past several years. Second, the organization has taken the time to really understand their brand and treat it as a valuable asset – to be nurtured, leveraged and act as a driving force for profitable growth. Importantly, this brand ownership and culture must start from the top, the chief brand officer of a brand-driven company is the CEO and I believe Stephen Wetmore excels at this.

They are one of the only organizations I know that have a Brand & Community Committee at the board level. That sends a very powerful and positive message to all employees about the importance of their brand and the role they play in increasing the value of this asset.

## **What are some of the ways that traditional brick-and-mortar brands like Canadian Tire compete in the digital space?**

The first thing is to embrace the multiple channels that consumers now engage in and then ensure your operations are extremely competent in all channels. This is table stakes and seems obvious but many brick-and-mortar retailers still have a way to go in this area (CTC has made great strides over the past couple of years). Once you have accomplished this – don't be satisfied. Look for aspects within each channel that you can be the leader and innovator.

In addition, one of the most significant levers that brick-and-mortar organizations have to strengthen their value proposition is in the customer experience. This is still territory difficult for digital-only to compete in as effectively. It requires a clear strategy on the type of customer experience you want to deliver that is relevant to customers and touches the emotional and rational drivers of purchase intent along their journey.

Linking experiences across multiple channels – allowing customers to seamlessly transition from online to brick-and-mortar and back again – is what the great retailers are building. When you do this right, it can't be duplicated by your competition – digital or traditional – and YOU win!

# Brand Finance Canada 100 (CAD m.).

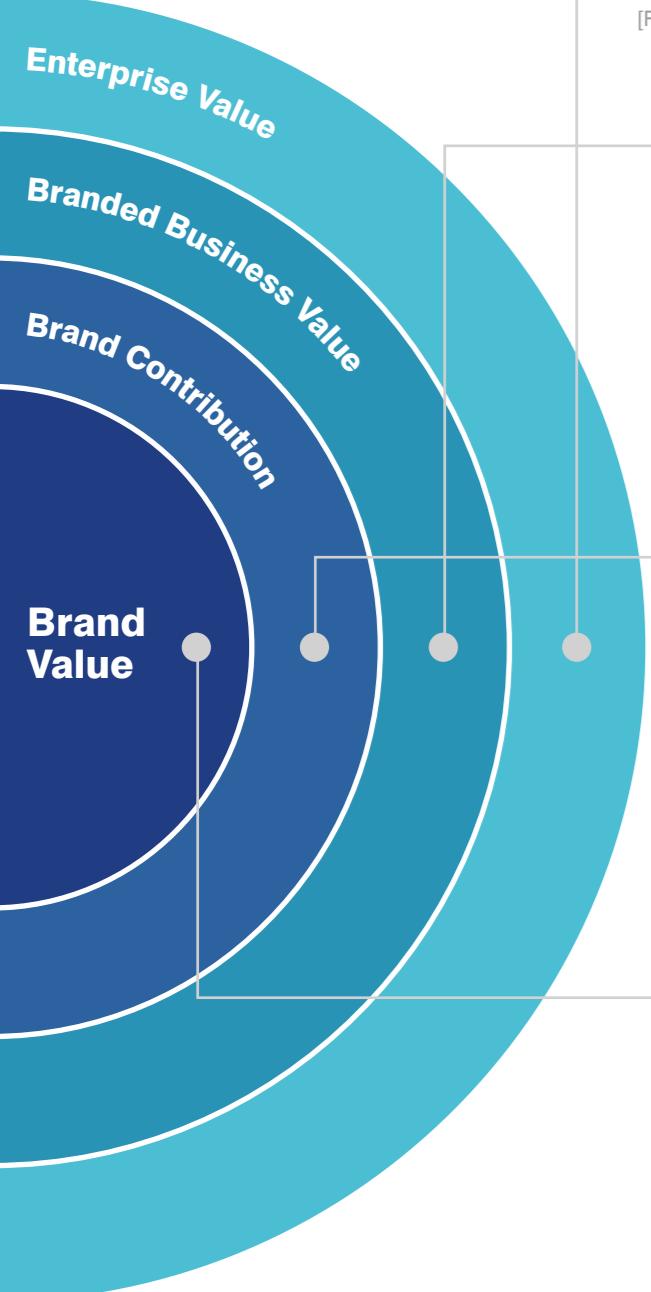
## Top 100 most valuable Canadian brands 1-50

