



Germany

100

2018

The annual report on the most valuable German brands
May 2018

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.

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
- Technical Credibility
- Transparency
- Expertise.

Brand Finance puts thousands of the world’s biggest brands to the test every year, evaluating which are the strongest and most valuable.

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

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For further information on Brand Finance®’s services and valuation experience, please contact your local representative:

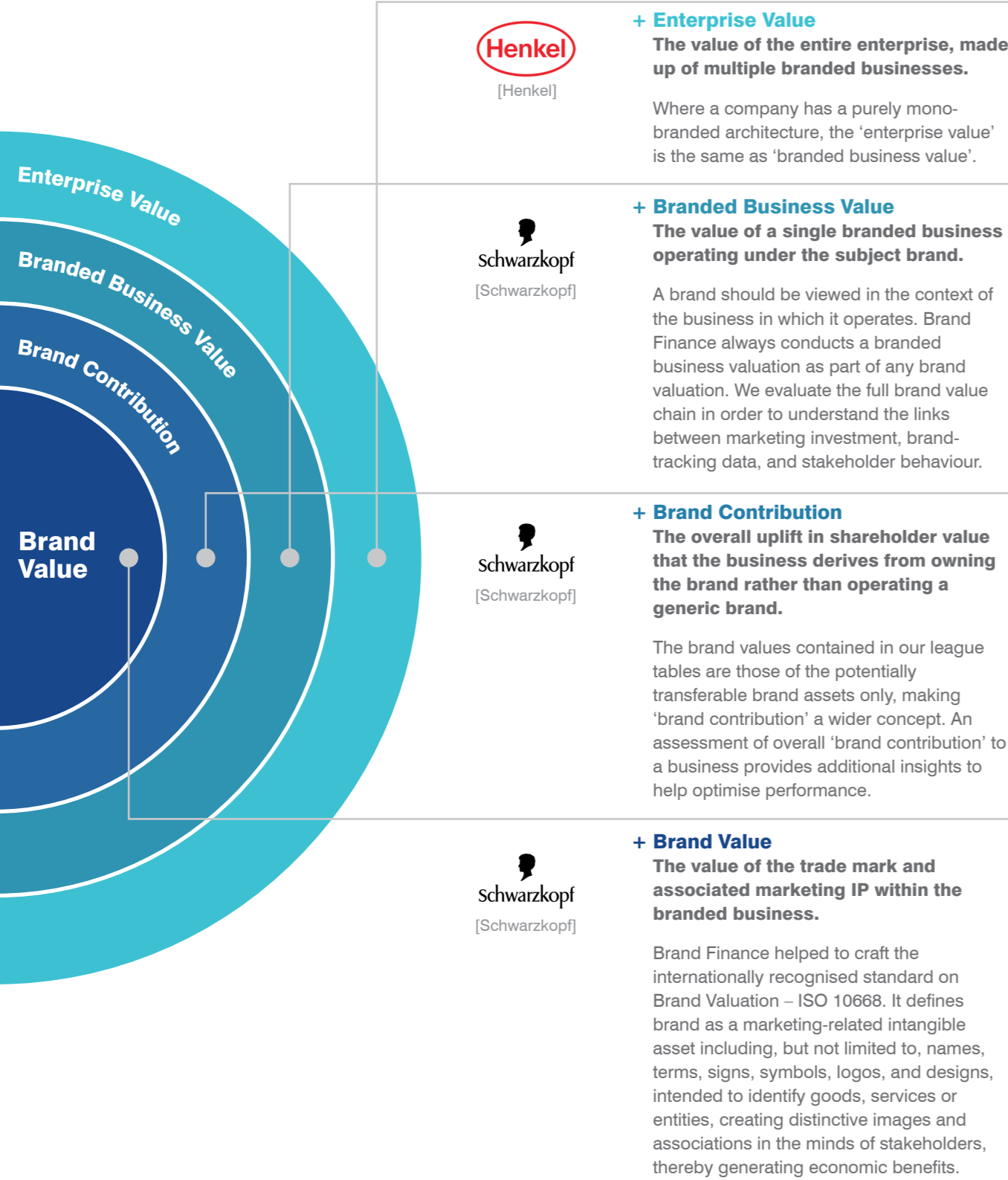
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Definitions.

