



# UAE 25 2020

**The annual report on the most valuable and strongest UAE brands**  
April 2020

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# About Brand Finance.

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

**We bridge the gap between marketing and finance**

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 quantify the financial value of brands**

We put 5,000 of the world's biggest brands to the test every year. Ranking brands across all sectors and countries, we publish nearly 100 reports annually.

**We offer a unique combination of expertise**

Our teams have experience across a wide range of disciplines from marketing and market research, to brand strategy and visual identity, to tax and accounting.

**We pride ourselves on technical credibility**

Brand Finance is a chartered accountancy firm regulated by the Institute of Chartered Accountants in England and Wales, and the first brand valuation consultancy to join the International Valuation Standards Council.

Our experts helped craft the internationally recognised standards on Brand Valuation – ISO 10668 and Brand Evaluation – ISO 20671. Our methodology has been certified by global independent auditors – Austrian Standards – as compliant with both, and received the official approval of the Marketing Accountability Standards Board.



# Get in Touch.

**For media enquiries, please contact:**

**Sehr Sarwar**  
Communications Director  
+44 79366 963 669  
s.sarwar@brandfinance.com

**For business enquiries, please contact:**

**Richard Haigh**  
Managing Director  
rd.haigh@brandfinance.com

**For all other enquiries, please contact:**

enquiries@brandfinance.com  
+44 207 389 9400

**For more information, please visit our website:**  
www.brandfinance.com

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

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

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Brand Finance®



# Request your own 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 gaining a better understanding of your position against competitors.



Benchmarking



Education



Royalty Rates



Cost of Capital Analysis



Communication



Understanding



Customer Research Findings



Competitor Benchmarking

What's in a Brand Value Report?

Benefits of a Brand Value Report



Brand Valuation Summary



Brand Strength Tracking

# Brandirectory.com



Brandirectory is the world's largest database of current and historical brand values, providing easy access to all Brand Finance rankings, reports, whitepapers, and consumer research published since 2007.

- + Browse thousands of published brand values
- + Track brand value, strength, and rating across publications and over time
- + Use interactive charts to compare brand values across countries, sectors, and global rankings
- + Purchase and instantly unlock premium data, complete brand rankings, and research

Visit [brandirectory.com](http://brandirectory.com) to find out more.

## Brand Finance Group.

**Brand Dialogue**



### Brand Dialogue

Brand Dialogue is a public relations agency developing communications strategies to create dialogue that drives brand value. Brand Dialogue has over 25 years of experience in delivering campaigns driven by research, measurement, and strategic thinking for a variety of clients, with a strong background in geographic branding, including supporting nation brands and brands with a geographical indication (GI). Brand Dialogue manages communications activities across Brand Finance Group's companies and network.

**BRAND EXCHANGE**  
WHERE BRANDS MEET FINANCE



### Brand Exchange

Brand Exchange is a contemporary and exclusive members' club and events space nestled in the heart of the City of London. It was launched in 2015 to provide members with a private space to network and socialise. The club has since held several prestigious events and welcomed many key figures in the marketing and finance sectors as speakers. The membership brings together senior professionals from the world's strongest and most valuable brands.

**vi360**

### VI360

VI360 is a brand identity management consultancy working for clients of all sizes on brand compliance, brand transition, and brand identity management. VI360 provide straightforward and practical brand management that results in tangible benefits for your business.

Brand Finance®



# Customer insight drives our valuations

Our brand valuations are underpinned by extensive market research across a wide range of sectors, countries and brands.

Our research integrates all key brand measures, linking them to commercial outcomes.

Available for purchase separately or as part of a Brand Value Report.

- Over **1,500 brands** researched each year
- 29 countries** and **10 sectors** covered
- More than **50,000 respondents** surveyed annually
- Key metrics** across all industries and brands
- B2B** and **B2C** results
- We are now **in our 4<sup>th</sup> consecutive year** conducting the study



# 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.

# Inaugural Report on UAE's 25 Most Valuable Brands Ranks ADNOC, Etisalat, Emirates in Top Spots, However Companies Worldwide Must Brace Themselves for up to US\$1tn Loss in Brand Value as Direct Impact of COVID-19 Outbreak.