2019 Rank	2018 Rank	Brand	Sector	2019 Brand Value	Brand Value Change	2018 Brand Value	2019 Brand Rating	2018 Brand Rating
1	1	↑ RBC	Banking	\$22,726	+31.7%	\$17,258	AAA-	AAA-
2	2	↑ TD	Banking	\$18,270	+16.9%	\$15,623	AAA-	AAA-
3	4	↑ Scotiabank	Banking	\$14,712	+15.5%	\$12,740	AAA-	AAA-
4	5	↑ BMO	Banking	\$13,234	+29.1%	\$10,249	AAA-	AA+
5	8	↑ CIBC	Banking	\$10,363	+16.9%	\$8,862	AAA-	AAA-
6	3	↓ Bell	Telecoms	\$10,332	-23.6%	\$13,518	AA+	AAA-
7	7	↑ Telus	Telecoms	\$8,966	-6.7%	\$9,612	AAA-	AAA
8	9	↑ Brookfield	Asset & Wealth Management	\$8,889	+6.0%	\$8,385	A+	A+
9	6	↓ Rogers	Telecoms	\$8,689	-11.7%	\$9,844	AAA-	AAA-
10	16	↑ Circle K	Retail	■	■	■	■	■
11	11	↑ Tim Hortons	Restaurants	■	■	■	■	■
12	15	↑ McCain	Food	■	■	■	■	■
13	14	↑ CN	Logistics	■	■	■	■	■
14	13	↓ CNRL	Oil & Gas	■	■	■	■	■
15	12	↓ Enbridge	Oil & Gas	■	■	■	■	■
16	18	↑ Desjardins	Banking	■	■	■	■	■
17	17	↑ Manulife	Insurance	■	■	■	■	■
18	21	↑ Sun Life	Insurance	■	■	■	■	■
19	10	↓ Thomson Reuters	Media	■	■	■	■	■
20	24	↑ Air Canada	Airlines	■	■	■	■	■
21	22	↑ Canadian Tire	Retail	■	■	■	■	■
22	23	↑ Magna	Auto Components	■	■	■	■	■
23	19	↓ Suncor Energy	Oil & Gas	■	■	■	■	■
24	31	↑ Bombardier	Aerospace & Defence	■	■	■	■	■
25	45	↑ Lululemon	Apparel	■	■	■	■	■
26	30	↑ CP	Logistics	■	■	■	■	■
27	35	↑ Dairyland	Food	■	■	■	■	■
28	28	↑ National Bank	Banking	■	■	■	■	■
29	20	↓ CGI	Tech	■	■	■	■	■
30	25	↓ Shaw	Telecoms	■	■	■	■	■
31	32	↑ Loblaw's	Retail	■	■	■	■	■
32	26	↓ Sobeys	Retail	■	■	■	■	■
33	33	↑ London Life	Insurance	■	■	■	■	■
34	34	↑ Petro-Canada	Oil & Gas	■	■	■	■	■
35	39	↑ Neilson	Food	■	■	■	■	■
36	27	↓ Intact	Insurance	■	■	■	■	■
37	41	↑ Shoppers Drug Mart	Retail	■	■	■	■	■
38	29	↓ Dollarama	Retail	■	■	■	■	■
39	37	↓ Husky Energy	Oil & Gas	■	■	■	■	■
40	-	New Nutrien	Chemicals	■	■	■	■	■
41	53	↑ Constellation Software	Tech	■	■	■	■	■
42	44	↑ Videotron	Telecoms	■	■	■	■	■
43	51	↑ PokerStars	Tech	■	■	■	■	■
44	43	↓ Great-West Lifeco	Insurance	■	■	■	■	■
45	46	↑ Gildan	Apparel	■	■	■	■	■
46	48	↑ Metro	Retail	■	■	■	■	■
47	42	↓ TransCanada	Oil & Gas	■	■	■	■	■
48	52	↑ Open Text	Tech	■	■	■	■	■
49	64	↑ Crown Royal	Spirits	■	■	■	■	■
50	49	↓ Real Canadian Superstore	Retail	■	■	■	■	■

