



Aerospace & Defence

25

2023

The annual report on the most valuable and strongest Aerospace & Defence brands
March 2023

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About Brand Finance.

Brand Finance is the world's leading 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 25 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 thousands of the world's biggest brands to the test every year. Ranking brands across all sectors and countries, we publish over 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.



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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 performance and offers a cost-effective way to gaining a better understanding of your position against peers.

Visit brandirectory.com/request-a-valuation
or email enquiries@brandfinance.com



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Communication



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Brand Valuation
Summary



Brand
Strength Tracking



Royalty Rates



Cost of
Capital Analysis



Customer
Research Findings



Competitor
Benchmarking

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Benefits

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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

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Brand Finance Group.



Brand Finance
Institute

Brand Finance Institute

Brand Finance Institute is the educational division of Brand Finance, whose purpose is to create and foster a professional environment for knowledge-sharing and networking among practitioners and experts in the market. BFI organises events, in-company training, and corporate educational initiatives around the world. In the quest for marketing excellence and with the purpose to equip the brand valuation and strategy practitioners with the necessary skills and tools, we have developed a wide range of programmes and certifications in collaboration with the most coveted business schools, universities and thought leaders in the field.

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.

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®



Global Brand Equity Monitor

- Original market research on over **5,000 brands**
- **38 countries** and **31 sectors** covered
- More than **150,000 respondents** surveyed annually
- We are now **in our 7th consecutive year** conducting the study

Visit brandirectory.com/consumer-research
or email enquiries@brandfinance.com



Foreword.



David Haigh
Chairman & CEO,
Brand Finance

Brand valuation helps companies understand the value of their brand and how it contributes to the overall value of the company. This important understanding can inform decision-making related to marketing and branding efforts, as well as provide a benchmark for future performance. It can also be used to help attract investors and secure financing, as a strong brand can be a valuable asset.

Additionally, brand valuation can be useful in the event of a merger or acquisition, as it can help determine the value of the brand being acquired. Overall, brand valuation helps organisations understand the worth of their brand and how it fits into their overall business strategy.

A strong brand can lead to improved business returns in several ways. First, a strong brand can help a company differentiate itself from its competitors and establish a unique identity in the market, which can lead to increased customer loyalty and retention. This, in turn, can lead to higher sales and revenue. A strong brand can also help a company command a higher price for its products or services, as consumers are willing to pay more for a brand they perceive as high-quality and trustworthy. In addition, a strong brand can help a company attract top talent, as employees may be more attracted to work for a well-known and reputable brand. Finally, a strong brand can provide a company with a competitive advantage and help it weather economic downturns or industry disruptions.

This year, Brand Finance has invested more in researching and understanding customer perception of brands across the world than ever before, with original research taking place in dozens of jurisdictions globally. The report you are reading is based on this extensive original research, with the findings representing a catalyst for further conversations.

If you want to help build a stronger brand, or if you want to better understand the value of your brand, please contact the Brand Finance team and I anytime. I look forward to the conversation and helping to build a more profitable future for your brand.

Boeing and Airbus Maintain Dominance at the Top of Global Aerospace & Defence Industry.

- + **Boeing** remains the world's most valuable Aerospace & Defence brand, valued at US\$17.5 billion
- + **Airbus** overtakes Boeing to become the strongest brand with AAA- rating
- + German brands **Rheinmetall** and MTU are the fastest growing Aerospace & Defence brands
- + US based brands dominate the ranking, but Chinese brands grow quickly
- + **Boeing** and **Airbus** have the two highest Sustainability Perceptions Values

Ranking Analysis.



Ranking Analysis.



Boeing remains the world's most valuable Aerospace & Defence brand, valued at US\$17.5 billion

US based large jet manufacturer, **Boeing**, remains the most valuable aerospace and defence brand in 2023, following a 13% brand value increase to US\$17.5 billion. Demand for commercial aircraft increased following the continued recovery of the airline sector as a result of an increased return to global travel following the COVID-19 pandemic. This has helped sustain Boeing's brand value growth, which is 4% higher than its main competitor **Airbus** (brand value up 9% to US\$14.4 billion).

Boeing's brand value does however remain 23% lower than its pre-pandemic value, highlighting the significant

impact that the widespread shutdown of global travel had on the brand and that further growth needs to be implemented in order to sustain the brand's recovery.