Brand Value



Brand Strength

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

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

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

Brand Strength Index	Marketing Investment	Widely recognised factors deployed by marketers to create brand loyalty and market share.
	Stakeholder Equity	Perceptions of the brand among different stakeholder groups, with customers being the most important.
	Business Performance	Quantitative market and financial measures representing the success of the brand in achieving price and volume premium.



Executive Summary.



Mercedes-Benz Growth

Mercedes-Benz grew its global brand value by 18% to €37.3 billion, taking pole position as Germany’s most valuable brand. Mercedes’ surge in brand value was driven largely by a big increase in forecast revenue as car sales increased by 8% to 2.4 million vehicles. As a result, Mercedes jumped from third to first on the German brand value table and also became the world’s most valuable automobile brand.

Mercedes has particularly focused on sales into China, with a 28% increase in Chinese sales from 465,000 in 2016, to 595,000 last year. Mercedes has strong brand recognition in China, where it is identified as an aspirational car brand, offering both a high-status and high-quality product. China offers further significant growth potential for Mercedes, with China now the world’s largest automobile market.

Globally, Mercedes refreshed its iconic G-Class last year, a luxury sports utility vehicle which has sold approximately 300,000 vehicles over the last 40 years. The G-Class represented a signature Mercedes product based upon reliability and dependability, with

“Mercedes-Benz invented the automobile and is now leading the industry with a brand strategy focused on electrification. Their global brand success has been driven by the introduction of a new generation of vehicles led by their renewed foray into SUVs and smooth evolution of new technologies, to move away from traditional internal combustion engines.”

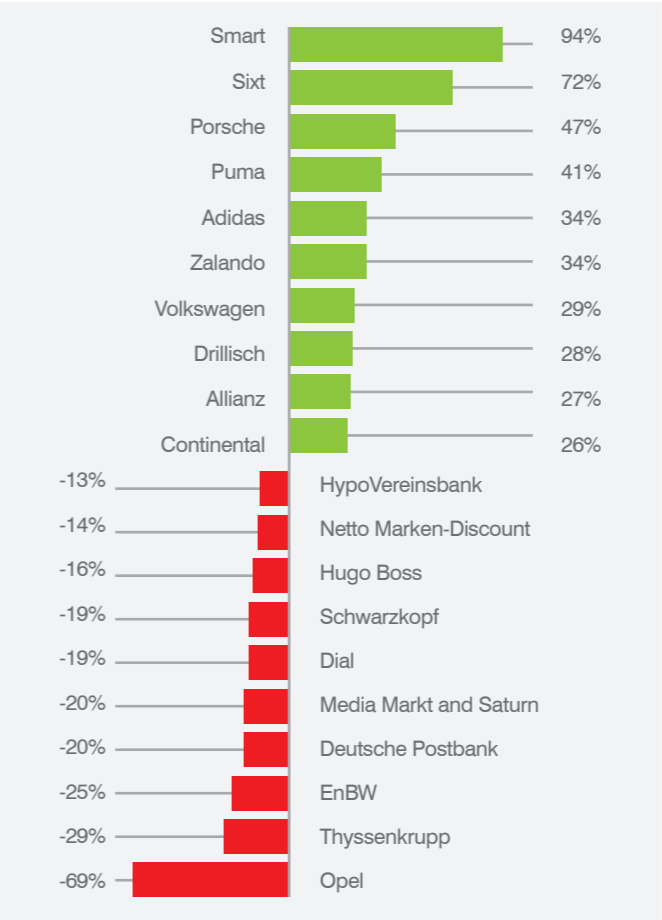
David Haigh
CEO, Brand Finance

80% of the vehicles still in service. More broadly, Mercedes is also enhancing its product range, moving towards using new technologies for in-car controls, including digital touchscreens and speech control for various features, whilst also planning to electrify its entire range of cars.

Germany’s Top Brands Led by Automobile Sector

Recording only slight brand-value growth, BMW (brand value up 2% to €35.5 billion) fell from first to second place on the ranking table of Germany’s most valuable brands. Overtaken by Mercedes, BMW has also dedicated significant resources to prepare for the gradual obsolescence of the traditional internal combustion engine. This corporate strategy is not yet paying strong brand dividends, despite the introduction of BMW’s electric i3 and i8 vehicles with very distinctive styling.