## Top 100 most valuable Canadian brands 51-100

2019 Rank	2018 Rank	Brand	Sector	2019 Brand Value	Brand Value Change	2018 Brand Value	2019 Brand Rating	2018 Brand Rating
51	47	↓ Encana	Oil & Gas	■	■	■	■	■
52	38	↓ Cenovus	Oil & Gas	■	■	■	■	■
53	61	↑ Winners	Retail	■	■	■	■	■
54	58	↑ Industrial Alliance	Insurance	■	■	■	■	■
55	40	↓ Imperial Oil	Oil & Gas	■	■	■	■	■
56	63	↑ BRP	Leisure & Tourism	■	■	■	■	■
57	66	↑ Canada Goose	Apparel	■	■	■	■	■
58	56	↓ Canada Life	Insurance	■	■	■	■	■
59	54	↓ Fortis	Utilities	■	■	■	■	■
60	50	↓ BCE	Telecoms	■	■	■	■	■
61	65	↑ WestJet	Airlines	■	■	■	■	■
62	68	↑ Rona	Retail	■	■	■	■	■
63	62	↓ Ivanhoe Cambridge	Real Estate	■	■	■	■	■
64	60	↓ Cogeco	Telecoms	■	■	■	■	■
65	77	↑ Pernibna Pipeline	Oil & Gas	■	■	■	■	■
66	-	New Couche-Tard	Retail	■	■	■	■	■
67	75	↑ LoyaltyOne	Commercial Services	■	■	■	■	■
68	71	↑ Waste connections	Utilities	■	■	■	■	■
69	83	↑ First Quantum	Mining, Iron & Steel	■	■	■	■	■
70	67	↓ Investors Group	Asset & Wealth Management	■	■	■	■	■
71	78	↑ Hydro One	Utilities	■	■	■	■	■
72	73	↑ SNC-Lavalin	Engineering & Construction	■	■	■	■	■
73	69	↓ Jean Coutu	Retail	■	■	■	■	■
74	74	↑ Fanning	Engineering & Construction	■	■	■	■	■
75	70	↓ Cineplex	Media	■	■	■	■	■
76	98	↑ Parkland Fuel	Oil & Gas	■	■	■	■	■
77	76	↓ OdysseyRe	Insurance	■	■	■	■	■
78	72	↓ Leon's Furniture	Retail	■	■	■	■	■
79	79	↑ Saputo	Food	■	■	■	■	■
80	-	New WSP Global	Engineering & Construction	■	■	■	■	■
81	85	↑ Super C	Retail	■	■	■	■	■
82	-	New Emera	Utilities	■	■	■	■	■
83	86	↑ CAE	Aerospace & Defence	■	■	■	■	■
84	82	↓ Wholesale Club	Retail	■	■	■	■	■
85	-	New New Flyer	Auto	■	■	■	■	■
86	88	↑ Seven Generations Energy	Oil & Gas	■	■	■	■	■
87	-	New A&W	Restaurants	■	■	■	■	■
88	-	New Sealtest	Food	■	■	■	■	■
89	84	↓ CI Financial	Banking	■	■	■	■	■
90	80	↓ Teck	Mining, Iron & Steel	■	■	■	■	■
91	-	New Quebec	Food	■	■	■	■	■
92	-	New Colliers	Real Estate	■	■	■	■	■
93	87	↓ Food Basics	Retail	■	■	■	■	■
94	-	New Transcontinental	Commercial Services	■	■	■	■	■
95	-	New Gibson Energy	Oil & Gas	■	■	■	■	■
96	-	New Seagram's	Spirits	■	■	■	■	■
97	90	↓ Barrick Gold	Mining, Iron & Steel	■	■	■	■	■
98	99	↑ Choice Properties	Real Estate	■	■	■	■	■
99	92	↓ Brit	Insurance	■	■	■	■	■
100	-	New Enerplus Corp	Oil & Gas	■	■	■	■	■

# Definitions.



## Brand Value



[Restaurant Brands International]

### + Enterprise Value

**The value of the entire enterprise, made up of multiple branded businesses.**

Where a company has a purely mono-branded architecture, the 'enterprise value' is the same as 'branded business value'.