- + **ADNOC** growing 29% since last year, brand value US\$11.4 billion is UAE's most valuable brand
- + **Etisalat's** AAA Brand Rating and digital technologies provide strong resilience to help weather COVID-19 storm
- + In new analysis, Brand Finance measured levels of business impact from Coronavirus categorised by limited impact, moderate and worst hit
- + **ADCB** is UAE's fastest growing brand, up 41% to US\$2.7 billion
- + Worst hit industries under COVID-19: aviation, oil & gas, tourism & leisure, restaurants, retail

# Executive Summary.



The world's biggest companies are set to lose up to US\$1tn in brand value as a result of the Coronavirus outbreak, with the aviation sector being the most affected.

Brand Finance has assessed the impact of the COVID-19 outbreak based on the effect of the outbreak on enterprise value, as at 18<sup>th</sup> March 2020, compared to what it was on 1<sup>st</sup> January 2020. Based on this impact on enterprise value, Brand Finance estimated the likely impact on brand value for each sector. Each sector has been classified into 3 categories based on the severity of enterprise value loss observed for the sector in the period between 1<sup>st</sup> January 2020 and 18<sup>th</sup> March 2020.

## UAE's top 25 brands

Brand Finance today released the first UAE 25 report on the UAE's top 25 most valuable and strongest brands, of which 7 are banking brands. Following last year's three-way merger between Union National Bank and Al Hilal Bank, **ADCB** is the fastest growing brand in the UAE, up 41% since last year to US\$2.7 billion.

A regional ranking of the Middle East's top 50 most valuable brands has also been launched today by Brand Finance. The Middle East 50 2020 features 17 UAE brands representing a variety of sectors spanning oil and gas, telecoms, airlines, banks, and chemicals – a testament to the UAE's standing as a competitive global player.

## ADNOC breaks US\$11 billion barrier

**Abu Dhabi National Oil Company (ADNOC)** is the UAE's most valuable brand, up 29% to US\$11.4 billion.

**The COVID-19 pandemic and its impact on global markets is very real. Worldwide, brands across every sector are braced for the Coronavirus to massively affect their business activities, supply chain and revenues in a way that eclipses the 2003 SARS outbreak.**

**Now is the ideal moment for the UAE's home-grown brands to remain ever present in their stakeholders' minds, engage across digital channels, show resilience and adaptability in these unprecedented times.**

**David Haigh,**  
CEO, Brand Finance

The brand is also the first UAE brand to achieve a brand valuation of more than US\$11 billion, a testament to the success of the Group's ongoing transformation strategy. Since 1971, ADNOC has created thousands of jobs, driven the growth of a diverse knowledge-based economy, and played a key role in Abu Dhabi's global emergence. ADNOC continues to look for new and innovative ways to maximise the value of its resources, pioneering those approaches and technologies that will ensure it is able to meet the demands of an ever-changing energy market, especially now amidst the steep slide in oil prices.

## Etisalat maintains AAA brand rating and most valuable consumer brand

Emirati telecoms giant **Etisalat** is the most valuable consumer brand in the Middle East 50 2020 and UAE 25 2020 rankings for the third year in a row. With a brand value of US\$8.5 billion, Etisalat has demonstrated a consistent performance over the years. The brand is also the strongest telecoms brand in the Middle East and Africa – making it the sole brand in the region to maintain the prestigious AAA Brand Rating.

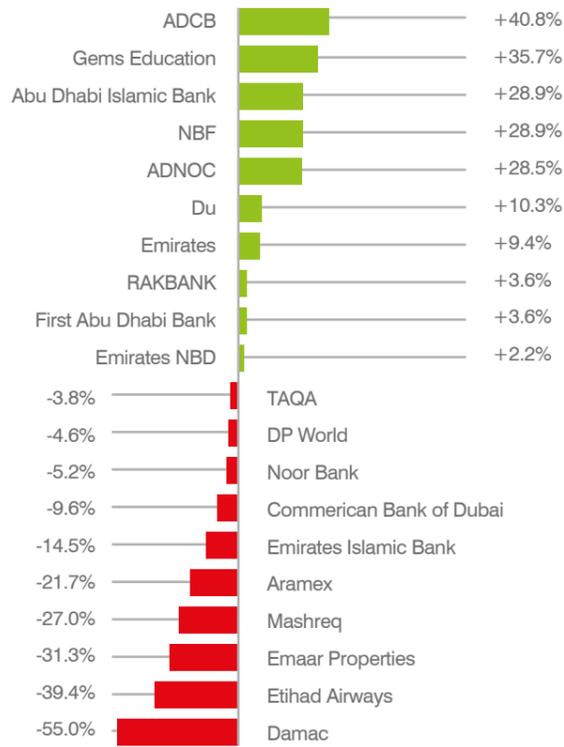
The brand's growing role in fulfilling the UAE's National Innovation Strategy and its dominant influence in shaping the region's digital future are behind its continued success.



