



Canada 100 2023

The annual report on the most valuable and strongest Canadian 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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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.

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Benefits



Brand Valuation Summary



Brand Strength Tracking



Royalty Rates



Cost of Capital Analysis



Customer Research Findings



Competitor Benchmarking

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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

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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 is 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.

As Canada continues to move towards a sustained and inclusive recovery, there has never been a more important time to acquire deep and actionable insights based on rigorous research and internationally recognised best practices.

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.



Alexandre St-Amour
Client Services Manager,
Brand Finance Canada

The past year has been both transitory and transformative for Canada and our brand economy. Although macroeconomic metrics have begun pointing towards a slow, but welcome recovery to pre-pandemic figures, Canadians remain uneasy about the current state and more importantly the future of our federal economy.

From a top-level view, brand value growth has slowed down, as an average, for the top 100 brands in the country, but total brand value is around 10% higher than it was last year, pointing towards a healthier state and increased confidence in Canada's recovery.

As the Bank of Canada's continued, although now paused, aggressive increases of the key interest rate have not yet fully been felt and as such reporting figures do not entirely represent the current state of the economy, it will be imperative for brand managers and their financial colleagues to continue shaking things up and innovating to create growth and dynamism in the months and years to come.

Heavily debated bills such as C-11 and C-18, regulating the digital economy, may also begin to have a knock-on effect on Canadian brands that work closely and in some cases rely on Meta and Alphabet's services and access to billions of users. The two proposed bills have evoked dramatic reactions, both for and against, and have also angered many of our colleagues across our southern border in the most important market for Canadian exports. Whether the bills will be passed in their current state is unclear, but Canada's brand economy and tech sector may take a hit as a result.

Additionally, hiking interest rates paired with inflation have left consumers with dollars that do not go as far as they did pre-pandemic. Certain brands in the banking and services sector may benefit, in terms of brand value, from higher interest rates, but consumers face a serious challenge of trying to stretch their paychecks as far as they used to and as such, certain consumer-facing sectors may suffer.

As the state of the Canadian economy remains in flux, the case for understanding the intrinsic monetary value of brand is even stronger. To financially navigate speculation, uncertainty, and risk, one must have the most complete and up-to-date toolbox. At Brand Finance, our research maps out both quantitative and qualitative attributes of your brand while giving you an extensive and holistic approach to measure returns on brand investment and the impact of strategic campaigns.

On top of our ISO certified methodology, our team of in-house experts with combined centuries' worth of industry experience will provide you with actionable insights and new perspectives to better manage your brand, grow its reach, and defend its value.

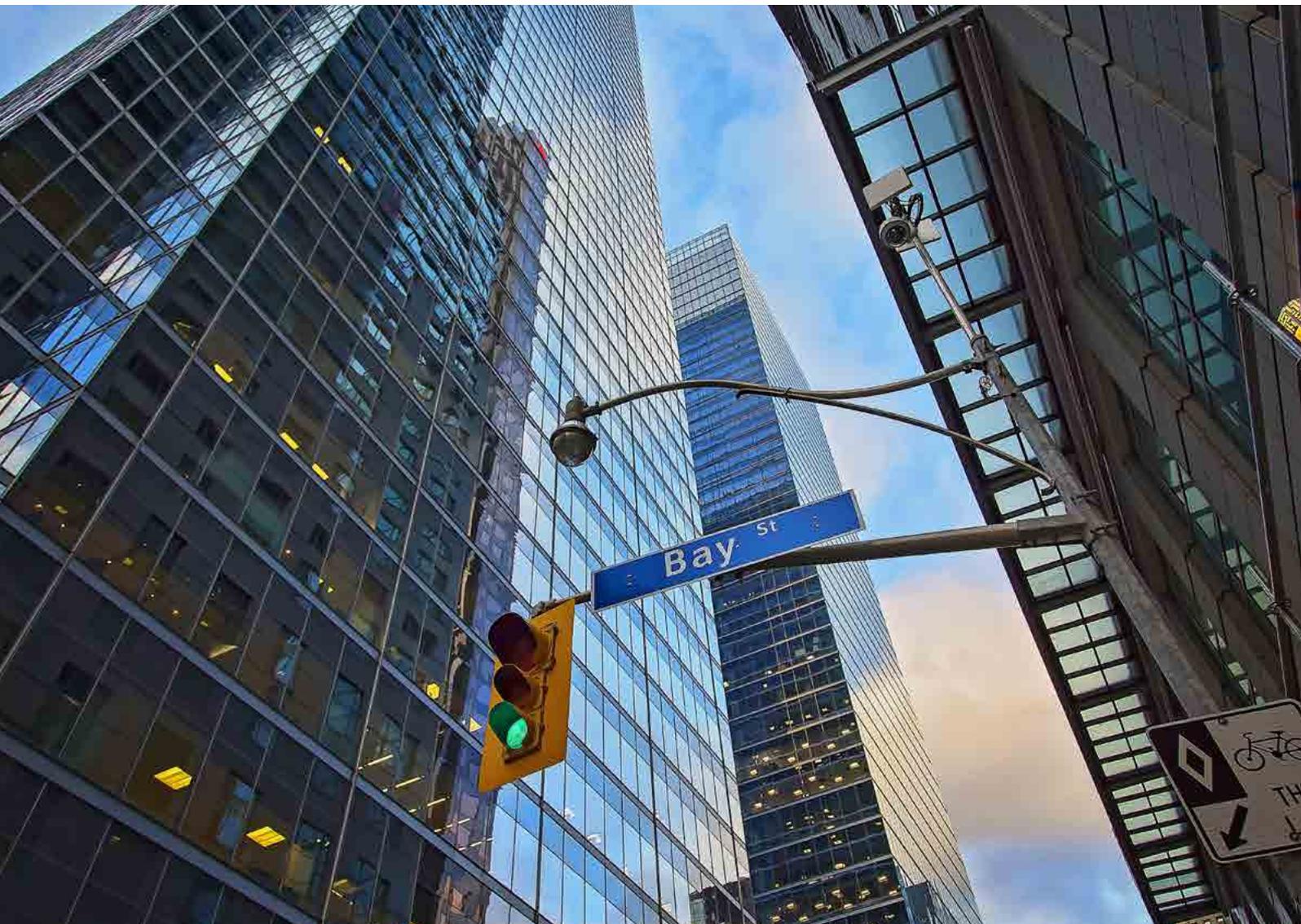
TD on the rise as it overtakes RBC to claim title as Canada's most valuable brand.