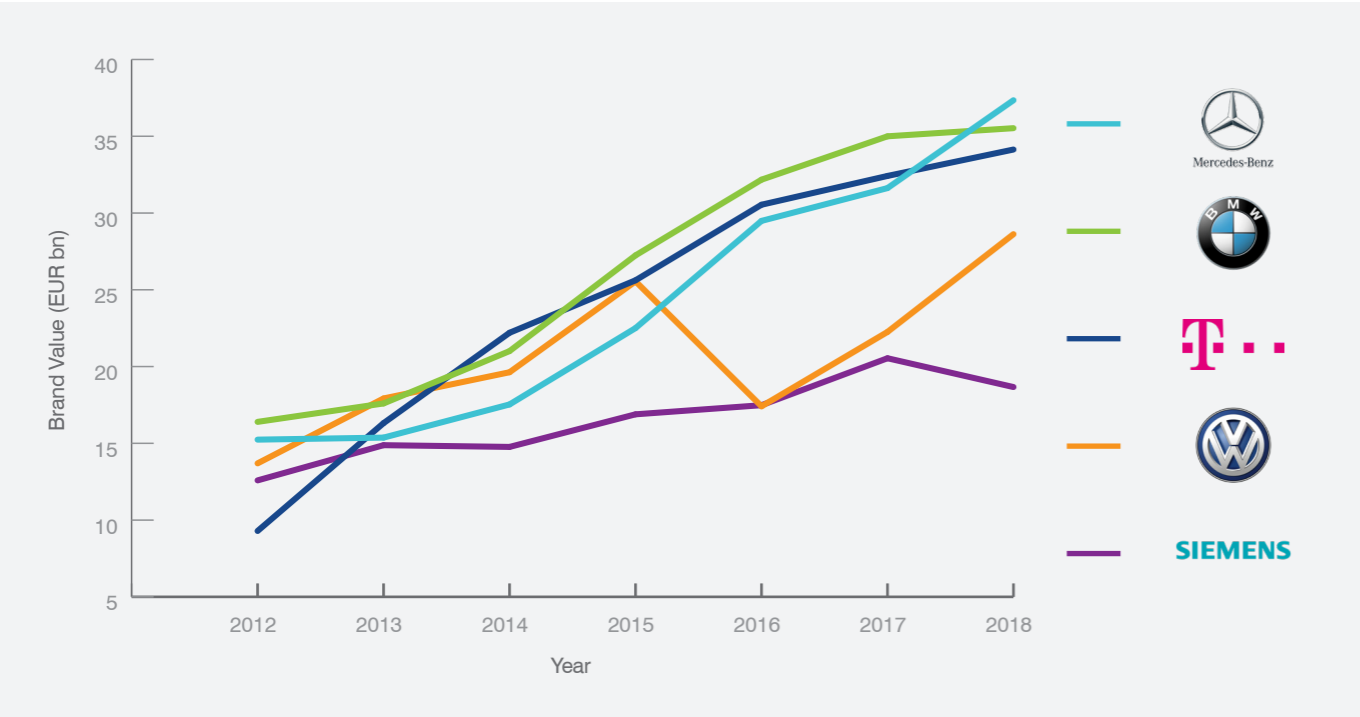
Brand Value Change 2017-2018 (%)