## Top 10 Most Valuable Brands

	<b>1</b>		2020: <b>\$11,392m</b> 2019: <b>\$8,865m</b>	<b>+28.5%</b>
	<b>2</b>		2020: <b>\$8,473m</b> 2019: <b>\$8,304m</b>	<b>+2.0%</b>
	<b>3</b>		2020: <b>\$6,860m</b> 2019: <b>\$6,268m</b>	<b>+9.4%</b>
	<b>4</b>		2020: <b>\$4,130m</b> 2019: <b>\$4,040m</b>	<b>+2.2%</b>
	<b>5</b>		2020: <b>\$4,028m</b> 2019: <b>\$3,890m</b>	<b>+3.6%</b>
	<b>6</b>		2020: <b>\$2,767m</b> 2019: <b>\$2,509m</b>	<b>+10.3%</b>
	<b>7</b>		2020: <b>\$2,667m</b> 2019: <b>\$1,894m</b>	<b>+40.8%</b>
	<b>8</b>		2020: <b>\$1,875m</b> 2019: <b>\$2,727m</b>	<b>-31.3%</b>
	<b>9</b>		2020: <b>\$1,819m</b> 2019: <b>\$1,785m</b>	<b>+1.9%</b>
	<b>10</b>		2020: <b>\$954m</b> 2019: <b>\$740m</b>	<b>+28.9%</b>

**Brand Value Change 2019-2020 (%)**



Etisalat's footprint in 16 countries across Asia, Middle East, and Africa makes it home to an impressive portfolio of brands including Mobily, Ufone, Maroc Telecom, PTCL, and Etisalat Misr with a combined portfolio brand value of US\$11.0 billion.

**Aviation worst impacted by Coronavirus**

Assessed by Brand Finance as the hardest hit sector under COVID-19 are airlines, leisure and tourism, aviation, aerospace and defence. The global airline industry has said most carriers will run out of money within two months as a result of the closure of borders for arrivals as governments order shutdowns to contain the coronavirus outbreak. A large number of major airlines, including **Emirates** (up 9% to US\$6.8 billion at 1<sup>st</sup> January 2020) and **Etihad** (down 38% to US\$0.8 billion) have grounded most of their fleets as they now confront a crisis unlike anything ever seen before in the airline industry.

In addition to measuring overall brand value, Brand Finance also evaluates the relative strength of brands, based on factors such as marketing investment, familiarity, loyalty, staff satisfaction, and corporate reputation. Alongside revenue forecasts, brand strength is a crucial driver of brand value.

According to these criteria, Emirates is the Middle East's strongest brand with a Brand Strength Index (BSI) score of 86.2 out of 100 and it is this brand strength and positive sentiment amongst passengers which will help support the airline, as it significantly reduces passenger flights across the network in response to the Coronavirus pandemic.

**Aldar & Gems Education: UAE brands to watch**

Abu-Dhabi headquartered real estate brand **Aldar** (US\$409 million) is a notable entrant to this year's ranking and tipped as a brand to monitor in the coming years. As the brand focuses its development strategy on key locations such as Yas Island and Saadiyat Island, it is also set to play a pivotal role in the Saadiyat Cultural District, which will be a focal part of Abu Dhabi's pre-eminent regional business hub and a high-end cultural destination.

In the inaugural UAE 25 report, a fast-growing brand rising through the ranks, up 36% since last year to a brand value of US\$713 million is Gems Education. The brand operates over 45 schools across the UAE and is highly regarded for its commitment to e-learning and promoting digitalisation of the classroom environment. As schools across the UAE have shut their doors to help contain the spread of COVID-19, Gems Education has swiftly relocated to online offerings and is commended as a pioneering brand in the UAE.