- + **TD** dethrones **RBC** as the most valuable brand in Canada
- + **Agnico Eagle** soars higher as Canadian mining & mineral brands grow
- + **Bombardier** begins recovery after having found its footing
- + **Rogers** and **Shaw** brand values slip
- + **Canadian Tech** slumps
- + **Oil & Gas** brand values still on the rise
- + **A&W** becomes the strongest Canadian brand, earning AAA rating
- + **CGI** has highest Sustainability Perceptions Score, rated 5.89 out of 10
- + **TD** has the highest Sustainability Perceptions Value at CAD1.9 billion

Ranking Analysis.



Ranking Analysis.



TD dethrones RBC as the most valuable brand in Canada

While the Canadian economy has continued to point towards uncertainty throughout the past year, **TD** (brand value up 27% to CAD27.5 billion) has remained resilient to widespread challenges and achieved impressive brand value growth.

TD's positive re-evaluation of revenues and forecasts, in comparison to last year's leader, **RBC's** (brand value down 15% to CAD19.9 billion) dampened outlook and forecasted revenues, have helped drive TD's brand value increase and allowed it to reclaim the throne as Canada's most valuable brand, a position it previously held in 2013, 2020, and 2021.

As the fifth largest bank in North America, by assets, and the most valuable brand in Canada, every move TD makes matters. In 2022, TD reiterated its commitment to its TD Ready Commitment, promising CAD1 billion of investment in Canadian communities by 2030 in four key areas: financial security, vibrant planet, connected communities and better health. Following pandemic induced economic challenges which have widely affected Canadians since 2020, the bank's brand identity as a personable institution with educational resources and a broad international reach could lead to a widening of the brand value gap between TD and its competitors in the coming years.

Top 10 Most Valuable Canadian Brands

© Brand Finance Plc 2023

<p>1 ↑ 2 </p>  <p>CAD27.5 bn +27%</p>	<p>2 ↓ 1 </p>  <p>CAD19.9 bn -15%</p>	<p>3 ← 3 </p>  <p>CAD16.1 bn +9%</p>	<p>4 ← 4 </p>  <p>CAD14.7 bn +10%</p>	<p>5 ← 5 </p>  <p>CAD14.6 bn +19%</p>
<p>6 ← 6 </p>  <p>CAD14.3 bn +29%</p>	<p>7 ↑ 9 </p>  <p>CAD12.1 bn +22%</p>	<p>8 ↓ 7 </p>  <p>CAD11.2 bn +9%</p>	<p>9 ↑ 10 </p>  <p>CAD11.0 bn +12%</p>	<p>10 ↓ 8 </p>  <p>CAD10.3 bn +2%</p>



Additionally, **TD**'s important M&A activity in the United States, paired with important investments in various real estate projects across the country, have successfully extended the TD brand and increased brand awareness and familiarity across North America.

Although a more diversified portfolio aids TD's financial security, recent news surrounding American bank **SVB**'s collapse has exposed the fragility of the banking system.

Canadian banks may be known for their conservative style which protects Canadian assets from international crises, however, increased interconnectedness between Canadian and American banking sectors will tie the fate of the Canadian economy and banking closer to that of its American neighbours'.

Agnico Eagle soars higher as Canadian Mining & Mineral brands grow

Agnico Eagle wins the title of the fastest growing Canadian brand. Its brand value has increased 115% to CAD738.8 million. Although October 2022 saw global gold prices fall, prices have more recently stabilised and continue to grow in the new year.

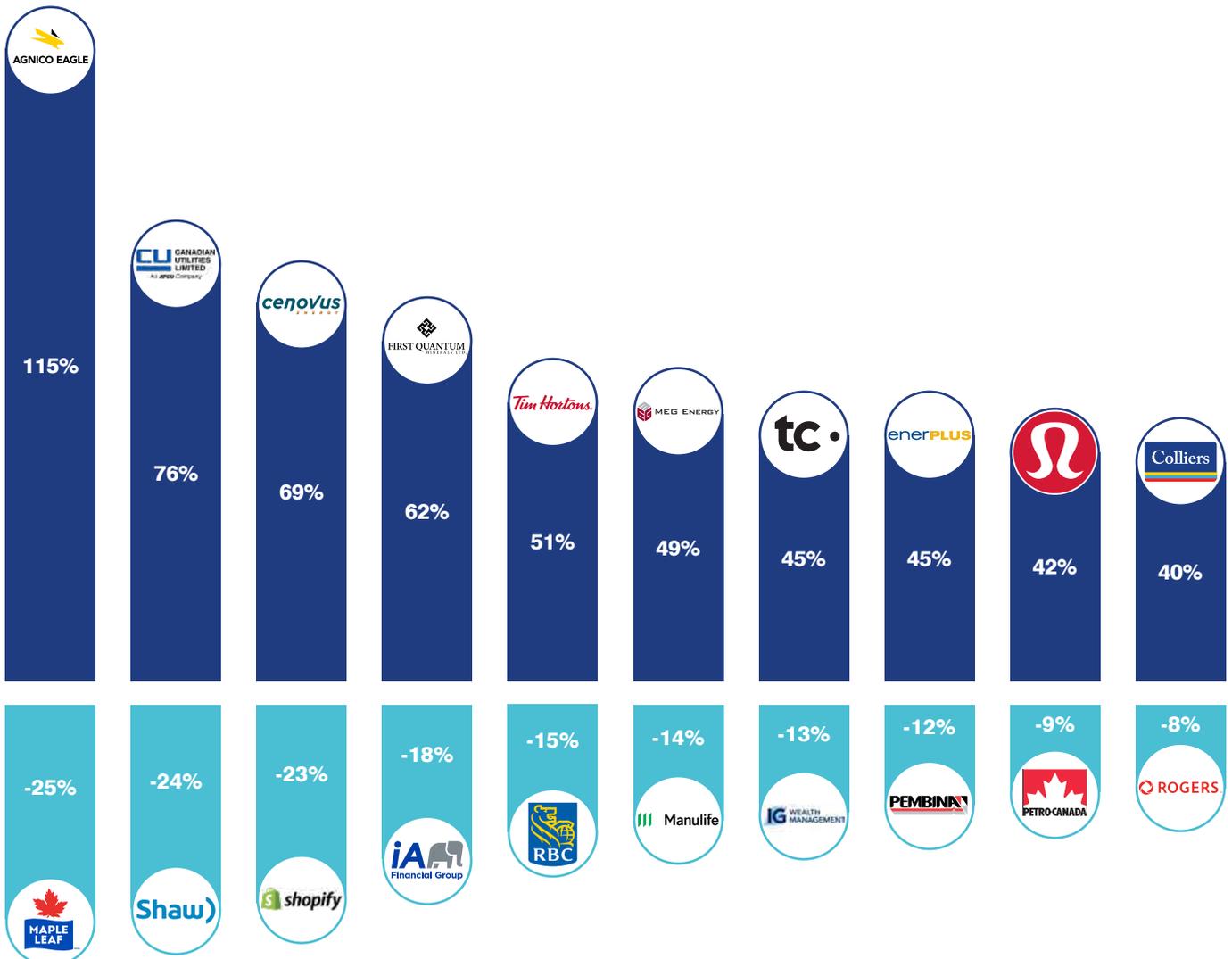
Additionally, 2022’s impressive financial performance from Canadian mining brands builds on the coat tails of an equally successful 2021. As continued supply chain disruptions command higher prices for gold and other minerals, Canadian mining brands across the

board are seeing increases in brand value, according to the Brand Finance annual Global Brand Equity Monitor study.