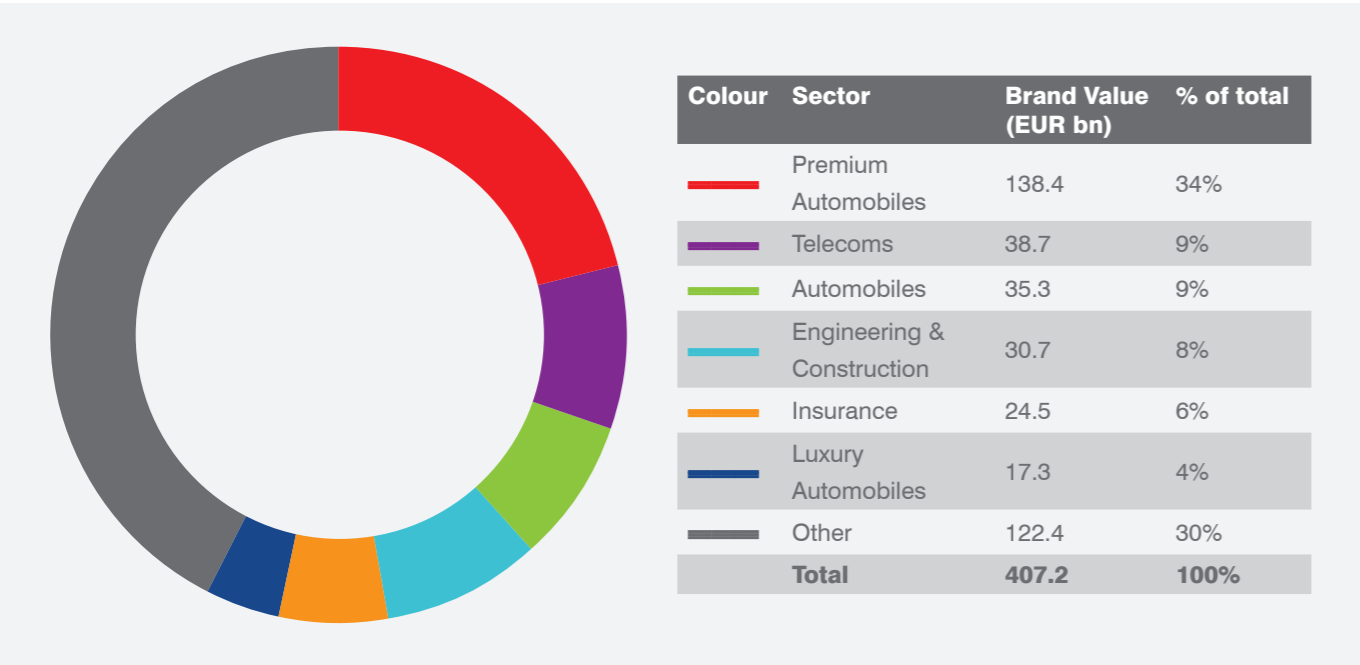
Top 10 Most Valuable Brands

	1	Rank 2018: 1 2017: 3	BV 2018: €37,346m BV 2017: €31,623m 18% Brand Rating: AAA-
	2	Rank 2018: 2 2017: 1	BV 2018: €35,526m BV 2017: €34,996m 2% Brand Rating: AAA
	3	Rank 2018: 3 2017: 2	BV 2018: €34,135m BV 2017: €32,415m 5% Brand Rating: AA+
	4	Rank 2018: 4 2017: 4	BV 2018: €28,623m BV 2017: €22,255m 29% Brand Rating: AAA
	5	Rank 2018: 5 2017: 5	BV 2018: €18,665m BV 2017: €20,541m -9% Brand Rating: AAA
	6	Rank 2018: 6 2017: 7	BV 2018: €17,197m BV 2017: €13,521m 27% Brand Rating: AAA-
	7	Rank 2018: 7 2017: 6	BV 2018: €16,442m BV 2017: €16,006m 3% Brand Rating: AA+
	8	Rank 2018: 8 2017: 10	BV 2018: €16,199m BV 2017: €11,029m 47% Brand Rating: AAA
	9	Rank 2018: 9 2017: 8	BV 2018: €14,501m BV 2017: €13,486m 8% Brand Rating: AA-
	10	Rank 2018: 10 2017: 9	BV 2018: €12,710m BV 2017: €11,162m 14% Brand Rating: AAA-

Brand Value Over Time



Brand Value by Sector



Behind BMW and Mercedes, Volkswagen (brand value up 29% to €28.6 billion) achieved strong brand value growth last year with improved revenue forecasts. In addition to the marquee Volkswagen brand, it also benefits from being part of the larger Volkswagen Group. Volkswagen Group is particularly looking to improve the relationship across its family of brands as part of its medium-term strategy plans. Amidst this broader vision, the corporate leadership recognises that each brand benefits from membership of the Volkswagen Group community, allowing for expertise to be shared amongst the brands for their collective benefit, while also presenting specialised features and brand attributes to customers.