Boeing has seen increasing demand for its products, and secured a number of important partnerships, including **Air India's** selection of up to 290 Boeing jets to expand its future fleet. Boeing also continues to serve the US Air Force, being awarded a number of high-value contracts to provide tanker aircraft and additional Next Generation Automated Test Systems in early 2023.

Such contracts will be vital in combination with Boeing's production of domestic aircraft as the brand looks to sustain healthy brand value growth going forward.

Top 10 Most Valuable Aerospace & Defence Brands

© Brand Finance Plc 2023

1 $\leftarrow 1$   US\$17.5 bn +13%	2 $\leftarrow 2$   US\$14.4 bn +9%	3 $\leftarrow 3$   US\$9.5 bn -5%	4 $\leftarrow 4$   US\$6.8 bn +7%	5 $\leftarrow 5$   US\$6.0 bn +2%
6 $\uparrow 7$   US\$5.3 bn +8%	7 $\downarrow 6$   US\$5.2 bn +3%	8 $\leftarrow 8$   US\$4.0 bn +1%	9 $\leftarrow 9$   US\$3.5 bn +2%	10 $\uparrow 12$   US\$3.1 bn +0%

Airbus overtakes Boeing to become the strongest brand with AAA- rating

Airbus (brand value up 9% to US\$14.4 billion) has overtaken rival **Boeing** to become the strongest Aerospace & Defence brand. Its Brand Strength Index Score was 82 out of 100, up 3.4 points year-on-year, with a corresponding AAA- rating. The French brand is also the second most valuable brand in the ranking.

In addition to calculating brand value, Brand Finance also determines the relative strength of brands through a balanced scorecard of metrics evaluating marketing investment, stakeholder equity, and business performance. Compliant with ISO 20671, Brand Finance's assessment of stakeholder equity incorporates original market research data from over 150,000 respondents in 38 countries and across 31 sectors.

Airbus has now surpassed its pre-pandemic brand value after a year in which it saw an increased demand for its products. This allowed the brand to achieve solid financials despite an adverse operating environment that prevented its supply chain from recovering at the pace expected.





The brand has also increased the communication of its work towards helping communities and creating a more sustainable future for the aerospace industry.

This has been done through partnerships with non-profit organisations and the Airbus Foundation. The Foundation facilitates philanthropic initiatives worldwide, using its diverse portfolio of products and capabilities to provide humanitarian aid amongst other positive contributions. This, and Airbus' continued efforts to address the challenges that the aviation industry poses to the environment have helped it build a strong Brand strength score and top the ranking for this metric.



Top 10 Strongest Aerospace & Defence Brands

© Brand Finance Plc 2023

1  2 AIRBUS 81.8 +3.4 AAA-	2  1 BOEING 79.0 -3.1 AA+	3  4 ROLLS ROYCE 73.9 -3.3 AA	4  6 LOCKHEED MARTIN 73.3 -2.2 AA	5  11 SAFRAN 73.3 +0.5 AA
6  9 NORTHROP GRUMMAN 73.0 -1.5 AA	7  8 THALES 72.6 -2.0 AA	8  3 PRATT & WHITNEY 72.4 -4.8 AA	9  7 Raytheon Technologies 72.2 -3.0 AA	10  21 RHEINMETALL GROUP 70.7 +6.4 AA

Global security and aerospace company, **Lockheed Martin**, remains the third most valuable Aerospace & Defence brand despite a 5% year-on-year brand value reduction to US\$9.5 billion. The brand has faced difficulties in relation to global supply issues, however, continues its ongoing expansion of 21st Century capabilities and commercial partnerships to deliver deterrence solutions and value enhancing growth opportunities across its businesses.