**Top 10 Strongest Brands**

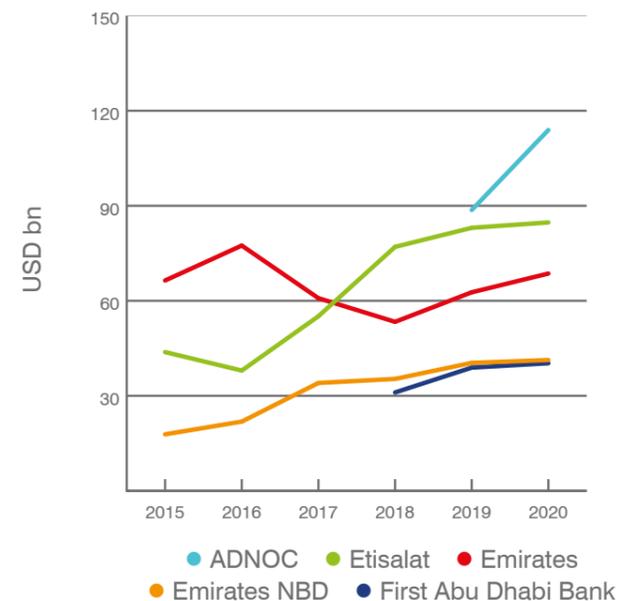
Rank	Brand	2020 Brand Value (USD bn)	2019 Brand Value (USD bn)	2020 Rating	2019 Rating	Change
1	Emirates	86.2	85.8	AAA	AAA	+0.5
2	etisalat	86.0	84.6	AAA	AAA	+1.4
3	du	79.8	78.5	AAA-	AA+	+1.4
4	Emirates NBD	79.5	80.4	AA+	AAA-	-0.9
5	ADNOC	76.0	74.4	AA+	AA	+1.6
6	GEMS EDUCATION	74.0	74.8	AA	AA+	-0.8
7	Borouge	72.4	-	AA	-	-
8	Dubai Islamic Bank	71.4	73.1	AA	AA	-1.7
9	DP WORLD	71.3	69.9	AA	AA	+1.4
10	ADCB	71.2	74.4	AA	AA	-3.3

**Brand Value by Sector**



Sector	Brand Value (USD bn)	% of total	Number of Brands
Banks	15.9	30.6%	11
Oil & Gas	11.4	21.9%	1
Telecoms	11.2	21.6%	2
Airlines	7.1	13.6%	2
Real Estate Services	2.4	4.7%	3
Logistics	1.2	2.3%	2
Other	2.8	5.3%	4
<b>Total</b>	<b>7055.2</b>	<b>100.0%</b>	<b>25</b>

**Brand Value over Time**



# COVID-19 Global Impact Analysis.

## Brand Value at Risk



## Up to \$1tn estimated loss from COVID-19

The brand value of the world's biggest companies is set to lose an estimated €936bn as a result of the Coronavirus outbreak, with the aviation sector being the most affected. The 2003 SARS outbreak, which infected about 8,000 people and killed 774, cost the global economy an estimated US\$50 billion. As of 16<sup>th</sup> March 2020, there have been 164,837 cases and 6470 deaths of COVID-19 confirmed worldwide. Global spread has been rapid, with 146 countries now having reported at least one case.

Brand Finance has assessed the impact of the COVID-19 outbreak based on the effect of the outbreak on Enterprise Value, as at 18<sup>th</sup> March 2020, compared to what it was on 1<sup>st</sup> January 2020. Based on this impact on Business Value, Brand Finance estimated the likely impact on Brand Value for each sector. Each sector has been classified into 3 categories based on the severity of Business Value loss observed for the sector in the period between 1st Jan 2020 and 18<sup>th</sup> March 2020.

**The COVID-19 pandemic is now a major global health threat and its impact on global markets is very real. Worldwide, brands across every sector need to brace themselves for the Coronavirus to massively affect their business activities, supply chain and revenues in a way that eclipses the 2003 SARS outbreak. The effects will be felt well into 2021.**

**However it is not all doom and gloom. Some brands will fare better under COVID-19: Amazon, Netflix, WhatsApp, Skype, BBC and BUPA are all booming.**

**David Haigh,**  
CEO, Brand Finance

## Work from home revolution

Brands offering in-home or remote working solutions have observed an immediate uptick in demand, as multiple **Zoom** online video conferencing platform prompted huge demand for workable solutions

Food delivery apps **Deliveroo** and **UberEats**, now offering contact-free delivery options whereby a food delivery is conveniently left on your doorstep so as not to encourage contact between customer and delivery driver, have also seen a huge surge in demand for their services.