### + Branded Business Value

**The value of a single branded business operating under the subject brand.**

A brand should be viewed in the context of the business in which it operates. Brand Finance always conducts a branded business valuation as part of any brand valuation. We evaluate the full brand value chain in order to understand the links between marketing investment, brand-tracking data, and stakeholder behaviour.

### + Brand Contribution

**The overall uplift in shareholder value that the business derives from owning the brand rather than operating a generic brand.**

The brand values contained in our league tables are those of the potentially transferable brand assets only, making 'brand contribution' a wider concept. An assessment of overall 'brand contribution' to a business provides additional insights to help optimise performance.

### + Brand Value

**The value of the trade mark and associated marketing IP within the branded business.**

Brand Finance helped to craft the internationally recognised standard on Brand Valuation – ISO 10668. It defines brand as a marketing-related intangible asset including, but not limited to, names, terms, signs, symbols, logos, and designs, intended to identify goods, services or entities, creating distinctive images and associations in the minds of stakeholders, thereby generating economic benefits.

## Brand Strength

**Brand Strength is the efficacy of a brand's performance on intangible measures, relative to its competitors.**

In order to determine the strength of a brand, we look at Marketing Investment, Stakeholder Equity, and the impact of those on Business Performance.

### Brand Strength Index



Widely recognised factors deployed by marketers to create brand loyalty and market share.

Perceptions of the brand among different stakeholder groups, with customers being the most important.

Quantitative market and financial measures representing the success of the brand in achieving price and volume premium.

### Marketing Investment

- A brand that has high Marketing Investment but low Stakeholder Equity may be on a path to growth. This high investment is likely to lead to future performance in Stakeholder Equity which would in turn lead to better Business Performance in the future.
- However, high Marketing Investment over an extended period with little improvement in Stakeholder Equity would imply that the brand is unable to shape customers' preference.

### Stakeholder Equity

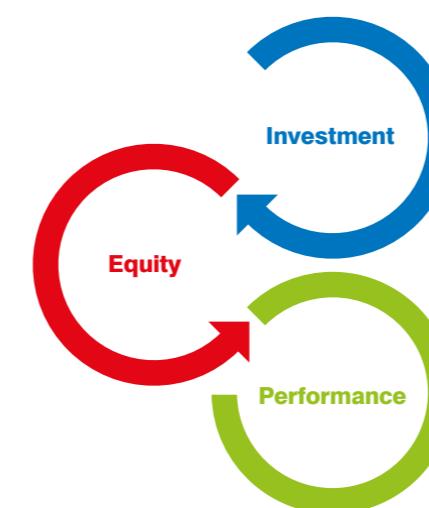
- The same is true for Stakeholder Equity. If a company has high Stakeholder Equity, it is likely that Business Performance will improve in the future.
- However, if the brand's poor Business Performance persists, it would suggest that the brand is inefficient compared to its competitors in transferring stakeholder sentiment to a volume or price premium.

### Business Performance

- Finally, if a brand has a strong Business Performance but scores poorly on Stakeholder Equity, it would imply that, in the future, the brand's ability to drive value will diminish.
- However, if it is able to sustain these higher outputs, it shows that the brand is particularly efficient at creating value from sentiment compared to its competitors.

Each brand is assigned a Brand Strength Index (BSI) score out of 100, which feeds into the brand value calculation. Based on the score, each brand is assigned a corresponding rating up to AAA+ in a format similar to a credit rating.

Analysing the three brand strength measures helps inform managers of a brand's potential for future success.



# Brand Valuation Methodology.

Brand Finance calculates the values of the brands in its league tables using the Royalty Relief approach – a brand valuation method compliant with the industry standards set in ISO 10668.

This involves estimating the likely future revenues that are attributable to a brand by calculating a royalty rate that would be charged for its use, to arrive at a ‘brand value’ understood as a net economic benefit that a licensor would achieve by licensing the brand in the open market.