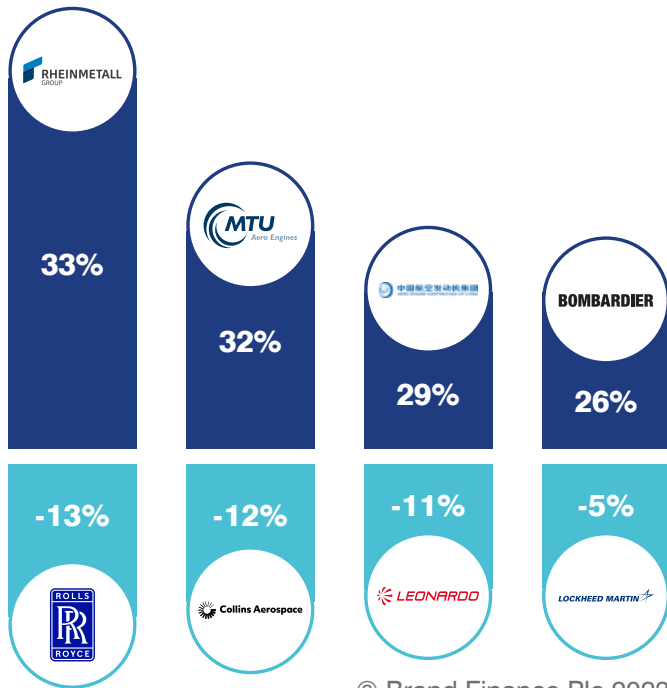
This included a new contract with the U.S. Navy worth potentially more than US\$2 billion to provide the US's first sea-based hypersonic strike capability. **Lockheed Martin** is also actively reinvesting capital with the hope to boost enterprise and brand value in 2024.

German brands Rheinmetall and MTU are the fastest growing Aerospace & Defence brands

German arms manufacturing company, **Rheinmetall**, has seen the fastest year-on-year brand value growth of 33% to US\$1.1 billion. The brand's military arm has achieved particular success in 2022 as a result of increased global defence spending in relation to Russia's ongoing invasion of Ukraine.



Brand Value Change 2022-2023 (%)



© Brand Finance Plc 2023

This is a common theme for other defence focused brands, such as **Northrop Grumman** (brand value up 7% to 6.8 billion). **Rheinmetall's** civilian products have also seen a growing numbers of orders for components and systems to drive electrification, highlighting the brand's position at the centre of the transformation of the industry to full electric mobility.

Fellow German brand **MTU** followed closely behind as the second fastest growing Aerospace & Defence brand with a brand value growth of 32% to US\$1 billion. The aero engine brand's revenue increased by 27% in 2022 despite difficulties with supply chains causing issues. MTU sustained a high order backlog at the end of 2022, highlighting further evidence of the sustained demand for the brand's products, reflecting the pick-up in global air traffic and the confidence placed in MTU by stakeholders.

US based brands dominate the ranking, but Chinese brands grow quickly

There were thirteen US based brands included in the ranking, making up an astonishing 61% of the total brand value of all brands included. Nine of these US brands came in the top fifteen.

The continued dominance of the US in the industry is evident throughout the ranking, further emphasised by the fact that the next largest contributor in terms of number of brands and brand value was France with three brands and 23% of the overall brand value.

Despite US dominance, Chinese brand have seen the largest overall collective year-on-year brand value increase – 109%. This was considerably larger than the next largest increase which was Germany at 32%. Chinese brands' impressive brand value increase comes despite a difficult past couple of years due to Covid lockdowns, highlighting both **AviChina** (brand value up 15% to US\$1.2 billion) and **AECC Aviation Power's** (brand value up 29% to US\$1 billion) resilience in difficult operating conditions.

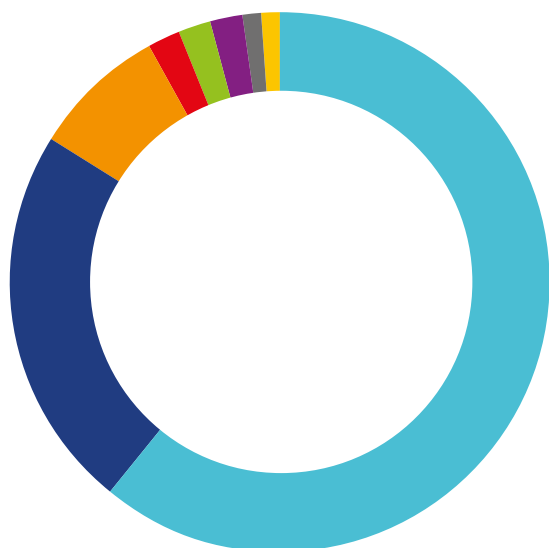
AviChina has played an important role in the development of China's first domestically produced commercial aircraft, the C919, which is placed to rival aircraft produced by **Boeing** and **Airbus**.