## Media and film industry feel effects

Film production and promotion schedules have been affected by the outbreak, with **Disney** pushing back the release of its remake of *Mulan* as well as *The New Mutants*, part of the *X-Men* franchise. The effects of social distancing have meant more viewers watching TV, however **Netflix** has had to suspend production on all scripted series and films in the US and Canada. As massive televised sports events and festivals such as Glastonbury being cancelled, TV executives will be feeling the strain of providing fresh and watchable content.

**The harsh reality is that many UAE brands may not make their 2020 targets due to the unprecedented challenges of the Coronavirus outbreak.**

**Having a strong brand is now more crucial than ever, as it is this resilience which will truly help to weather the storm and bounce back from this crisis.**

**David Haigh,**  
CEO, Brand Finance



# Sector Reputation Analysis.

## Benchmarking against the very best

Every brand owner will want to compare brand equity against immediate competitors and peers. But broader benchmarking against brands across a range of categories provides a more rounded assessment of brand strength.

This perspective is also important as brand categories converge, with new technologies enabling disruption and brands seeking tactical entry into neighbouring categories, like a trusted supermarket offering financial services.

Brand reputation is relatively straightforward to compare across sectors. This year's global and UAE sector rankings from our B2C research are similar to the previous wave.

## Reputation overall just below average

Reputation scores in UAE are below average as compared to the global scores across all sectors.

## Sectors Ranked by Reputation

	<b>1</b> <b>Airlines</b>	<b>6.5</b> <sub>/10</sub>
	<b>2</b> <b>Telecoms</b>	<b>6.3</b> <sub>/10</sub>
	<b>3=</b> <b>Banks</b>	<b>6.1</b> <sub>/10</sub>
	<b>4=</b> <b>Insurance</b>	<b>6.0</b> <sub>/10</sub>

## Top Sectors per Metric

Metric	Top Sector
Reputation	 AIRLINES
Quality	 AIRLINES
Recommendation (NPS)	 AIRLINES
Loyalty	 AIRLINES
Innovation	 TELECOMS
Website/App	 AIRLINES
OVERALL STAKEHOLDER EQUITY	 AIRLINES

Categories where a poor reputation is the default position, such as telecoms and banks, still have somewhat mixed reputations overall, but are perhaps beginning to repair confidence somewhat. There is still a long way to go - and the sector average scores reflect overall feelings towards brands: acceptance and appreciation, but rarely love and devotion.

## Airline brands deliver quality

Middle-Eastern airline brands are highly regarded both in the region and globally, and this helps the sector to achieve top ranking for almost all the metrics, such as reputation, quality, loyalty, recommendation and websites. **Emirates** (7.8 out of 10) and **Etihad Airways** (7.2 out of 10) had the highest reputation scores amongst airlines in Saudi Arabia.

The premium carriers are also seen as offering good value for money, and again the airline sector tops this ranking. 'You get what you pay for' appears to be the underlying consumer sentiment.

## Banks lag behind

Banking brands continue to struggle to earn the respect of consumers. In banking, reputation is poor - banks are generally not seen as trustworthy, and rank last for quality and loyalty.

**Emirates NBD** (7.0) stands out from the crowd and is an exception to the rest of the banks. But with brands such as **Apple** and **PayPal** enjoying significantly higher scores for reputation and innovation, even the strongest banking and telecom brands need to address the threat from tech brands increasingly encroaching on their territories.

## Telecoms jostle for leadership

Reputation scores for telecoms providers are closing the gap to those of airlines. **Etisalat** (7.1) is a major local brand that scores particularly high in this sector. They also do particularly well for loyalty, word of mouth and value for money, suggesting that consumers generally have a good impression of their insurance brands.