Smart Accelerates as Fastest Growing German Brand

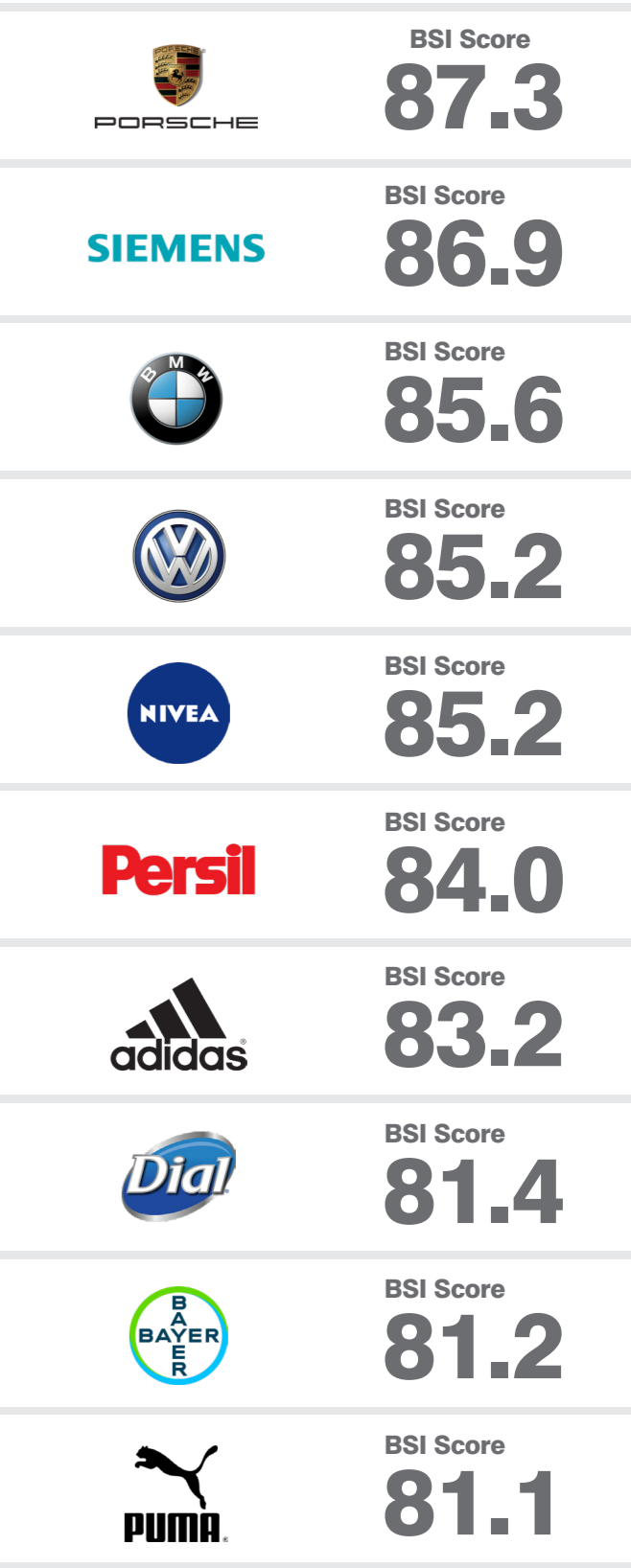
Smart (up 94% to €1.5 billion) is the fastest growing brand amongst Germany's Top 100 brands. The automobile brand, owned by the same parent company as Mercedes, was a new entrant in the Top 100 this year, entering at 49th position after a year of remarkable brand value growth. Consumers globally have been attracted to the urban convenience of Smart cars, which combine exceptional fuel economy with a high degree of manoeuvrability.

Porsche: Germany's Strongest Brand

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. Along with the level of revenues, brand strength is a crucial driver of brand value.

According to these criteria, Porsche (brand value up 47% to €16.2 billion) was Germany's strongest brand, earning a brand strength rating of AAA. The high-end car brand benefited from the successful launch of a new hybrid model, the Panamera 4 E-Hybrid, focused on combining both sustainability and high performance. Porsche's brand value has grown remarkably quickly over the last year and continues to have strong growth potential with the promise of further sports models following on from the Porsche 918 Spyder.

Top 10 Strongest Brands



Brand Finance Germany 100 (EUR m).