Although it is generally expected for industry regulations to tighten, assuming no change in government, Canadian mining brands are poised to continue to grow brand value in the next few years. A source of national pride for many Canadians, Canada’s abundant natural resources allow its mining brands to globally punch well above the weight of its population size both financially and in terms of brand value.

Brand Value Change 2022-2023 (%)

© Brand Finance Plc 2023





Bombardier begins recovery after re-finding its footing

Following difficult results in 2021, **Bombardier** is seemingly back up and running, seeing an increase of 38% in brand value to over CAD1.4 billion in 2023.

Corporate consolidation as well as moving past the sale of various business units to European and Japanese brands have allowed Bombardier to recalibrate its business focus to what it does best: high quality private aircraft.

In that vein, Bombardier has recently released the Global 8000, dubbed a “flagship for a new era”. Highly mediatised, the release of the aircraft featured a breaking of the sound barrier, showing off that Quebec-based aerospace engineering is still alive and well.

On top of the impressive release and signing of a purchase order with **NetJets**, Bombardier’s financial

metrics have improved significantly in the past year. Not only has gross margin increased over the previous year, but the brand is tracking ahead of its 2025 targets. This spectacular turnaround is also paired with important expansion of the service side of the business with new and expanded maintenance centres being invested in from London to Miami, and the UAE.

Although Bombardier has not yet reached pre-pandemic brand value levels, this last year’s growth in both financial performance and brand value points towards a full recovery and eventually a potential surpassing of its recent peak in 2019.

Rogers and Shaw brand values slip

As the controversial merger between **Rogers** and **Shaw** still awaits approval by federal regulators because of deadline push backs, both brands have taken a considerable hit to brand value and brand strength according to the 2023 edition of the Brand Finance Canada 100 Report.

Rogers (brand value down 8% to CAD6 billion) took a significant hit from the full day network outage its network experienced in mid-July. Indeed, a loss of 10 points in brand strength, according to Brand Finance research, is attributable to the loss of service by Rogers' customers and the effects this had on the wider Canadian economy, grinding Interac payments to a halt and preventing some from contacting emergency services when needed. Estimates of the effect of this outage describe that close to a quarter of the Canadian population lost access to the internet and cellular service on that day.

Shaw (brand value down 24% to CAD2.1 billion) for its part has seen its revenues continue to decline in the final quarter of 2022. Although the organisation's sale off **Freedom Mobile** to **Quebecor** this year may be seen as a sign of stress, many analysts estimate that the sale of this business unit will do nothing but aid the case of the Rogers-Shaw merger in the eyes of the necessary regulators.

The question remains whether an eventual merger between Rogers and Shaw will allow both brands to develop synergies and see both brands return to growth, or will Rogers scrap the Shaw brand entirely? There are still many questions unanswered in the case of the seemingly endless merger procedure, but both Rogers and Shaw still have a number of tricks left up their sleeve to turn the tide on this downward trend.

Impressive familiarity and awareness metrics for both brands allow them a platform to communicate their brand message clearly and tactically, but it has still yet to be seen whether the network outage will have long lasting effects on the Rogers business.

Canadian Tech slumps

Although **Shopify** continues to dominate the e-commerce space and open small and medium businesses to global consumers, adaptive business insights, and management tools, the Ottawa-based giant saw slightly over 23% of its brand value wiped off, bringing the brand to a value of CAD1.1 billion.

As a result of lower forecasts, Shopify's stock price has recently dropped in value, leading to a drop in both brand strength and value according to original Brand Finance market research and analysis.

Unmet expectations in terms of growth and weak EBIT margins have also contributed negatively to the brand's value.

This slump in the value of many tech brands is not unique to Canada, as both brand values and stock prices for many brands across the industry have been brought down. Whether this is a result of previous enterprise valuations being perceived today as overinflated or whether the expectation of continued aggressive growth at any price is now seen as unrealistic is unclear.

However, it is expected that the drop in brand value for **Shopify** as well as other Canadian tech brands such as **OpenText** (brand value down 1% to CAD2.1 billion) will stabilise shortly and expose perhaps more realistic and less speculation-based enterprise values in the tech sector both in Canada and abroad.

Oil & Gas brand values still on the rise

Excluding **Pembina Pipeline** (brand value down 12% to CAD718.5 million) and Canadian household name **Petro-Canada** (brand value down 9% to CAD1.9 billion), 2023 has been an impressively successful year for Oil & Gas brands in Canada. Thanks, in part, to the continued conflict in Ukraine and tensions between the United States and Gulf states, oil prices, although lower than their pandemic peak, remain relatively high.

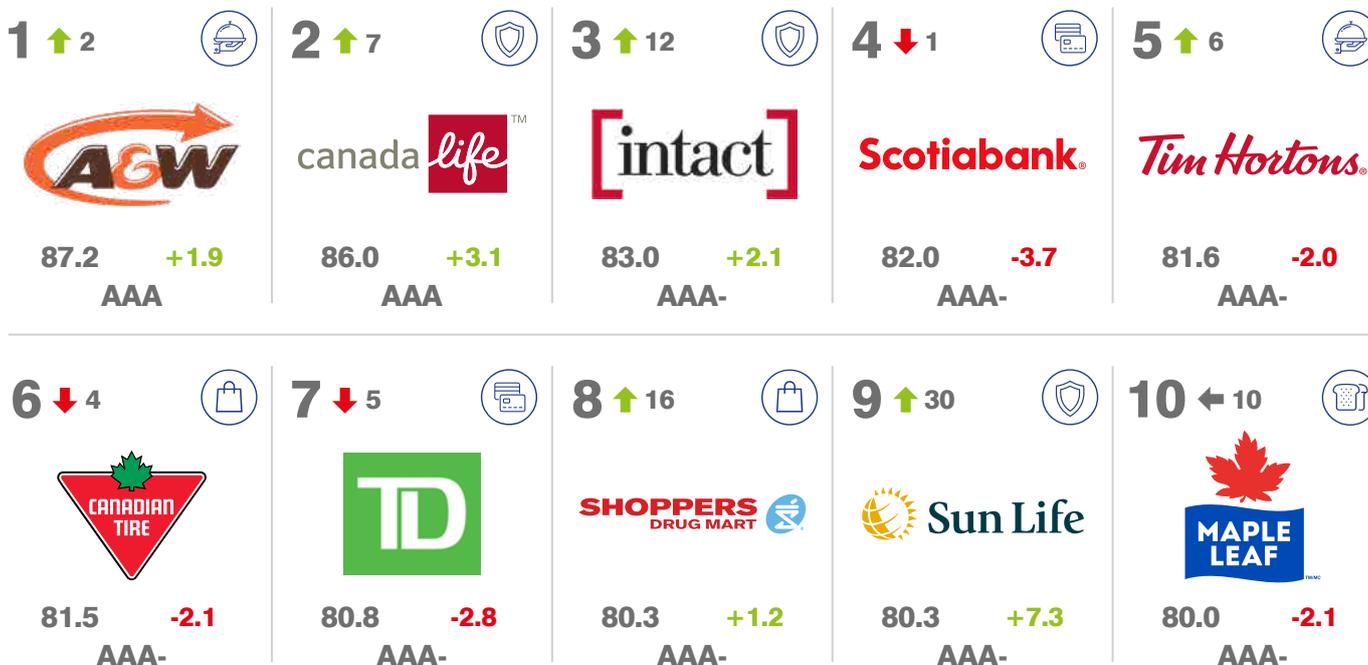
This has directly benefitted Canadian brands which, on average, see higher labour costs, regulatory pressures and increased complexity of extraction in comparison to their international competitors. As a result of this, higher revenues and forecasts have permitted brand values to go up for many Canadian Oil & Gas brands by double digits.