## The steps in this process are as follows:

- 1 Calculate brand strength using a balanced scorecard of metrics assessing Marketing Investment, Stakeholder Equity, and Business Performance. Brand strength is expressed as a Brand Strength Index (BSI) score on a scale of 0 to 100.
- 2 Determine royalty range for each industry, reflecting the importance of brand to purchasing decisions. In luxury, the maximum percentage is high, in extractive industry, where goods are often commoditised, it is lower. This is done by reviewing comparable licensing agreements sourced from Brand Finance's extensive database.
- 3 Calculate royalty rate. The BSI score is applied to the royalty range to arrive at a royalty rate. For example, if the royalty range in a sector is 0-5% and a brand has a BSI score of 80 out of 100, then an appropriate royalty rate for the use of this brand in the given sector will be 4%.
- 4 Determine brand-specific revenues by estimating a proportion of parent company revenues attributable to a brand.
- 5 Determine forecast revenues using a function of historic revenues, equity analyst forecasts, and economic growth rates.
- 6 Apply the royalty rate to the forecast revenues to derive brand revenues.
- 7 Brand revenues are discounted post-tax to a net present value which equals the brand value.



# Market Research Methodology.

Brand Finance conducted original market research in 10 sectors across 31 markets with a sample size of over 50,000 adults, representative of each country's internet population aged 18+. Surveys were conducted online during Autumn 2018.



# Stakeholder Equity Measures.

## Key Metrics

- |              |                  |
|--------------|------------------|
| + Reputation | + Emotional Fit  |
| + Innovation | + Recommendation |
| + Trust      | + Quality etc.   |

## Brand conversion funnel

The brand conversion funnel is a way of summarising the likely strength of a brand to convert to purchase.



### Awareness

Knowledge that your brand exists

### Familiarity

Depth of knowledge of the brand

### Consideration

Narrowing down market to candidate brand set

### Preference

Category users' brand preference

### Loyalty

Intention to repeat purchase

## Disclaimer

Brand Finance has produced this study with an independent and unbiased analysis. The values derived and opinions produced in this study are based only on publicly available information and certain assumptions that Brand Finance used where such data was deficient or unclear. Brand Finance accepts no responsibility and will not be liable in the event that the publicly available information relied upon is subsequently found to be inaccurate. The opinions and financial analysis expressed in the report are not to be construed as providing investment or business advice. Brand Finance does not intend the report to be relied upon for any reason and excludes all liability to any body, government or organisation.

# Consulting Services.

## 1. Valuation: What are my intangible assets worth?

Valuations may be conducted for technical purposes and to set a baseline against which potential strategic brand scenarios can be evaluated.

- + Branded Business Valuation
- + Trademark Valuation
- + Intangible Asset Valuation
- + Brand Contribution

## 4. Transactions: Is it a good deal? Can I leverage my intangible assets?

Transaction services help buyers, sellers, and owners of branded businesses get a better deal by leveraging the value of their intangibles.

- + M&A Due Diligence
- + Franchising & Licensing
- + Tax & Transfer Pricing
- + Expert Witness



## 2. Analytics: How can I improve marketing effectiveness?

Analytical services help to uncover drivers of demand and insights. Identifying the factors which drive consumer behaviour allows an understanding of how brands create bottom-line impact.

- Market Research Analytics
- + Return on Marketing Investment
- + Brand Audits
- + Brand Scorecard Tracking

## 3. Strategy: How can I increase the value of my branded business?

Strategic marketing services enable brands to be leveraged to grow businesses. Scenario modelling will identify the best opportunities, ensuring resources are allocated to those activities which have the most impact on brand and business value.

- Brand Governance
- + Brand Architecture & Portfolio Management
- + Brand Transition
- + Brand Positioning & Extension



### MARKETING



### FINANCE



### TAX



### LEGAL

We help marketers to connect their brands to business performance by evaluating the return on investment (ROI) of brand-based decisions and strategies.

We provide financers and auditors with an independent assessment on all forms of brand and intangible asset valuations.

We help brand owners and fiscal authorities to understand the implications of different tax, transfer pricing, and brand ownership arrangements.

We help clients to enforce and exploit their intellectual property rights by providing independent expert advice in- and outside of the courtroom.

# Brand Evaluation Services.

## How are brands perceived in my category?

Brand Finance tracks brand fame and perceptions across over 30 markets in 10 consumer categories. 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 30-country database of brand KPIs enables us to benchmark performance appropriately.