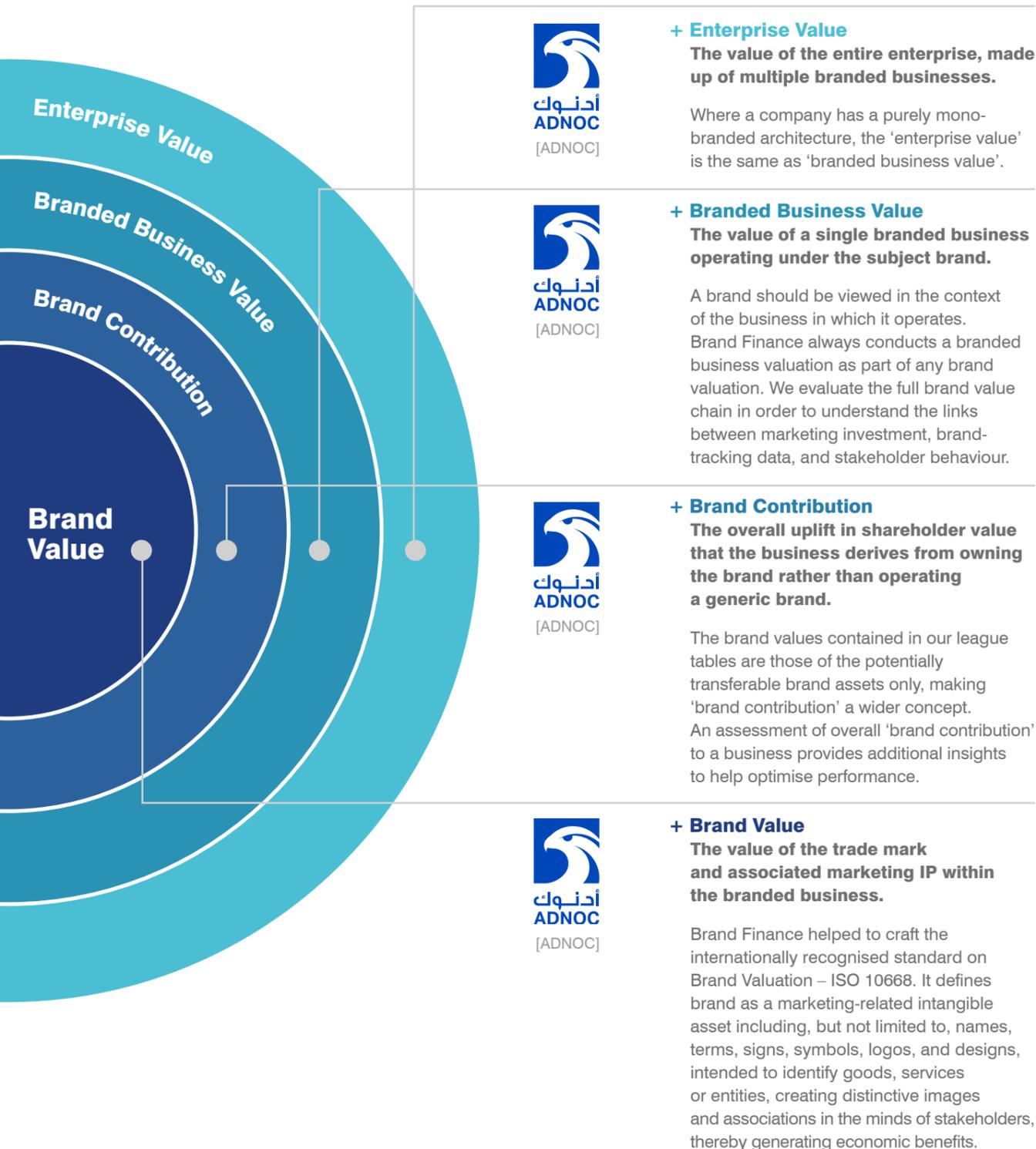
# Brand Finance UAE 25 (USD m).