While **AECC Aviation Power** is developing domestically produced aircraft engines which will introduce an electric propulsion system and sustainable fuel in order to reduce emissions and noise from its engines. Both brands' innovations highlights a concerted effort to reduce over dependence on US and European manufacturers and suggest further potential growth for Chinese aerospace and defence brands in the coming years as their production capabilities increase.



Brand Value by Country

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COUNTRY	Brand Value (USD m)	% of total	Number of Brands
United States	58,954	61%	13
France	21,883	23%	3
United Kingdom	7,951	8%	2
China	2,181	2%	2
Germany	2,134	2%	2
Italy	1,723	2%	1
Canada	1,059	1%	1
Brazil	819	1%	1
Total	96,704	100.0%	25



Boeing and Airbus have the two highest Sustainability Perceptions Values

As part of its analysis, Brand Finance assesses the role that specific brand attributes play in driving overall brand value. One such attribute, growing rapidly in its significance, is sustainability. Brand Finance assesses how sustainable specific brands are perceived to be, represented by a 'Sustainability Perceptions Score'.

The value that is linked to sustainability perceptions, the 'Sustainability Perceptions Value', is then calculated for each brand. Sustainability has been at the forefront of many Aerospace & Defence brands' communication with stakeholders as brands look to transition towards a more sustainable era of flying.

Boeing and **Airbus** had the two highest Sustainability Perception Values of US\$450 million and US\$399 million a piece. While both brands' position at the top of the Sustainability Perceptions Value table is not an assessment of their overall sustainability performance, it rather indicates how much brand value the brands have tied up in sustainability perception. Boeing and Airbus also had solid Sustainability Perception Scores of 4.06 and 4.37 out of 10 respectively.

Both brands have particularly focused on reducing carbon emissions, looking to invest and innovate in clean technology and set commercial aviation on course for net-zero carbon emissions.

Sustainable aviation fuel is the primary focus for aerospace brands and can reduce life-cycle CO2 emissions by up to 80% compared to conventional fuel. As global airlines look to update their fleets to improve their carbon emissions, large aerospace manufacturers are set to further benefit from producing increasingly environmental conscious aircraft, likely boosting both brand value and sustainability perception value in the future.



Largest Sustainability Perceptions Value

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1		2		3		4		5	
US\$0.45 bn	US\$0.40 bn	US\$0.24 bn	US\$0.19 bn	US\$0.15 bn					
4.06	4.37	3.95	4.46	4.60					
6		7		8		9		10	
US\$0.15 bn	US\$0.14 bn	US\$0.11 bn	US\$0.10 bn	US\$0.10 bn					
3.95	4.20	4.44	4.42	4.82					

Brand Value Ranking (USDm).