Cenovus (brand value up 69% to CAD3.1 billion) is the fastest growing Oil & Gas brand in Canada, augmenting the value of its brand by over a billion dollars. Although Cenovus recently sold off **Husky's** retail business, following an amalgamation in 2021, revenue forecasts nearly tripled over five years.

MEG Energy (brand value up 49% to CAD521.8 million) has re-entered the top 100 Canadian ranking, following a number of years out.

Top 10 Strongest Canadian Brands

© Brand Finance Plc 2023



Higher revenues, paired with increases in various brand strength metrics, have meant the Calgary-based brand has re-entered the ranking at a respectable 95th.

Although Canadian Oil & Gas brands have had a good year in terms of brand value, demand for transition fuels such as natural gas or LNGs have also been fuelling the industry and encouraging further exploration, discoveries, and innovation. These developments are leaving room for large brands to further increase brand value or for new entrants to find their footing and work their way up the ranking.

A&W becomes the strongest Canadian brand, earning AAA rating

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 100,000 respondents in 38 countries and across 31 sectors.

Fast-food restaurant chain, **A&W** (brand value down 2% to CAD647.3 million), has become Canada's

strongest brand with a Brand Strength Index score of 87 out of 100, with a corresponding AAA rating.

This is a 2-point year-on-year increase and means that it has overtaken last year's strongest brand, **Scotiabank** (brand value up 9% to CAD16.1 billion), which now sits in fourth with a Brand Strength Index score of 82/100. **Canada Life** (brand value up 10% to CAD14.7 billion) has also risen 5 places to become Canada's second strongest brand with a Brand Strength Index score of 86/100.

A&W now has over 1,025 restaurants across North-America and is the second largest hamburger restaurant chain in Canada and one of Canada's leading franchisors. This has allowed it to sustain a high-level awareness and familiarity amongst Canadian consumers.

While still in a post-pandemic recovery stage, A&W has looked to focus on its key initiatives of developing its digital offerings and increasing the efficiency of its customer service. Its position at the top of the ranking for brand strength suggests that the fast-food chain is succeeding in building a strong level of brand equity, which may further aid its recovery and see it return to brand value growth in the coming years.

Top 10 Highest Canadian Sustainability Perception Score (SPS) © Brand Finance Plc 2023

<p>1</p>  <p>5.89</p>	<p>2</p>  <p>5.03</p>	<p>3</p>  <p>5.03</p>	<p>4</p>  <p>5.02</p>	<p>5</p>  <p>4.98</p>
<p>6</p>  <p>4.96</p>	<p>7</p>  <p>4.85</p>	<p>8</p>  <p>4.72</p>	<p>9</p>  <p>4.71</p>	<p>10</p>  <p>4.70</p>

CGI has highest Sustainability Perceptions Score, rated 5.89 out of 10

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.

IT Services company, **CGI** (brand value down 5% to CAD4.2 billion), has the highest Sustainability Perceptions Score of any brand included in the Canada 100 ranking - 5.89 out of 10. CGI has increasingly integrated sustainability into its core business practices across its operations through a clear environmental strategy and by engaging in more energy efficient practices.

In 2022, CGI partnered with the COP27 Presidency at the United Nations Climate Change Conference in Egypt. This included discussions about CGI’s sustainability services and solutions, including making use of the metaverse, to promote how technology can play a vital role in helping organisations use data to advance climate change goals, while also achieve

long-term stakeholder value. CGI also remains on track to achieve its goal of net-zero by 2030 target, highlighting that the brand is successfully upholding its climate commitments.

TD has the highest Sustainability Perceptions Value at CAD1.9 billion

TD has the highest sustainability perceptions value of any Canadian brand, CAD1.9 billion. As Canada’s most valuable brand, TD has considerable scope for impact due to the scale of its operations. It is important to note that TD’s position at the top of the table is not an assessment of its overall sustainability performance. Instead, it highlights the value that TD has tied up in the sustainability perception of stakeholders.

TD has continued to communicate its commitment to the transition towards a lower carbon economy throughout the last year, providing customers with green banking choices and enabling responsible financing and investing. For example, the bank is helping protect and enhance forest habitat and urban green areas through collaborations with environmental and community organisations. It is also accelerating its online-banking offering to reduce paper use through online bill payment, online statements, and envelope-free cheque deposits. 100% of TD’s ATMs are now also powered by renewable energy.

Top 10 Highest Canadian Sustainability Perception Values (SPV) © Brand Finance Plc 2023

1		2		3		4		5	
	CAD1,858 m		CAD1,405 m		CAD1,345 m		CAD1,273 m		CAD1,159 m
6		7		8		9		10	
	CAD944 m		CAD884 m		CAD835 m		CAD752 m		CAD740 m



Brand Value Ranking (CADm).

