



# Hotels

# 50

# 2022

The annual report on the most valuable and strongest hotel brands  
June 2022

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

**We offer a unique combination of expertise**

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

**We pride ourselves on technical credibility**

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

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



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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.

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Customer Research Findings



Competitor Benchmarking



Communication



Understanding

Benefits

Contents



Brand Valuation Summary



Brand Strength Tracking



Royalty Rates

# Brandirectory.com



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

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

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

## Brand Finance Group.



**Brand Finance**<sup>®</sup>  
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**<sup>®</sup>



### 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**
- **36 countries** and over **29 sectors** covered
- More than **100,000 respondents** surveyed annually
- We are now **in our 6<sup>th</sup> consecutive year** conducting the study

Visit [brandirectory.com/consumer-research](https://brandirectory.com/consumer-research)  
or email [enquiries@brandfinance.com](mailto:enquiries@brandfinance.com)



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

# Foreword.

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**David Haigh**  
Chairman & CEO,  
Brand Finance

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

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

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

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

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

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

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

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

A stack of papers is shown in a grayscale, slightly blurred perspective. A dark blue rectangular overlay is positioned in the upper left quadrant, containing the text 'Executive Summary.' in a bold, white, sans-serif font. The papers in the background are stacked and slightly offset, creating a sense of depth and volume.

# Executive Summary.



# Hilton brand value leaps ahead to retain top position, while most hotel brands remain below pre-pandemic values

- + **Hilton** brand value is up 58% to US\$12.0 billion
- + Two-thirds of top 50 hotel brands remain below pre-pandemic values
- + **Taj Hotels** is world's strongest hotels brand with AAA rating
- + The **Ritz-Carton** is world's fastest growing hotel brand, more than doubling in value this year

# Brand Value & Brand Strength Analysis.



## Hilton brand value is up 58% to US\$12.0 billion

**Hilton** (brand value up 58% to US\$12.0 billion) has extended its reign as the world's most valuable hotels brand, according to a new report from the leading brand valuation consultancy, Brand Finance. Hilton has grown its lead as the most valuable hotels brand in the world, with a brand value which is now greater than 2nd and 3rd combined: Hyatt (brand value up 26% to US\$5.9 billion) and Holiday Inn (brand value up 10% to US\$4.2 billion).

Every year, leading brand valuation consultancy Brand Finance puts 5,000 of the biggest brands to the test, and publishes around 100 reports, ranking brands across all sectors and countries. The world's top 50 most valuable and strongest hotel brands are included in the annual Brand Finance Hotels 50 2022 ranking.