Top 25 most valuable Aerospace & Defence brands 1-25

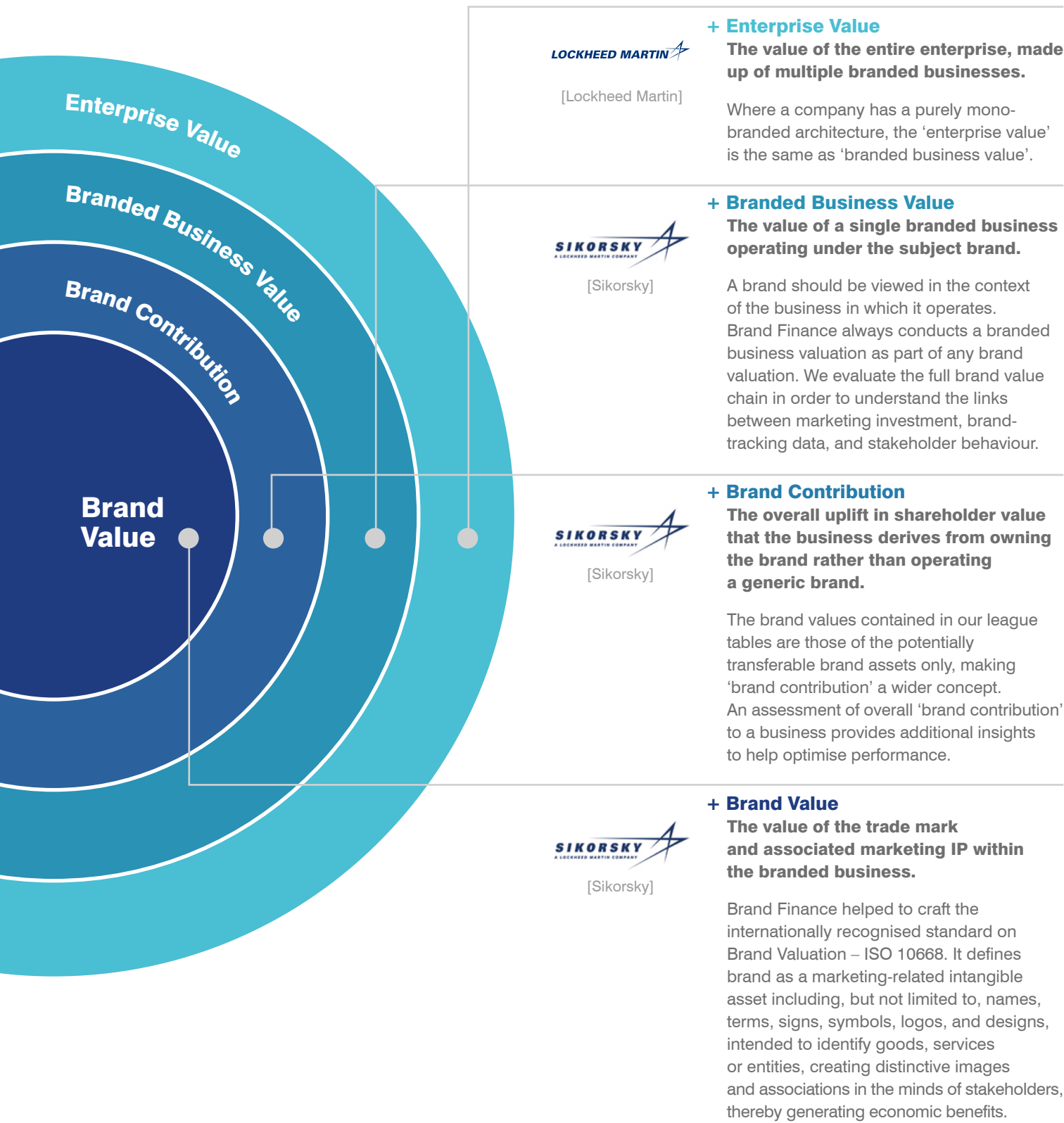
2023 Rank	2022 Rank		Brand	COUNTRY	2023 Brand Value	Brand Value Change	2022 Brand Value	2023 Brand Rating	2022 Brand Rating
1	1	←	Boeing	United States	17,483	+13%	15,497	AA+	AAA-
2	2	←	Airbus	France	14,393	+9%	13,256	AAA-	AA+
3	3	←	Lockheed Martin	United States	9,525	-5%	9,979	AA	AA+
4	4	←	Northrop Grumman	United States	6,788	+7%	6,355	AA	AA+
5	5	←	Raytheon	United States	6,050	+2%	5,916	AA	AA+
6	7	↑	General Dynamics	United States	5,263	+8%	4,865	AA-	AA-
7	6	↓	BAE Systems	United Kingdom	5,202	+3%	5,073	AA	AA-
8	8	←	Safran	France	4,027	+1%	3,995	AA	AA
9	9	←	Thales	France	3,463	+2%	3,404	AA	AA+
10	12	↑	Pratt & Whitney	United States	3,142	+0%	3,134	AA	AA+
11	13	↑	L3 Harris	United States	🔒	🔒	🔒	🔒	🔒
12	11	↓	Collins Aerospace	United States	🔒	🔒	🔒	🔒	🔒
13	10	↓	Rolls-Royce (Aerospace & Defence)	United Kingdom	🔒	🔒	🔒	🔒	🔒
14	15	↑	Leonardo	Italy	🔒	🔒	🔒	🔒	🔒
15	16	↑	Spirit Aerosystems	United States	🔒	🔒	🔒	🔒	🔒
16	17	↑	Gulfstream	United States	🔒	🔒	🔒	🔒	🔒
17	18	↑	AviChina	China	🔒	🔒	🔒	🔒	🔒
18	19	↑	Rheinmetall	Germany	🔒	🔒	🔒	🔒	🔒
19	20	↑	Bombardier	Canada	🔒	🔒	🔒	🔒	🔒
20	24	↑	MTU	Germany	🔒	🔒	🔒	🔒	🔒
21	21	←	Howmet Aerospace	United States	🔒	🔒	🔒	🔒	🔒
22	-	New	AECC Aviation Power	China	🔒	🔒	🔒	🔒	🔒
23	22	↓	Embraer	Brazil	🔒	🔒	🔒	🔒	🔒
24	25	↑	Transdigm	United States	🔒	🔒	🔒	🔒	🔒
25	-	New	Teledyne Tech	United States	🔒	🔒	🔒	🔒	🔒