## Do I have the right brand architecture or strategy in place?

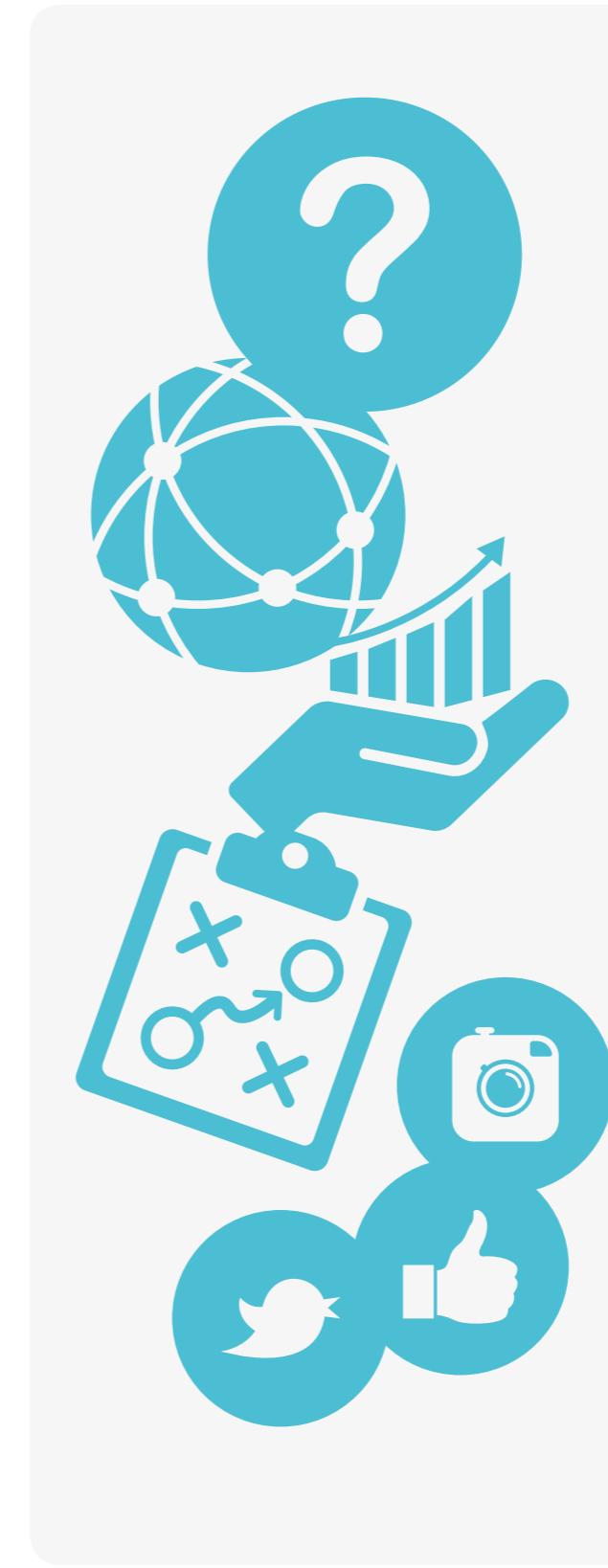
Research is conducted in addition to strategic analysis to provide a robust understanding of the current positioning. The effectiveness of alternative architectures is tested through drivers analysis, to determine which option(s) will stimulate the most favourable customer behaviour and financial results.

## 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.



# Communications Services.

## How we can help communicate your brand's performance in brand value rankings



**Brand Accolade** – create a digital endorsement stamp for use in marketing materials, communications, annual reports, social media and website. Advertising use subject to terms and conditions.



TOP 100  
CANADIAN  
BRAND



MOST VALUABLE  
CANADIAN  
BRAND



STRONGEST  
CANADIAN  
BRAND



**Video Endorsement** – record video with Brand Finance CEO or Director speaking about the performance of your brand, for use in both internal and external communications.



**Bespoke Events** – organise an award ceremony or celebratory event, coordinate event opportunities and spearhead communications to make the most of them.



**Digital Infographics** – design infographics visualising your brand's performance for use across social media platforms.



**Trophies & Certificates** – provide a trophy and/or hand-written certificate personally signed by Brand Finance CEO to recognise your brand's performance.



**Sponsored Content** – publish contributed articles, advertorials, and interviews with your brand leader in the relevant Brand Finance report offered to the press.