Top 100 most valuable German brands 1-50

Rank 2018	Rank 2017	Brand name	Sector	Brand value (EUR m) 2018	% change	Brand value (EUR m) 2017	Brand rating 2018	Brand rating 2017
1	3	Mercedes-Benz	Premium Automobiles	37,346	+18%	31,623	AAA-	AAA-
2	1	BMW	Premium Automobiles	35,526	+2%	34,996	AAA	AAA-
3	2	T (Deutsche Telekom)	Telecoms	34,135	+5%	32,415	AA+	AA+
4	4	Volkswagen	Automobiles	28,623	+29%	22,255	AAA	AAA
5	5	Siemens	Engineering & Construction	18,665	-9%	20,541	AAA	AAA-
6	7	Allianz	Insurance	17,197	+27%	13,521	AAA-	AA
7	6	Bosch	Engineering & Construction	16,442	+3%	16,006	AA+	AAA-
8	10	Porsche	Luxury Automobiles	16,199	+47%	11,029	AAA	AAA
9	8	SAP	Internet & Software	14,501	+8%	13,486	AA-	AA-
10	9	Audi	Premium Automobiles	12,710	+14%	11,162	AAA-	AAA-
11	12	Adidas	Apparel	🔒	🔒	🔒	🔒	🔒
12	11	DHL	Logistics	🔒	🔒	🔒	🔒	🔒
13	13	Aldi	Retail	🔒	🔒	🔒	🔒	🔒
14	14	Lidl	Retail	🔒	🔒	🔒	🔒	🔒
15	16	BASF	Chemicals	🔒	🔒	🔒	🔒	🔒
16	17	Fresenius	Pro Services - Healthcare	🔒	🔒	🔒	🔒	🔒
17	15	Nivea	Cosmetics & Personal Care	🔒	🔒	🔒	🔒	🔒
18	18	Deutsche Bank	Banks	🔒	🔒	🔒	🔒	🔒
19	19	Bayer	Pharma	🔒	🔒	🔒	🔒	🔒
20	23	Continental	Tires	🔒	🔒	🔒	🔒	🔒
21	26	Deutsche Post	Logistics	🔒	🔒	🔒	🔒	🔒
22	New	Innogy	Utilities	🔒	🔒	🔒	🔒	🔒
23	20	Munich Re	Insurance	🔒	🔒	🔒	🔒	🔒
24	31	Zalando	Retail	🔒	🔒	🔒	🔒	🔒
25	21	TUI	Leisure & Tourism	🔒	🔒	🔒	🔒	🔒
26	22	MAN	Automobiles	🔒	🔒	🔒	🔒	🔒
27	40	Puma	Apparel	🔒	🔒	🔒	🔒	🔒
28	27	Metro	Retail	🔒	🔒	🔒	🔒	🔒
29	New	Uniper	Utilities	🔒	🔒	🔒	🔒	🔒
30	29	Edeka	Retail	🔒	🔒	🔒	🔒	🔒
31	41	Lufthansa	Airlines	🔒	🔒	🔒	🔒	🔒
32	28	DB	Logistics	🔒	🔒	🔒	🔒	🔒
33	33	Kaufland	Retail	🔒	🔒	🔒	🔒	🔒
34	36	DZ Bank	Banks	🔒	🔒	🔒	🔒	🔒
35	35	Ergo	Insurance	🔒	🔒	🔒	🔒	🔒
36	37	E.ON	Utilities	🔒	🔒	🔒	🔒	🔒
37	32	HeidelbergCement	Engineering & Construction	🔒	🔒	🔒	🔒	🔒
38	38	Infineon Technologies	Technology	🔒	🔒	🔒	🔒	🔒
39	34	Schwarzkopf	Cosmetics & Personal Care	🔒	🔒	🔒	🔒	🔒
40	43	Linde	Chemicals	🔒	🔒	🔒	🔒	🔒
41	45	Commerzbank	Banks	🔒	🔒	🔒	🔒	🔒
42	44	Hannover Re	Insurance	🔒	🔒	🔒	🔒	🔒
43	39	HUGO BOSS	Apparel	🔒	🔒	🔒	🔒	🔒
44	30	thyssenkrupp	Mining	🔒	🔒	🔒	🔒	🔒
45	50	BayWa	Food	🔒	🔒	🔒	🔒	🔒
46	New	Knorr	Food	🔒	🔒	🔒	🔒	🔒
47	New	Union Investment	Banks	🔒	🔒	🔒	🔒	🔒
48	42	Media Markt and Saturn	Retail	🔒	🔒	🔒	🔒	🔒
49	New	Smart	Automobiles	🔒	🔒	🔒	🔒	🔒
50	New	Schaeffler	Auto Components	🔒	🔒	🔒	🔒	🔒