Methodology.

Definitions.



Brand Valuation Methodology.

Definition of Brand

Brand is defined as a bundle of trademarks and associated IP which can be used to take advantage of the perceptions of all stakeholders to provide a variety of economic benefits to the entity.

Brand Value

Brand value refers to the present value of earnings specifically related to brand reputation. Organisations own and control these earnings by owning trademark rights.

All brand valuation methodologies are essentially trying to identify this, although the approach and assumptions differ. As a result published brand values can be different.

These differences are similar to the way equity analysts provide business valuations that are different to one another. The only way you find out the “real” value is by looking at what people really pay.

As a result, Brand Finance always incorporates a review of what users of brands actually pay for the use of brands in the form of brand royalty agreements, which are found in more or less every sector in the world.

This is sometimes known as the “Royalty Relief” methodology and is by far the most widely used approach for brand valuations since it is grounded in reality.

It is the basis for a public rankings but we always augment it with a real understanding of people’s perceptions and their effects on demand – from our database of market research on over 3000 brands in over 30 markets.

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.

1



Brand Impact

We review what brands already pay in royalty agreements. This is augmented by an analysis of how brands impact profitability in the sector versus generic brands.

This results in a range of possible royalties that could be charged in the sector for brands (for example a range of 0% to 2% of revenue)

2

Brand Strength

We adjust the rate higher or lower for brands by analysing Brand Strength. We analyse brand strength by looking at three core pillars: “Inputs” which are activities supporting the future strength of the brand; “Equity” which are real current perceptions sourced from our market research and other data partners; “Output” which are brand-related performance measures such as market share.



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 Brand Rating up to AAA+ in a format similar to a credit rating.

3



Brand Impact × Brand Strength

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%.

Forecast Brand Value Calculation

4

We determine brand-specific revenues as a proportion of parent company revenues attributable to the brand in question and forecast those revenues by analysing historic revenues, equity analyst forecasts, and economic growth rates.



We then apply the royalty rate to the forecast revenues to derive brand revenues and apply the relevant valuation assumptions to arrive at a discounted, post-tax present value which equals the brand value.

Brand Strength.

Brand Strength

Analytical rigour and transparency are at the heart of our approach to brand measurement at Brand Finance. Therefore, in order to adequately understand the strength of brands we conduct a structured, quantitative review of data that reflect the 'Brand Value Chain' of brand-building activities, leading to brand awareness, perceptions and onwards to brand-influenced customer behaviour.

To manage the 'Brand Value Chain' process effectively we create and use the "Brand Strength Index" (BSI). This index is essentially a modified Balanced Scorecard split between the three core pillars of the 'Brand Value Chain': **Brand Inputs**, **Brand Equity** and **Brand Performance**.



1 Attribute Selection and Weighting

Although we follow a general structure incorporating the three pillars (Brand Inputs, Brand Equity and Brand Performance), the attributes included are different depending on the sector. A brand strength index for a luxury apparel brand will differ in structure from an index designed for a telecommunications brand. An index for luxury apparel brand may emphasize the exclusiveness, word of mouth recommendation, and price premium, whereas an index for a telecommunications company may emphasize customer service and ARPU as important metrics.

These attributes are weighted according to their perceived importance in driving the following pillar: Brand Investment measures in driving Brand Equity; Brand Equity measures for Brand-Related Business Performance measures; and finally the relevance of Brand-Related Business Performance measures for driving business value.