Top 100 most valuable Canadian brands 1-50

2023 Rank	2022 Rank		Brand	Sector	2023 Brand Value	Brand Value Change	2022 Brand Value	2023 Brand Rating	2022 Brand Rating
1	2	↑	TD	Banking	\$27,547	+27.2%	\$21,664	AAA-	AAA-
2	1	↓	RBC	Banking	\$19,902	-15.5%	\$23,553	AA+	AAA-
3	3	←	Scotiabank	Banking	\$16,132	+9.3%	\$14,754	AAA-	AAA
4	4	←	Canada Life	Insurance	\$14,663	+9.8%	\$13,355	AAA	AAA-
5	5	←	BMO	Banking	\$14,622	+18.9%	\$12,298	AA	AA+
6	6	←	Circle K	Retail	\$14,303	+28.5%	\$11,130	A+	A+
7	9	↑	Brookfield	Banking	\$12,098	+22.0%	\$9,920	AA-	AA-
8	7	↓	CIBC	Banking	\$11,184	+8.7%	\$10,288	AA+	AAA-
9	10	↑	Bell	Telecoms	\$11,049	+11.9%	\$9,877	AA	AA
10	8	↓	Telus	Telecoms	\$10,326	+1.9%	\$10,136	AA+	AAA-
11	15	↑	Tim Hortons	Restaurants	█	█	█	█	█
12	12	←	CNRL	Oil & Gas	█	█	█	█	█
13	11	↓	Manulife	Insurance	█	█	█	█	█
14	17	↑	Lululemon	Apparel	█	█	█	█	█
15	14	↓	McCain	Food	█	█	█	█	█
16	13	↓	Rogers	Telecoms	█	█	█	█	█
17	16	↓	Enbridge	Oil & Gas	█	█	█	█	█
18	21	↑	Canadian Tire	Retail	█	█	█	█	█
19	18	↓	Sun Life	Insurance	█	█	█	█	█
20	22	↑	Thomson Reuters	Media	█	█	█	█	█
21	20	↓	Canadian National	Logistics	█	█	█	█	█
22	19	↓	Constellation Software	Tech	█	█	█	█	█
23	24	↑	Desjardins	Banking	█	█	█	█	█
24	23	↓	CGI	Tech	█	█	█	█	█
25	27	↑	Suncor Energy	Oil & Gas	█	█	█	█	█
26	26	←	Shoppers Drug Mart	Retail	█	█	█	█	█
27	30	↑	Loblaws	Retail	█	█	█	█	█
28	25	↓	Magna	Auto Components	█	█	█	█	█
29	28	↓	Air Canada	Airlines	█	█	█	█	█
30	29	↓	National Bank of Canada	Banking	█	█	█	█	█
31	43	↑	Cenovus	Oil & Gas	█	█	█	█	█
32	38	↑	Nutrien	Chemicals	█	█	█	█	█
33	32	↓	CP	Logistics	█	█	█	█	█
34	33	↓	Real Canadian Superstore	Retail	█	█	█	█	█
35	34	↓	Intact	Insurance	█	█	█	█	█
36	37	↑	Dollarama	Retail	█	█	█	█	█
37	41	↑	Gildan	Apparel	█	█	█	█	█
38	36	↓	Crown Royal	Spirits	█	█	█	█	█
39	39	←	OpenText	Tech	█	█	█	█	█
40	31	↓	Shaw	Telecoms	█	█	█	█	█
41	42	↑	Metro	Retail	█	█	█	█	█
42	44	↑	BRP	Leisure & Tourism	█	█	█	█	█
43	35	↓	iA Financial Group	Insurance	█	█	█	█	█
44	40	↓	Petro-Canada	Oil & Gas	█	█	█	█	█
45	45	←	TC Energy	Oil & Gas	█	█	█	█	█
46	51	↑	Winners	Retail	█	█	█	█	█
47	49	↑	Imperial Oil	Oil & Gas	█	█	█	█	█
48	52	↑	Parkland	Oil & Gas	█	█	█	█	█
49	46	↓	Canada Goose	Apparel	█	█	█	█	█
50	47	↓	Vidéotron	Telecoms	█	█	█	█	█

Top 100 most valuable Canadian brands 51-100

2023 Rank	2022 Rank		Brand	Sector	2023 Brand Value	Brand Value Change	2022 Brand Value	2023 Brand Rating	2022 Brand Rating
51	48	↓	Fortis	Utilities	🔒	🔒	🔒	🔒	🔒
52	57	↑	Bombardier	Aerospace & Defence	🔒	🔒	🔒	🔒	🔒
53	56	↑	Dairyland	Food	🔒	🔒	🔒	🔒	🔒
54	54	↔	Barrick Gold	Mining, Metals & Minerals	🔒	🔒	🔒	🔒	🔒
55	55	↔	Cogeco	Telecoms	🔒	🔒	🔒	🔒	🔒
56	58	↑	Neilson	Food	🔒	🔒	🔒	🔒	🔒
57	50	↓	Shopify	Tech	🔒	🔒	🔒	🔒	🔒
58	-	New	West Fraser Timber	Engineering & Construction	🔒	🔒	🔒	🔒	🔒
59	60	↑	Rona	Retail	🔒	🔒	🔒	🔒	🔒
60	61	↑	Teck	Mining, Metals & Minerals	🔒	🔒	🔒	🔒	🔒
61	59	↓	WSP Global	Engineering & Construction	🔒	🔒	🔒	🔒	🔒
62	65	↑	Hydro One	Utilities	🔒	🔒	🔒	🔒	🔒
63	62	↓	Jean Coutu	Retail	🔒	🔒	🔒	🔒	🔒
64	83	↑	First Quantum Minerals	Mining, Metals & Minerals	🔒	🔒	🔒	🔒	🔒
65	67	↑	Wholesale Club	Retail	🔒	🔒	🔒	🔒	🔒
66	77	↑	Crescent Point	Oil & Gas	🔒	🔒	🔒	🔒	🔒
67	80	↑	Schneiders	Food	🔒	🔒	🔒	🔒	🔒
68	69	↑	Finning	Engineering & Construction	🔒	🔒	🔒	🔒	🔒
69	73	↑	Sobeys	Retail	🔒	🔒	🔒	🔒	🔒
70	66	↓	Toromont	Engineering & Construction	🔒	🔒	🔒	🔒	🔒
71	85	↑	Colliers	Real Estate	🔒	🔒	🔒	🔒	🔒
72	75	↑	Safeway (Canada)	Retail	🔒	🔒	🔒	🔒	🔒
73	-	New	Agnico Eagle	Mining, Metals & Minerals	🔒	🔒	🔒	🔒	🔒
74	88	↑	Enerplus	Oil & Gas	🔒	🔒	🔒	🔒	🔒
75	-	New	Linamar	Auto Components	🔒	🔒	🔒	🔒	🔒
76	63	↓	Pembina Pipeline	Oil & Gas	🔒	🔒	🔒	🔒	🔒
77	76	↓	CAE	Aerospace & Defence	🔒	🔒	🔒	🔒	🔒
78	81	↑	Natrel	Food	🔒	🔒	🔒	🔒	🔒
79	82	↑	Northbridge Insurance	Insurance	🔒	🔒	🔒	🔒	🔒
80	86	↑	Sport Chek	Retail	🔒	🔒	🔒	🔒	🔒
81	70	↓	Emera	Utilities	🔒	🔒	🔒	🔒	🔒
82	74	↓	A&W	Restaurants	🔒	🔒	🔒	🔒	🔒
83	97	↑	ARITZIA	Retail	🔒	🔒	🔒	🔒	🔒
84	68	↓	IG Wealth Management	Banking	🔒	🔒	🔒	🔒	🔒
85	64	↓	Maple Leaf Foods	Food	🔒	🔒	🔒	🔒	🔒
86	96	↑	Canada Dry	Soft Drinks	🔒	🔒	🔒	🔒	🔒
87	95	↑	Stantec	Commercial Services	🔒	🔒	🔒	🔒	🔒
88	78	↓	Super C	Retail	🔒	🔒	🔒	🔒	🔒
89	92	↑	Foodland (Canada)	Retail	🔒	🔒	🔒	🔒	🔒
90	87	↓	CI Financial	Banking	🔒	🔒	🔒	🔒	🔒
91	94	↑	eOne	Media	🔒	🔒	🔒	🔒	🔒
92	90	↓	Canada Post	Logistics	🔒	🔒	🔒	🔒	🔒
93	98	↑	Couche-Tard	Retail	🔒	🔒	🔒	🔒	🔒
94	89	↓	Sealtest (Canada)	Food	🔒	🔒	🔒	🔒	🔒
95	-	New	MEG Energy	Oil & Gas	🔒	🔒	🔒	🔒	🔒
96	-	New	Canadian Utilities	Utilities	🔒	🔒	🔒	🔒	🔒
97	-	New	Transcontinental	Commercial Services	🔒	🔒	🔒	🔒	🔒
98	93	↓	Cineplex	Media	🔒	🔒	🔒	🔒	🔒
99	100	↑	Baytex	Oil & Gas	🔒	🔒	🔒	🔒	🔒
100	-	New	TMX	Exchanges	🔒	🔒	🔒	🔒	🔒