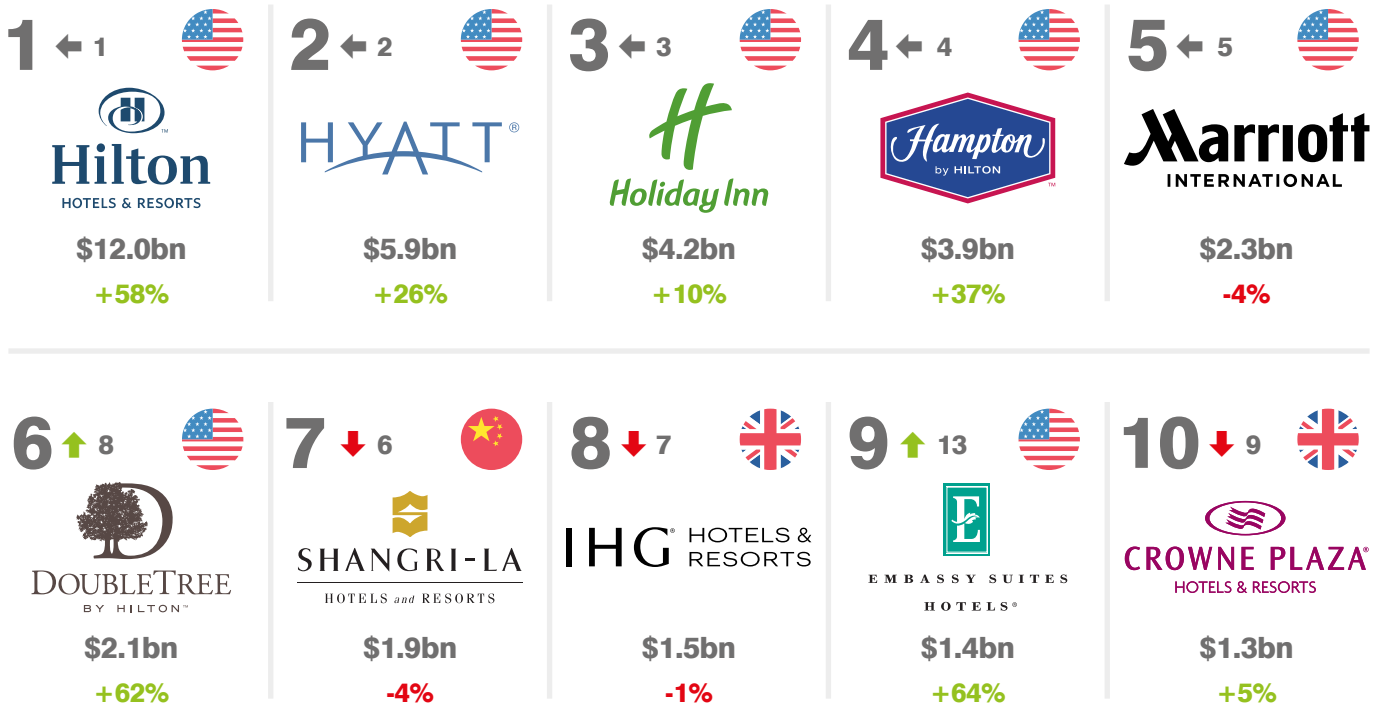
As we look to a post-pandemic world, **Hilton's** brand value increase is driven by both an increase

in forecast revenue and increased profitability expectations. At the same time, Brand Finance research discovered that customers improved their perception of **Hilton**, with the large brand's perceived reliability and credibility on safety issues being a key factor. This contributed to a 7.2 point increase on its Brand Strength Index from 80.8 to 88.0, improving its Brand Rating from AAA- to AAA and becoming the third strongest hotel brand in the world this year.

**"The global disruption to travel due to the COVID-19 pandemic caused significant disruption to brand values – but customers recognise that hotels are not to blame for the disruption. As a result, we see that successful**

Top 10 Most Valuable Hotel Brands

© Brand Finance Plc 2022



brands have been able to bounce back quickly and re-earn customer trust in the post-pandemic world."

Alex Haigh

Brand Finance Technical Director

Two-thirds of top 50 hotel brands remain below pre-pandemic values

Global travel restrictions over the last two years introduced in response to the spread of COVID-19 imposed significant and obvious costs on hotel brands, with many yet to recover: Of the 50 brands included in the Hotels 50 2022 ranking, two-thirds of the brands (34) remain below their pre-pandemic valuation of 2020, with just one-third (16) above their pre-pandemic valuation.