Data Collection

Brand's ability to influence purchase depends primarily on people's perceptions. Therefore, the majority of the Brand Strength Index is derived from Brand Finance's proprietary Global Brand Equity Research Monitor research, a quantitative study of a sample of over 100,000 people from the general public on their perceptions of over 4,000 brands in over 25 sectors and 37 countries.

However, at Brand Finance we also believe that there are other measures that can be used to fill gaps that survey research may not capture. These include total investment levels – for example in marketing, R&D, innovation expenditure, that can be a better guide to future performance than surveys. They also include online measures – such as ratings by review sites and social media engagement that can give a more granular understanding of marketing effectiveness. Finally they also include real behaviour – for example net additions, customer churn and market share, to overcome the tendency for surveys to incorporate intended behaviour rather than real.

Over a period of 3 to 4 months each year, we collect all this data across all the brands in our study in order to accurately measure their comparative strength.

2



3 Benchmarking and Final Scoring

In order to convert raw data in to scores out of 10 that are comparable between attributes within the scorecard, we then have to benchmark each attribute. We do this by reviewing the distribution of the underlying data and creating a floor and ceiling based on that distribution.













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.













Global Brand Equity Monitor.

Original market research in 38 countries and across more than 31 sectors with approximately 150,000 consumers rating over 5,000 brands.

Tier 1

-  Apparel
-  Automobiles
-  Luxury Automobiles
-  Banks
-  Cosmetics & Personal Care
-  Food
-  Insurance
-  Oil & Gas
-  Restaurants
-  Retail & E-Commerce
-  Telecoms
-  Utilities

Tier 2

-  Airlines
-  Luxury Apparel
-  Appliances
-  Beers
-  Luxury Cosmetics
-  General Retail
-  Healthcare Services
-  Hotels
-  Household Products
-  Logistics
-  Media
-  Pharma
-  Real Estate
-  Soft Drinks
-  Spirits & Wine
-  Technology
-  Tyres



Brand KPIs and Diagnostics

1. Brand Funnel



Awareness

Have heard of your brand

Familiarity

Know something about your brand

Consideration

Would consider buying/using your brand

2. Brand Usage

3. Quality

4. Reputation

5. Loyalty

6. Closeness

7. Recommendation (NPS)

8. Word of Mouth

9. Brand Imagery

10. Advertising Awareness

11. Brand Momentum

Highlights from the Global Brand Equity Monitor.

Brand Finance's proprietary market research provides a robust assessment of brand health on key equity measures, allowing comparison both within and across product and service categories. Benchmarking against brands outside your sector is especially helpful in assessing the real strength of brand – not just the 'best of a bad bunch' in a category where brands are generally weaker.

What makes a brand great?

Amazon is undoubtedly one of the world's strongest brands, one of just a handful achieving the highest AAA+ rating. It has an extremely strong brand funnel, with near-universal familiarity, and consideration, and while its reputation score is not best-in-class, it is stronger than many of its critics might think.

Every strong brand has its own winning formula, and our research highlights Amazon's particular advantages. Top of that list is the outstanding value which shoppers believe Amazon delivers. Amazon ranks on this measure in big markets such as Brazil, USA, UK, and is #1 among retailers in many more. Value has always been a big driver of consumer behaviour, but Amazon also delivers a slick shopping experience ("excellent website/apps"), and this powerful combination is irresistible for many consumers, even those who question Amazon's values and broader corporate reputation.


Does brand purpose deliver?

Argument rages among CMOs and marketing gurus over this issue. The jury is out – our data suggests that being seen to "care about the wider community" does correlate somewhat with higher Consideration levels, and is an asset particularly for local favourites such as **Jio** (India) or **Bunnings** (Australia). But brands like **McDonald's** and **Nike** (as well as Amazon) are liked and desired despite somewhat moderate reputations on sustainability and values.

Who's the coolest cat?

In categories like apparel, tech and automotive, sustainability can make you cool, but it's not the only way. **Porsche** wins relatively few plaudits for sustainability, but its übercoolness is very apparent.

Selected Rankings for Amazon – All Non-Luxury Brands

	Great value for money	Excellent website/apps
	5	5
	1	1
	8	1
	6	1

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43% Care about the wider community (Rank #1)

88% Consideration Conversion



8% Care about the wider community (Rank #86)

92% Consideration Conversion

Similarly in the apparel category (especially footwear), the correlation between coolness and sustainability is not especially high.