Brand Spotlights.





Rank

1 ↑

Brand Value

CAD27.5 bn
+27.2%

Rank

7

Brand Strength

80.8

Interview with Betsey Chung.



Betsey Chung
Executive Vice President,
Global Chief Marketing
Officer

As a brand in an industry with a small number of large established corporations, how does one ensure that the TD brand message gets across to consumers without possible brand attribution to a competitor?

What's helped us excel at amplifying our message has been our clear focus on being a brand with purpose. From our CEO to every one of our colleagues, TD operates as a customer-centric organization that responds to the needs of our customers, whatever they may be. This clarity of purpose allows us to confidently show consumers what differentiates us from other businesses – and why we are the better bank. We leverage art and science to deliver memorable, personalized experiences and drive positive impact for our customers, colleagues, and communities. For instance, the music we use in our spots is always unconventionally delightful. We apply our sophisticated digital marketing practice to drive traffic and interest. Most recently, we've been looking to Generative AI as a springboard to stronger ideas and enhanced efficiency. The marketing decisions we make are all data driven. This approach, combined with our clearly defined tone of voice and compelling proof points, has helped us consistently rank as the top financial institution in Share of Voice in Canada.

TD's brand image brings vibrancy and dynamism to a traditionally sober industry. What drives this differentiation and how is its success measured?

We're an organization that isn't afraid to be different – and we have a long history of doing this. From being open for longer, to being unexpectedly authentic and human, to our 'TD Thanks You' campaign – we make it our mission to reflect the communities we serve. This shows up in the way we operate. A number of leaders across the organization, including myself, begin every meeting with a customer story. And with each of those stories – we discuss the customer concern, how it was resolved, and the role we play in Marketing to address those issues. When you pair that level of organizational accountability with top-tier creative talent – you're bound to build creative that is vibrant and dynamic, yet effective. Success for us is defined by our customers. That's why our focus has always been to ensure our brand lives up to customer expectations, across every interaction and touchpoint. Our brand pillars of Ease, Value, and Advice are foundational for the entire organization, and when activated with a customer-first mindset, become another powerful differentiator. Through metrics like brand consideration and accolades like the Brand Finance Canada 100, we see that our approach is working.

As a bank with various types of customers looking for several different services, how does one ensure that the core brand message is communicated evenly to all these groups despite different needs and expectations from each one?

Our research has shown that, no matter the interaction, consumers are all looking for the same thing from their financial institution – they want banking to be easy, they want value for their money, and they want advice they can trust. We find that holds true for every stage of the customer journey. Armed with these insights, we utilize our sophisticated capabilities in digital, creative and media to convey our brand promise to consumers. Our tenets of Ease, Value and Advice are also embedded into various touchpoints, including our frontline and phone channel. A great example of communicating our core brand message evenly would be the two spots we recently launched during the Canadian Superbowl broadcast – one focused on the TD Easy Trade app, and the other focused on the TD Financial Plan. The core premise of the Easy Trade spot is around customers wanting things to be easy while the TD Financial Plan spot is centered around trusted advice. Both ads serve different customer needs – but watching them – you'd come to the same conclusion: TD is ready to help you move forward.

Having donated an impressive sum through the 2022 TD Ready Challenge, how do you define TD's role in creating a more sustainable future?

At the core, sustainability, and environmental, social and governance (ESG) are about trust, community, and shared prosperity. As an organization, TD has been leading in these spaces for over 150 years. We believe we have a critical role to play across the economy and society: as a financial institution, business, corporate citizen, and employer. When it comes to sustainability and ESG, it's important for organizations to have clarity around their "why." Why is this work important? ESG is important for TD because it's through this work that we live our purpose of enriching the lives of our customers, colleagues, and communities. It also gives us the opportunity to support economic inclusion and environmental health that are fundamental to delivering on our purpose.

Inclusive growth enables a stronger future for all. We believe that when our communities thrive, we thrive. This has guided our philanthropic investments for decades. In 2022, we continued a long tradition of supporting those who are marginalized, underserved or vulnerable through the TD Ready Commitment – the Bank's corporate citizenship platform – supporting more than 3,000 community organizations and contributing over \$147 million to communities.

In June 2022, we launched the fifth annual TD Ready Challenge, a key initiative of the TD Ready Commitment, which focuses on helping to support the development of innovative, impactful, and measurable solutions for a changing world. The 2022 TD Ready Challenge sought solutions designed to help people and communities who may be disproportionately affected by climate change to prepare for, adapt to and

help mitigate the potential impacts of climate change and/or to work toward a transition to a low-carbon economy.

The 10 recipient organizations – who each received \$1 million grants – are focused on making an impact in communities across the TD footprint through initiatives that include large-scale green infrastructure projects, the development of renewable energy solutions, and workforce development/retraining opportunities, among others.