Top 100 most valuable German brands 51-100

Rank 2018	Rank 2017	Brand name	Sector	Brand value (EUR m) 2018	% change	Brand value (EUR m) 2017	Brand rating 2018	Brand rating 2017
51	46	Radeberger	Beers	🔒	🔒	🔒	🔒	🔒
52	New	Hochtief	Engineering & Construction	🔒	🔒	🔒	🔒	🔒
53	New	1&1 Internet	Internet & Software	🔒	🔒	🔒	🔒	🔒
54	New	Evonik	Chemicals	🔒	🔒	🔒	🔒	🔒
55	49	Dr. Oetker	Food	🔒	🔒	🔒	🔒	🔒
56	48	Netto Marken-Discount	Retail	🔒	🔒	🔒	🔒	🔒
57	47	EnBW	Utilities	🔒	🔒	🔒	🔒	🔒
58	New	Prosieben	Media	🔒	🔒	🔒	🔒	🔒
59	New	Deutsche Postbank	Banks	🔒	🔒	🔒	🔒	🔒
60	24	Opel	Automobiles	🔒	🔒	🔒	🔒	🔒
61	New	Linde Material Handling	Technology	🔒	🔒	🔒	🔒	🔒
62	New	Hella	Auto Components	🔒	🔒	🔒	🔒	🔒
63	New	Merck	Pharma	🔒	🔒	🔒	🔒	🔒
64	New	Covestro	Chemicals	🔒	🔒	🔒	🔒	🔒
65	New	Bausparkasse Schwäbisch Hall	Banks	🔒	🔒	🔒	🔒	🔒
66	New	ProsiebenSat.1	Media	🔒	🔒	🔒	🔒	🔒
67	New	Jacobs	Non Alcoholic Drinks	🔒	🔒	🔒	🔒	🔒
68	New	Dial	Household Products	🔒	🔒	🔒	🔒	🔒
69	New	Bonprix	Retail	🔒	🔒	🔒	🔒	🔒
70	New	Vonovia	Pro Services - Real Estate	🔒	🔒	🔒	🔒	🔒
71	New	Brenntag	Chemicals	🔒	🔒	🔒	🔒	🔒
72	New	MTU Aero Engines	Aerospace & Defence	🔒	🔒	🔒	🔒	🔒
73	New	Rheinmetall	Aerospace & Defence	🔒	🔒	🔒	🔒	🔒
74	New	Beck's	Beers	🔒	🔒	🔒	🔒	🔒
75	New	Syoss	Cosmetics & Personal Care	🔒	🔒	🔒	🔒	🔒
76	New	Persil	Household Products	🔒	🔒	🔒	🔒	🔒
77	New	STILL	Technology	🔒	🔒	🔒	🔒	🔒
78	New	Galeria Kaufhof	Retail	🔒	🔒	🔒	🔒	🔒
79	New	Freenet	Telecoms	🔒	🔒	🔒	🔒	🔒
80	New	Sat.1	Media	🔒	🔒	🔒	🔒	🔒
81	New	Landesbank Baden Wurttemberg	Banks	🔒	🔒	🔒	🔒	🔒
82	New	Hamburg Süd	Logistics	🔒	🔒	🔒	🔒	🔒
83	New	trivago	Internet & Software	🔒	🔒	🔒	🔒	🔒
84	New	DVB Bank	Banks	🔒	🔒	🔒	🔒	🔒
85	New	Leoni	Technology	🔒	🔒	🔒	🔒	🔒
86	New	NORD/LB	Banks	🔒	🔒	🔒	🔒	🔒
87	New	Fa	Cosmetics & Personal Care	🔒	🔒	🔒	🔒	🔒
88	New	Delivery Hero	Internet & Software	🔒	🔒	🔒	🔒	🔒
89	New	DekaBank	Banks	🔒	🔒	🔒	🔒	🔒
90	New	Osram	Technology	🔒	🔒	🔒	🔒	🔒
91	New	Sixt	Pro Services - Car Rental	🔒	🔒	🔒	🔒	🔒
92	New	easyCredit	Banks	🔒	🔒	🔒	🔒	🔒
93	New	HypoVereinsbank	Banks	🔒	🔒	🔒	🔒	🔒
94	New	AIDA	Leisure & Tourism	🔒	🔒	🔒	🔒	🔒
95	New	Otto	Retail	🔒	🔒	🔒	🔒	🔒
96	New	DG HYP	Banks	🔒	🔒	🔒	🔒	🔒
97	New	Helaba	Banks	🔒	🔒	🔒	🔒	🔒
98	New	Drillisch	Telecoms	🔒	🔒	🔒	🔒	🔒
99	New	Gliss	Cosmetics & Personal Care	🔒	🔒	🔒	🔒	🔒
100	New	Salzgitter	Mining	🔒	🔒	🔒	🔒	🔒