Meanwhile in France, the epitome of chic, the 2nd-highest highest scorer among non-luxury brands is... **Burger King**.









Get your brand talked-about

Cool brands get talked about, and word-of-mouth (WOM) is another key asset some brands possess. It has proven impact on brand growth, hence WOM’s inclusion in our Brand Strength Index model.

In an absolute sense, big brands get talked about a lot more than small ones – their sheer mass presence and relevance ensures that. But deeper analysis reveals a number of challenger brands who look set to profit from above-expectation WOM levels and positive consumer sentiment. Keep an eye on **Tim Horton’s** in Spain, **Peros Garment Factory** (Canada), **SAIC** in, yes, the USA and **iinet** in Singapore.



Top-ranked brands for being “Cool” (Among Category Users) © Brand Finance Plc 2023

	1 st	2 nd	3 rd
	  PORSCHE	Jeep	
	 		
	  CONVERSE		 PORSCHE
	 	 PORSCHE	 UNDER ARMOUR

Our Services.



Consulting Services.

Make branding decisions using hard data

Brand Research

What gets measured

Brand evaluations are essential for understanding the strength of your brand against your competitors. Brand Strength is a key indicator of future brand value growth whether identifying the drivers of value or avoiding the areas of weakness, measuring your brand is the only way to manage it effectively.

- + Brand Audits
- + Primary Research
- + Syndicated Studies
- + Brand Scorecards
- + Brand Drivers & Conjoint Analysis
- + Soft Power

- + Are we building our brands' strength effectively?
- + How do I track and develop my brand equity?
- + How strong are my competitors' brands?
- + Are there any holes in my existing brand tracker?
- + What do different stakeholders think of my brand?



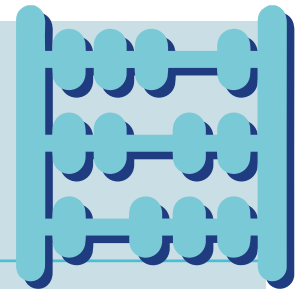
Brand Valuation

Make your brand's business case

Brand valuations are used for a variety of purposes, including tax, finance, and marketing. Being the interpreter between the language of marketers and finance teams they provide structure for both to work together to maximise returns.

- + Brand Impact Analysis
- + Tax & Transfer Pricing
- + Litigation Support
- + M&A Due Diligence
- + Fair Value Exercises
- + Investor Reporting

- + How much is my brand worth?
- + How much should I invest in marketing?
- + How much damage does brand misuse cause?
- + Am I tax compliant with the latest transfer pricing?
- + How do I unlock value in a brand acquisition?



Brand Strategy

Make branding decisions with your eyes wide open

Once you understand the value of your brand, you can use it as tool to understand the business impacts of strategic branding decisions in terms of real financial returns.

- + Brand Positioning
- + Brand Architecture
- + Franchising & Licensing
- + Brand Transition
- + Marketing Mix Modelling
- + Sponsorship Strategy

- + Which brand positioning do customers value most?
- + What are our best brand extension opportunities in other categories and markets?
- + Am I licensing my brand effectively?
- + Have I fully optimised my brand portfolio?
- + Am I carrying dead weight?
- + Should I transfer my brand immediately?
- + Is a Masterbrand strategy the right choice for my business?



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.

Brand Dialogue®



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 and marketing activations, to deliver strategic campaigns, helping us to establish and sustain strong client relationships. We also have a specific focus on geographic branding, including supporting nation brands and brands with a geographical indication (GI).

Brand Dialogue Limited is a member of the Brand Finance Plc Group



Research, Strategy & Measurement

- Brand & Communications Strategy
- Campaign Planning
- Market Research & Insights
- Media Analysis



Public Relations & Communications

- Media Relations
- Press Trips & Events
- Strategic Partnerships & Influencer Outreach
- Social Media Management



Marketing & Events

- Promotional Events
- Conference Management
- Native Advertising
- Retail Marketing



Content Creation

- Bespoke Publications, Blogs & Newsletters
- Press Releases
- Marketing Collateral Design
- Social Media Content



Strategic Communications

- Crisis Communications
- Brand Positioning & Reputation
- Geographic Branding
- Corporate Social Responsibility (CSR)



Brand Finance Network.

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

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