What do you believe consumers expect, if anything, from TD in terms of sustainability, and how do you deliver that?

We believe that banking serves a higher purpose and plays a critical role in our society and economy. As a bank, we help individuals and businesses realize their aspirations. As an employer, we help talented people achieve their full potential. And as a corporate citizen, we support positive change in our communities.

Our ESG strategy aligns to our purpose and guides how we live up to the expectations of our customers while connecting with the communities we serve. For us, ESG is a key strategic priority, and something that's embedded in who we are as an employer, a community partner, and financial institution. Today, we are more determined than ever to help drive meaningful outcomes for a more sustainable and inclusive economy as well as a healthier planet where everyone can thrive. As a leading global bank, we have an opportunity to support better environmental health and social outcomes through the financial products, services, and programs we offer. We will stay true to our purpose as we work to create an even better tomorrow.





Methodology.

Definitions.



Brand Value



+ Enterprise Value

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

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



+ Branded Business Value

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

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



+ Brand Contribution

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

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



+ Brand Value

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

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

Brand 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.

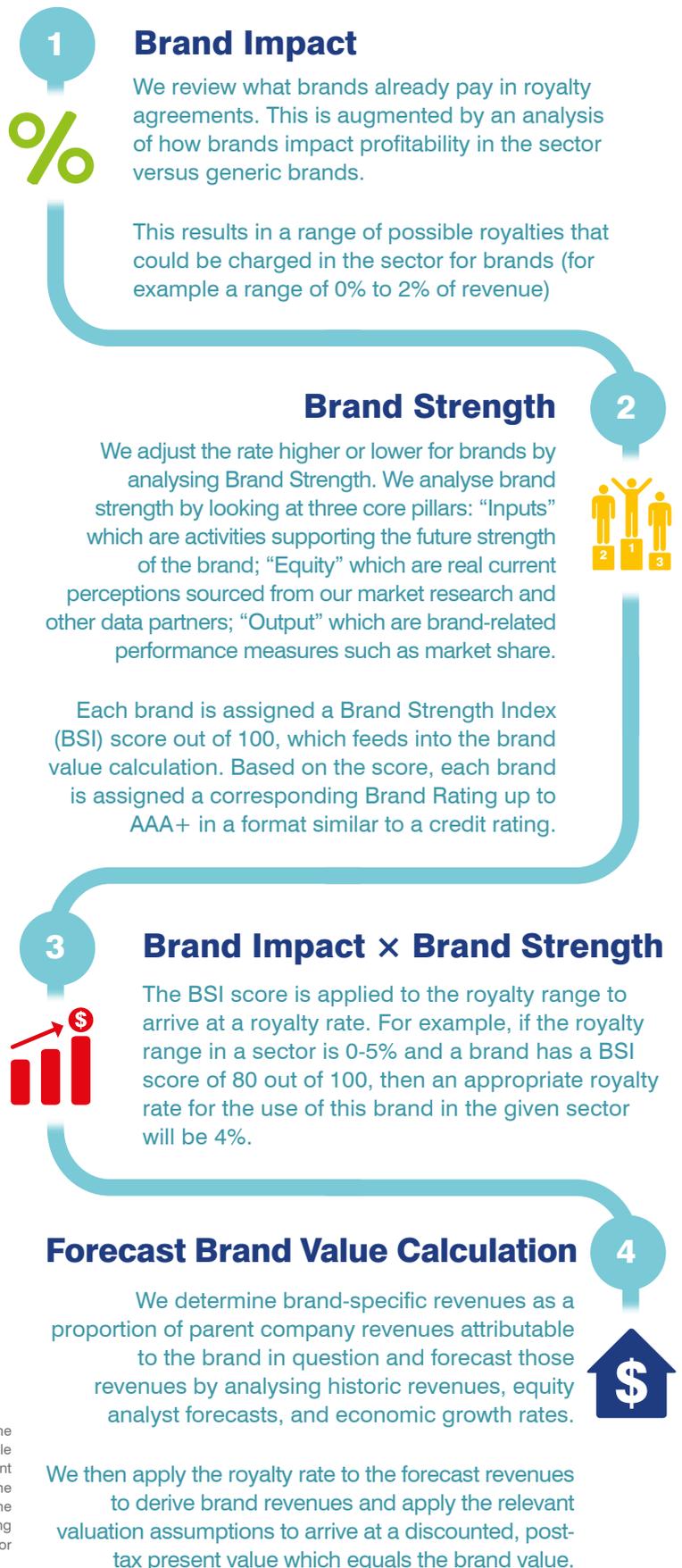
As a result, Brand Finance always incorporates a review of what users of brands actually pay for the use of brands in the form of brand royalty agreements, which are found in more or less every sector in the world.

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.



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.

2 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.



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.

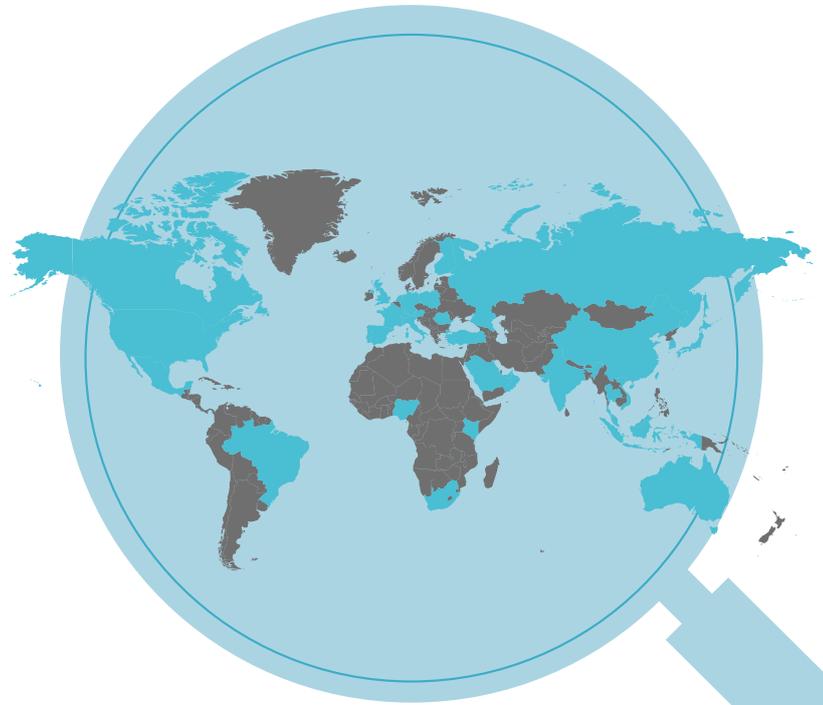
Original market research in 38 countries and across 31 sectors with over 150,000 consumers rating over 5,000 brands.