## Top 25 most valuable UAE brands 1-25

2020 Rank	Brand	Sector	2020 Brand Valuation	Brand Value Change	2019 Brand Value	2020 Brand Rating	2019 Brand Rating
1	ADNOC	Oil & Gas	\$11,392	+28.5%	\$8,865	AA+	AA
2	Etisalat	Telecoms	\$8,473	+2.0%	\$8,304	AAA	AAA
3	Emirates	Airlines	\$6,860	+9.4%	\$6,268	AAA	AAA
4	Emirates NBD	Banks	\$4,130	+2.2%	\$4,040	AA+	AAA-
5	First Abu Dhabi Bank	Banks	\$4,028	+3.6%	\$3,890	AA-	AA
6	Du	Telecoms	\$2,767	+10.3%	\$2,509	AAA-	AA+
7	ADCB	Banks	\$2,667	+40.8%	\$1,894	AA	AA
8	Emaar Properties	Real Estate Services	\$1,875	-31.3%	\$2,727	A+	A+
9	Dubai Islamic Bank	Banks	\$1,819	+1.9%	\$1,785	AA	AA
10	Abu Dhabi Islamic Bank	Banks	\$954	+28.9%	\$740	AA-	AA-
11	DP World	Logistics	🔒	🔒	🔒	🔒	🔒
12	Etihad Airways	Airlines	🔒	🔒	🔒	🔒	🔒
13	TAQA	Utilities	🔒	🔒	🔒	🔒	🔒
14	Gems Education	Commercial Services	🔒	🔒	🔒	🔒	🔒
15	RAKBANK	Banks	🔒	🔒	🔒	🔒	🔒
16	Mashreq	Banks	🔒	🔒	🔒	🔒	🔒
17	Borouge	Chemicals	🔒	🔒	🔒	🔒	🔒
18	Aldar	Real Estate Services	🔒	🔒	🔒	🔒	🔒
19	Emirates Islamic Bank	Banks	🔒	🔒	🔒	🔒	🔒
20	Commercial Bank Of Dubai	Banks	🔒	🔒	🔒	🔒	🔒
21	NBF	Banks	🔒	🔒	🔒	🔒	🔒
22	Air Arabia	Airlines	🔒	🔒	🔒	🔒	🔒
23	Aramex	Logistics	🔒	🔒	🔒	🔒	🔒
24	Noor Bank	Banks	🔒	🔒	🔒	🔒	🔒
25	Damac	Real Estate Services	🔒	🔒	🔒	🔒	🔒



# Definitions.



## 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.

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.



### 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.

# Market Research Methodology.

Brand Finance conducted original market research in 10 sectors across 29 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 2019.



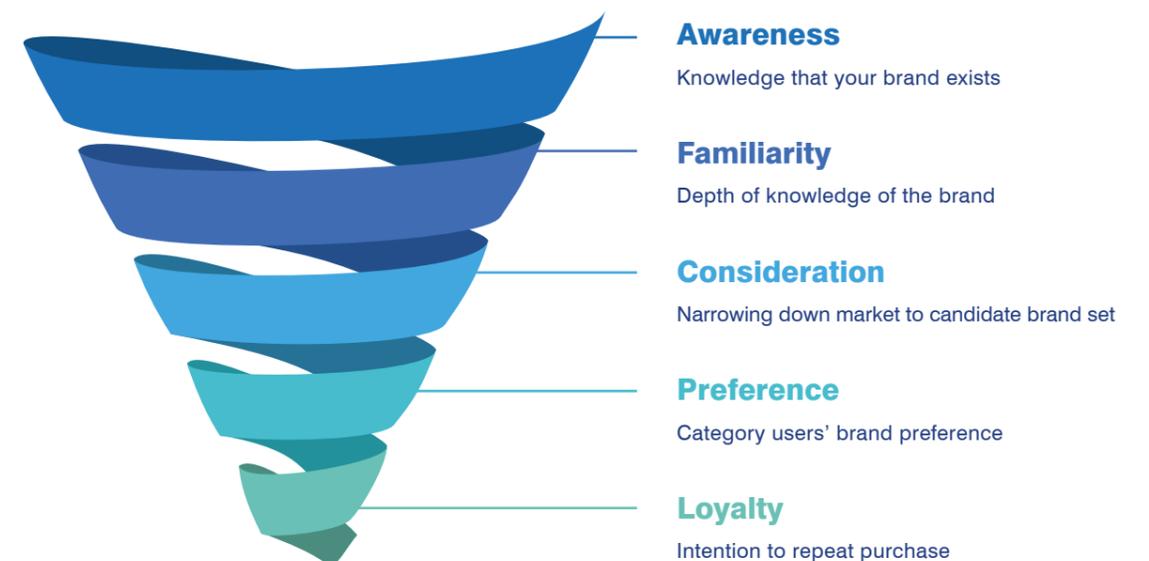
# Stakeholder Equity Measures.