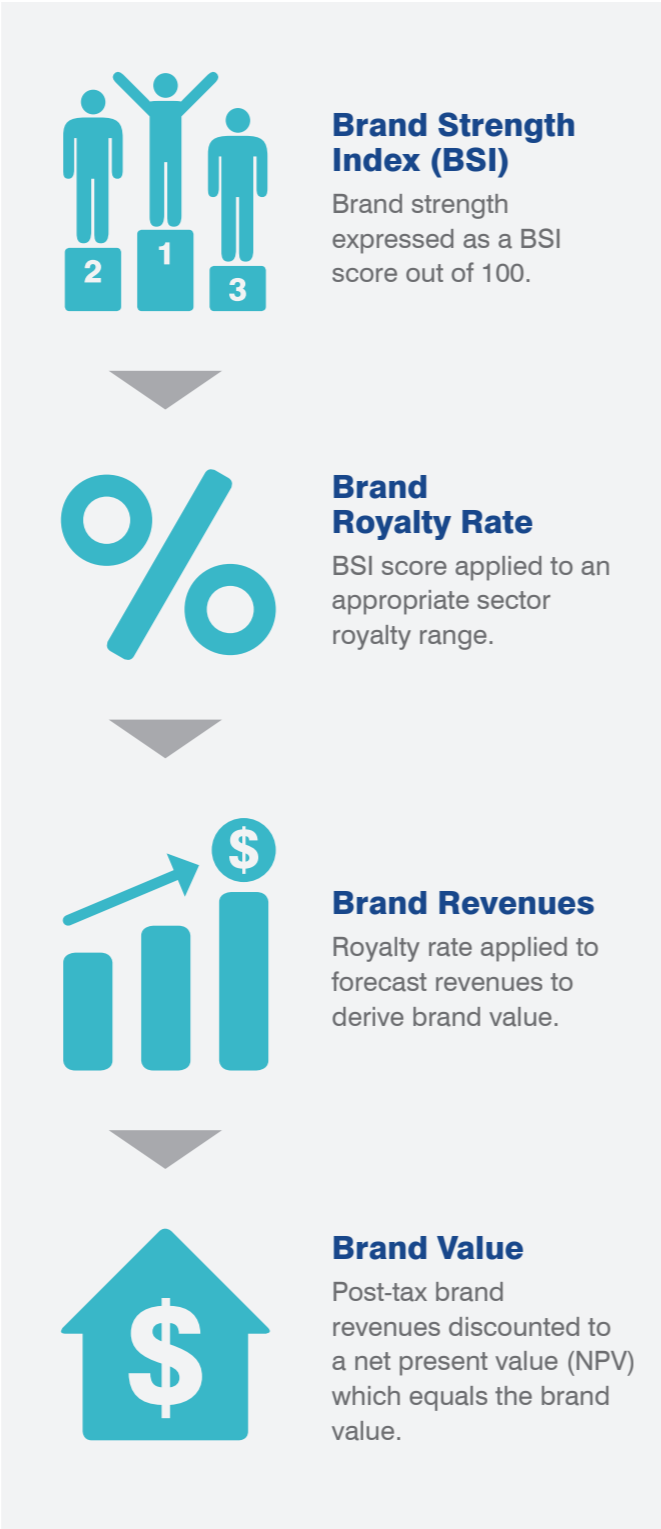
Methodology.

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.



Understand Your Brand’s Value.

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.

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
- + Insurance
- + Banks
- + Telecoms

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

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What are the benefits of a Brand Value Report?



Insight

Provide insight as to how the brand is performing vs. key competitors on underlying measures and drivers of brand value and brand strength.



Strategy

Understand where brand value is being generated by region and channel in order to identify areas of opportunity that warrant further investigation.



Benchmarking

Track year-on-year changes to brand value and set long-term objectives against which high-level brand performance can be benchmarked.



Education

Provide a platform of understanding which the company can use to educate employees on the importance of the brand.



Communication

Communicate your brand’s success to shareholders, customers, and other strategically selected audiences.



Understanding

Understand and appreciate the value of your brand as an asset of the business.

Consulting Services.



MARKETING

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

FINANCE

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

TAX

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

LEGAL

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

Communications Services.

We offer a variety of services to help communicate your brand's success.



Brand Finance®

Strongest Global Brand 2018

Your Brand

Example digital endorsement stamp for use on your website as well as in investor relations and advertising, to recognise your brand's performance.



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