**Media Support** – provide editorial support in reviewing or copywriting your press release, pitching your content to top journalists, and monitoring media coverage.

## Brand Dialogue®



### Value-Based Communications

With strategic planning and creative thinking, we develop communications plans to create dialogue with stakeholders that drives brand value. Our approach is integrated, employing tailored solutions for our clients across PR, marketing and social media.

#### SERVICES

- Research and Insights
- Integrated Communications Planning
- Project Management and Campaign Execution
- Content and Channel Strategy
- Communications Workshops

For more information, contact [enquiries@brand-dialogue.co.uk](mailto:enquiries@brand-dialogue.co.uk) or visit [www.brand-dialogue.co.uk](http://www.brand-dialogue.co.uk)

Brand Dialogue is a member of the Brand Finance plc group of companies



## BRAND EXCHANGE®

WHERE BRANDS MEET FINANCE

### BECOME A MEMBER TODAY

A CONTEMPORARY AND EXCLUSIVE  
MEMBERS' CLUB  
IN THE HEART OF THE CITY OF LONDON

CHARACTERFUL SPACE  
for  
**MEETINGS**  
&  
**PRIVATE EVENTS**

MEMBERS' EVENTS  
with  
FOCUS ON MARKETING  
&  
**BRANDING**

DISCOUNTED  
ROOM HIRE  
for  
**MEMBERS**

3 Birch Lane, London, EC3V 9B +44 (0)207 389 9410 [enquiries@brandexchange.com](mailto:enquiries@brandexchange.com)

Brand Exchange is a member of the Brand Finance plc group of companies

# Brand Finance Network.

For further information on our services and valuation experience, please contact your local representative:

Market	Contact	Email	Telephone
Asia Pacific	Samir Dixit	s.dixit@brandfinance.com	+65 906 98 651
Australia	Mark Crowe	m.crowe@brandfinance.com	+61 282 498 320
Canada	Charles Scarlett-Smith	c.scarlett-smith@brandfinance.com	+1 514 991 5101
Caribbean	Nigel Cooper	n.cooper@brandfinance.com	+1 876 825 6598
China	Scott Chen	s.chen@brandfinance.com	+86 186 0118 8821
East Africa	Jawad Jaffer	j.jaffer@brandfinance.com	+254 204 440 053
France	Bertrand Chovet	b.chovet@brandfinance.com	+33 6 86 63 46 44
Germany	Holger Muehlbauer	h.muehlbauer@brandfinance.com	+49 151 54 749 834
India	Savio D'Souza	s.dsouza@brandfinance.com	+44 207 389 9400
Indonesia	Jimmy Halim	j.halim@brandfinance.com	+62 215 3678 064
Ireland	Simon Haigh	s.haigh@brandfinance.com	+353 087 669 5881
Italy	Massimo Pizzo	m.pizzo@brandfinance.com	+39 02 303 125 105
Japan	Jun Tanaka	j.tanaka@brandfinance.com	+81 90 7116 1881
Mexico & LatAm	Laurence Newell	l.newell@brandfinance.com	+52 1559 197 1925
Middle East	Andrew Campbell	a.campbell@brandfinance.com	+971 508 113 341
Nigeria	Tunde Odumeru	t.odumeru@brandfinance.com	+234 012 911 988
Romania	Mihai Bogdan	m.bogdan@brandfinance.com	+40 728 702 705
South Africa	Jeremy Sampson	j.sampson@brandfinance.com	+27 82 885 7300
Spain	Teresa de Lemus	t.delemus@brandfinance.com	+34 654 481 043
Sri Lanka	Ruchi Gunewardene	r.gunewardene@brandfinance.com	+94 114 941670
Turkey	Muhterem Ilgüner	m.ilguner@brandfinance.com	+90 216 352 67 29
UK	Richard Haigh	rd.haigh@brandfinance.com	+44 207 389 9400
USA	Laurence Newell	l.newell@brandfinance.com	+1 917 794 3249
Vietnam	Lai Tien Manh	m.lai@brandfinance.com	+84 90 259 82 28

T: +44 (0)20 7389 9400

E: [enquiries@brandfinance.com](mailto:enquiries@brandfinance.com)

[www.brandfinance.com](http://www.brandfinance.com)