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.

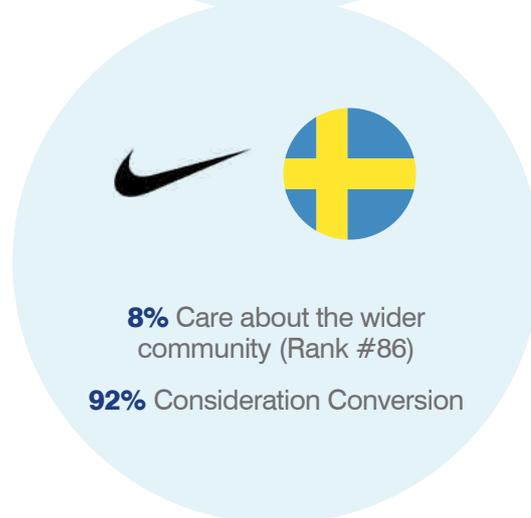
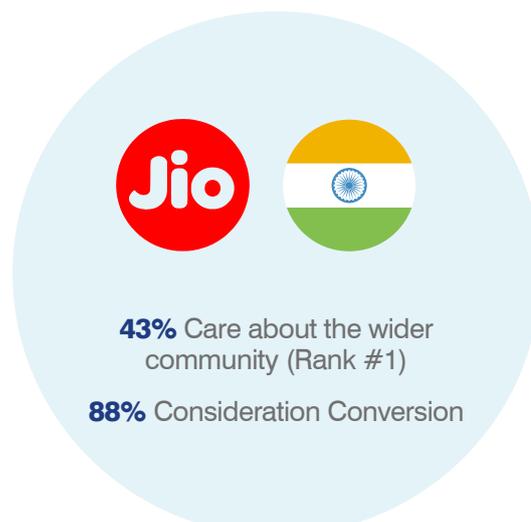
Who's the coolest cat?

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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Highlights from the Global Brand Equity Monitor.

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)

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	1 st	2 nd	3 rd
		Jeep	
	Levi's		

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



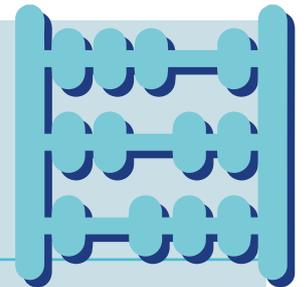
- + Are we building our brands' strength effectively?
- + How do I track and develop my brand equity?
- + How strong are my competitors' brands?
- + Are there any holes in my existing brand tracker?
- + What do different stakeholders think of my brand?

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



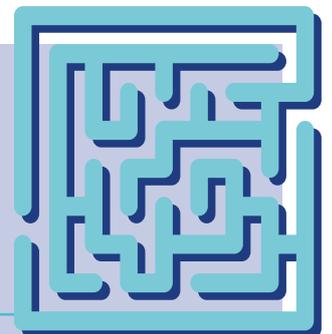
- + How much is my brand worth?
- + How much should I invest in marketing?
- + How much damage does brand misuse cause?
- + Am I tax compliant with the latest transfer pricing?
- + How do I unlock value in a brand acquisition?

Brand Strategy

Make branding decisions with your eyes wide open

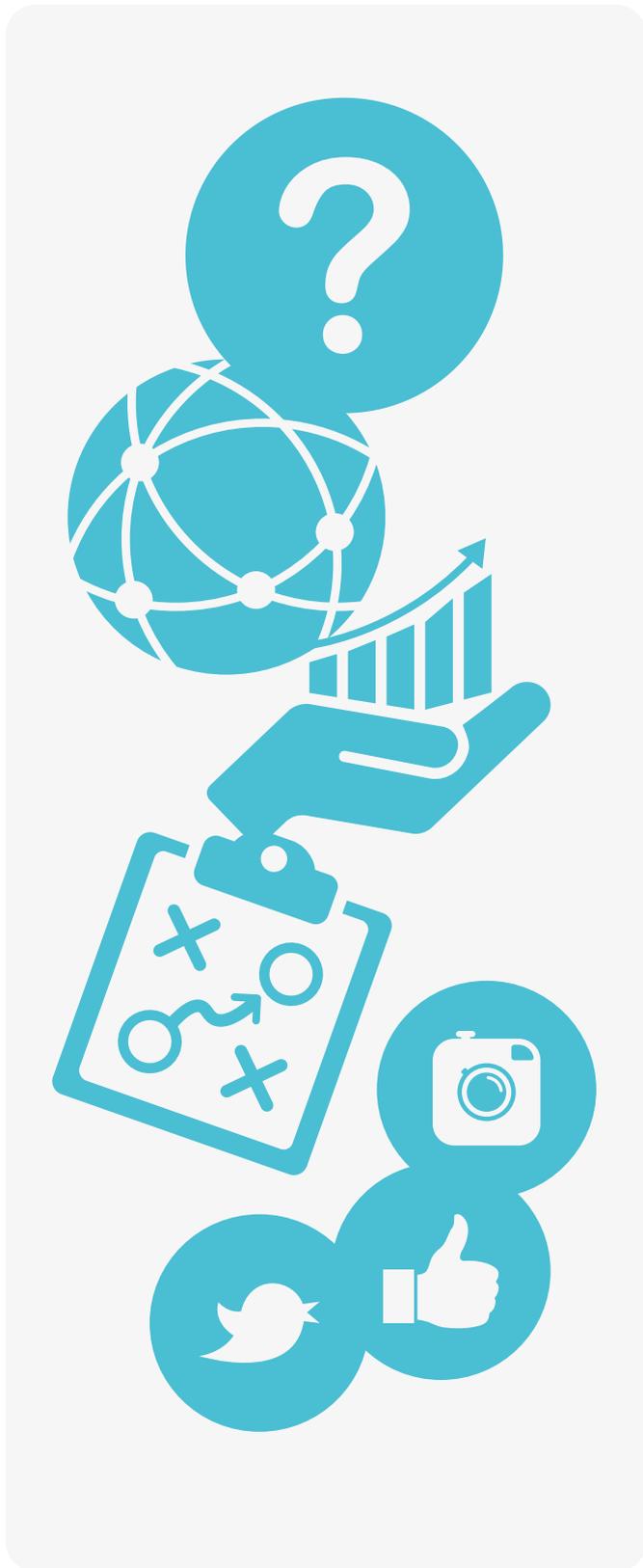
Once you understand the value of your brand, you can use it as tool to understand the business impacts of strategic branding decisions in terms of real financial returns.

- + 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.

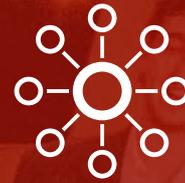
How can I improve return on marketing investment?

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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