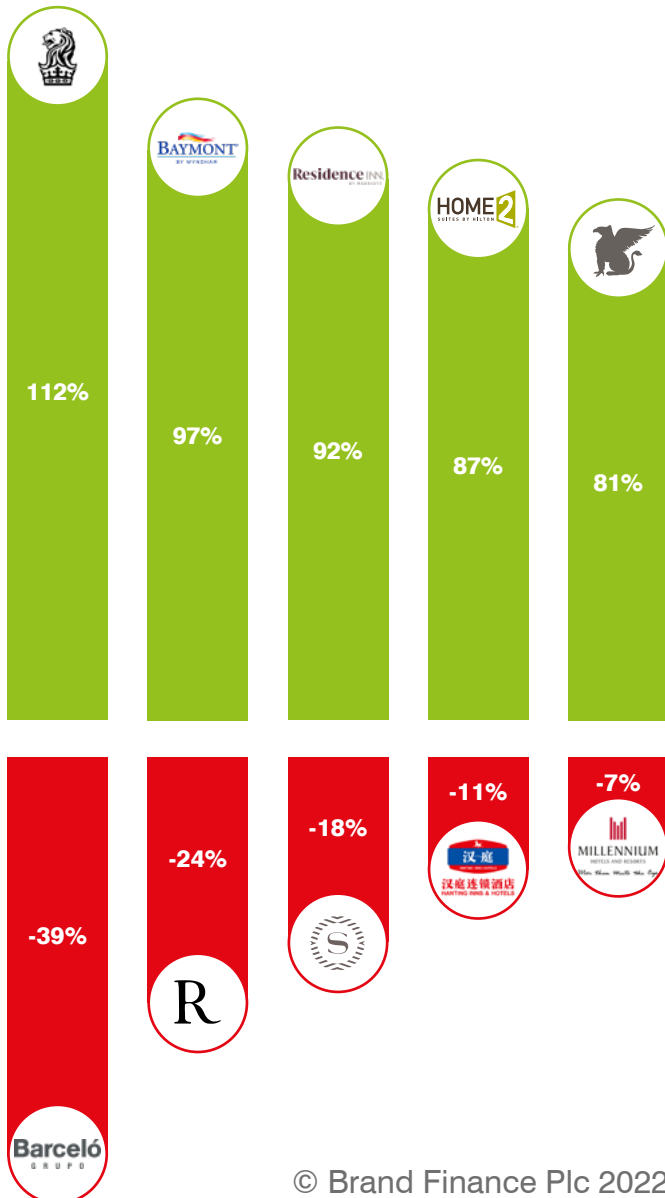
One brand to increase brand value sharply was **NH Hotels** (brand value up 47% to US\$1.0 billion) which endured significant disruption from COVID-19 generally, and the Omicron variant more specifically.

**NH Hotels** endured an occupancy rate of between 20% and 30% throughout the first half of 2021, growing throughout the year to 62% in October – before the Omicron variant played a key role in the occupancy rate falling back down to 26% in January 2022. However, with all **NH Hotels** properties now re-opened, occupancy rates have returned back over 60% more recently. These data are contributing to the **NH Hotels** brand value achieving a rate 33% higher than their pre-pandemic valuation on the back of increased revenue forecasts.

Elsewhere, the brand value of luxury hotel **Intercontinental** (brand value down 1% to US\$1.5 billion) fell marginally, with significant concerns about potential delays to the reopening of services in **Intercontinental's** key Chinese market. Despite enduring some of the toughest periods ever endured by the hospitality industry, **Intercontinental** remains focused on deliver its brand promise of deliver 'True Hospitality for Good'. This brand promise seeks to benefit customers and staff, and to also positive difference to their local communities. Their strategy includes placing a sharper focus on their brand, and offers the potential of significant future brand value growth.



Brand Value Change 2021-2022 (%)



The **Accor** group, including brands **Ibis** (brand value up 24% to US\$463 million) and **Pullman** (brand value up 20% to US\$349 million) is having a strong year, with their brand values growing significantly this year. Average room rates across the **Pullman** and **Ibis** brands returned to their pre-COVID-19 levels, and some properties even exceeded pre-COVID-19 rates. While there are some lingering consequences of COVID-19 restrictions, their hotel brands maintained significant brand value and brand strength through the pandemic, a recognition that consumers did not blame hotels for the virus.