## Key Metrics

- + Reputation
- + Innovation
- + Value for Money
- + Emotional Fit
- + Recommendation
- + Quality etc.

## Brand conversion funnel

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



# 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

**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 +

**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

**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

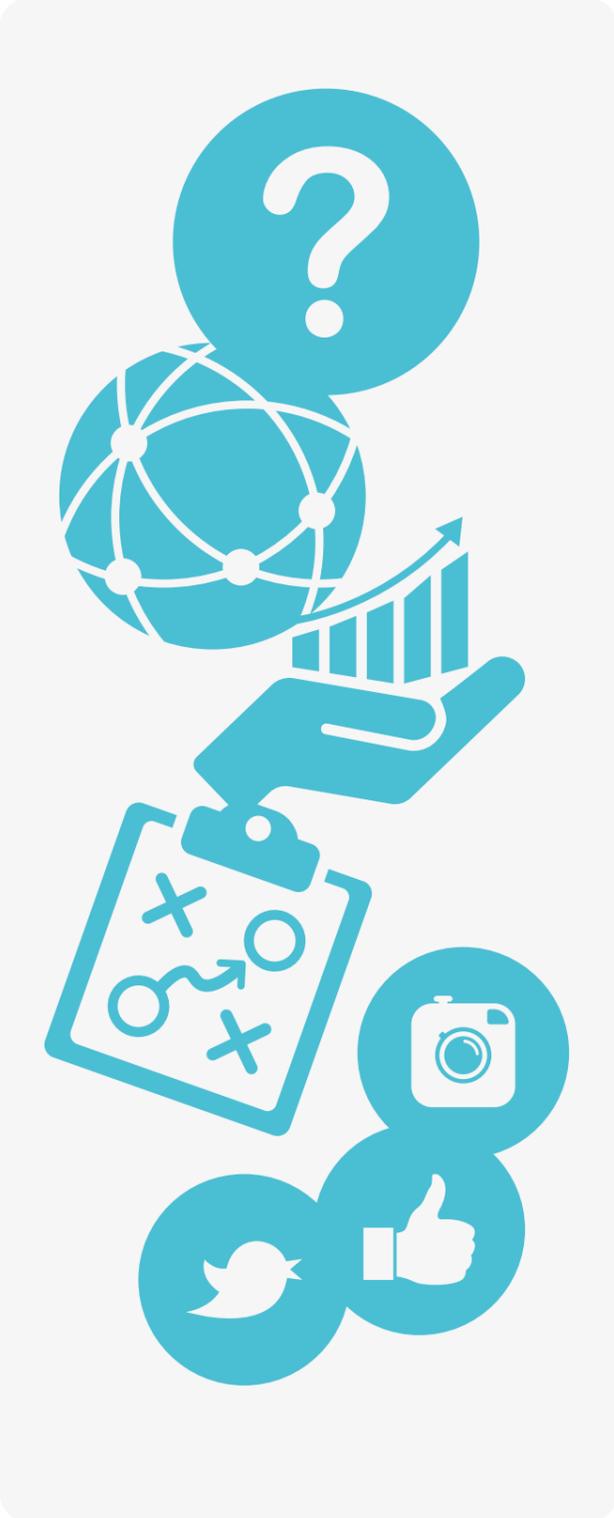
We help marketers to connect their brands to business performance by evaluating the return on investment (ROI) of brand-based decisions and strategies.

We provide financiers 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 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 25  
UAE  
BRAND**



**MOST VALUABLE  
UAE  
BRAND**



**STRONGEST  
UAE  
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<sup>®</sup>



## 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)

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# 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	Ajimon Francis	a.francis@brandfinance.com	+91 989 208 5951
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 55 9197 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 11 770 9991
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	+214 803 3424
Vietnam	Lai Tien Manh	m.lai@brandfinance.com	+84 90 259 82 28





## Contact us.

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**The World's Leading Independent Brand Valuation Consultancy**

**T:** +44 (0)20 7389 9400

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

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