**Taj Hotels is world’s strongest hotels brand with AAA rating**

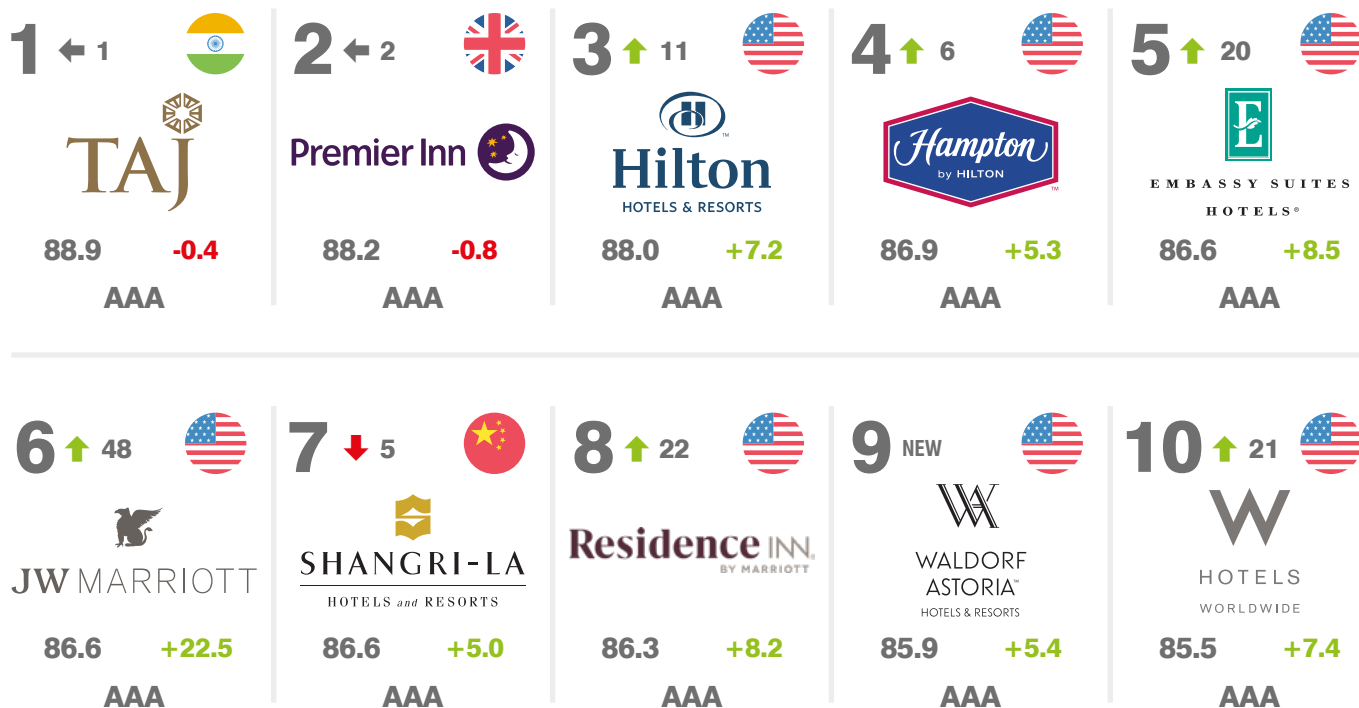
In addition to brand value, Brand Finance determines the relative strength of brands through a balanced scorecard of metrics evaluating marketing investment, stakeholder equity, and business performance. Compliant with ISO 20671, Brand Finance’s assessment of stakeholder equity incorporates original market research data from over 100,000 respondents in more than 35 countries and across nearly 30 sectors. **Taj Hotels** (brand value up 6% to US\$314 million) is the strongest brand in the ranking with a Brand Strength Index (BSI) score of 88.9 out of 100 and a corresponding AAA brand rating.

The pandemic and subsequent national lockdowns hit **Taj** like other hotels across the world, and **Taj** was able to successfully adjust strategies to remain relevant to the need of tourists. **Taj** was at the forefront of this with agility and strategic initiatives such as offering support to the healthcare sector.

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Top 10 Strongest Hotel Brands

© Brand Finance Plc 2022



**The Ritz-Carlton is world’s fastest growing hotel brand, more than doubling in value this year**

The **Ritz-Carlton** (brand value up 112% to US\$1.1 billion) is the world’s fastest growing hotel brand this year, with its brand value now 67% above its pre-pandemic value of US\$632 million. This brand value has increased based on its impressively high revenue per available room and large number of rooms. Part of the **Marriott Group**, the **Ritz-Carlton** has built an extremely strong brand, with its Brand Strength Index increasing from 79.6 to 83.2, with its brand rating now firmly in the AAA- band.

Other quickly growing brands include **Baymont** (brand value up 97% to US\$382 million) which has re-entered these rankings as it bounces back quickly from COVID. This bounce back in brand value is associated with strong trading conditions forecast for its key markets, and improved customer perception. Similarly, **Residence Inn** (brand value up 92% to US\$760 million) is the third fastest growing hotel brand, which has achieved a significant improvement in customer perception, which is leveraging a very large number of rooms and revenue per room relative to other brands.



Brand Value by Country

© Brand Finance Plc 2022



Country	Brand Value (USD bn)	% of total	Number of Brands
United States	47.1	77.4%	31
United Kingdom	4.6	7.5%	5
China	3.4	5.5%	4
France	2.2	3.6%	4
Spain	1.3	2.2%	2
Australia	0.9	1.4%	1
Other	1.5	2.4%	3
<b>Total</b>	<b>60.9</b>	<b>100.0%</b>	<b>50</b>



# Brand Value Ranking.






## Top 50 most valuable hotel brands

2022 Rank	2021 Rank		Brand	Country	2022 Brand Value	Brand Value Change	2021 Brand Value	2022 Brand Rating	2021 Brand Rating
1	1	←	Hilton	United States	\$12,040	+58.2%	\$7,610	AAA	AAA-
2	2	←	Hyatt	United States	\$5,905	+25.8%	\$4,695	AA+	AA+
3	3	←	Holiday Inn	United States	\$4,155	+10.1%	\$3,776	AAA-	AAA-
4	4	←	Hampton Inn	United States	\$3,928	+37.2%	\$2,863	AAA	AAA-
5	5	←	Marriott	United States	\$2,313	-3.9%	\$2,408	AAA-	AAA-
6	8	↑	Double Tree	United States	\$2,111	+61.9%	\$1,304	AAA	AAA-
7	6	↓	Shangri-La	China (Hong Kong)	\$1,911	-3.8%	\$1,987	AAA	AAA-
8	7	↓	Intercontinental	United Kingdom	\$1,450	-0.8%	\$1,462	AAA-	AAA-
9	13	↑	Embassy Suites	United States	\$1,437	+64.4%	\$875	AAA	AA+
10	9	↓	Crowne Plaza	United Kingdom	\$1,271	+4.7%	\$1,215	AAA-	AA+
11	19	↑	Comfort	United States	🔒	🔒	🔒	🔒	🔒
12	11	↓	Premier Inn	United Kingdom	🔒	🔒	🔒	🔒	🔒
13	26	↑	The Ritz-Carlton	United States	🔒	🔒	🔒	🔒	🔒
14	15	↑	Wyndham	United States	🔒	🔒	🔒	🔒	🔒
15	18	↑	NH Hotels	Spain	🔒	🔒	🔒	🔒	🔒
16	17	↑	Courtyard	United States	🔒	🔒	🔒	🔒	🔒
17	12	↓	Mercure	France	🔒	🔒	🔒	🔒	🔒
18	10	↓	Sheraton	United States	🔒	🔒	🔒	🔒	🔒
19	16	↓	Crown	Australia	🔒	🔒	🔒	🔒	🔒
20	24	↑	Homewood Suites	United States	🔒	🔒	🔒	🔒	🔒
21	14	↓	Westin	United States	🔒	🔒	🔒	🔒	🔒
22	27	↑	Scandic Hotels	Sweden	🔒	🔒	🔒	🔒	🔒
23	33	↑	Residence Inn	United States	🔒	🔒	🔒	🔒	🔒
24	22	↓	Quality	United States	🔒	🔒	🔒	🔒	🔒
25	29	↑	Ramada	United States	🔒	🔒	🔒	🔒	🔒
26	30	↑	La Quinta	United States	🔒	🔒	🔒	🔒	🔒
27	20	↓	Extended Stay America	United States	🔒	🔒	🔒	🔒	🔒
28	21	↓	Jinjiang	China	🔒	🔒	🔒	🔒	🔒
29	37	↑	Home2 Suites	United States	🔒	🔒	🔒	🔒	🔒
30	32	↑	Luxury Collection	United States	🔒	🔒	🔒	🔒	🔒
31	41	↑	Days Inn	United States	🔒	🔒	🔒	🔒	🔒
32	35	↑	Ibis	France	🔒	🔒	🔒	🔒	🔒
33	28	↓	Hanting Hotel	China	🔒	🔒	🔒	🔒	🔒
34	45	↑	Staybridge Suites	United Kingdom	🔒	🔒	🔒	🔒	🔒
35	34	↓	Novotel	France	🔒	🔒	🔒	🔒	🔒
36	50	↑	JW Marriott	United States	🔒	🔒	🔒	🔒	🔒
37	43	↑	Super 8	United States	🔒	🔒	🔒	🔒	🔒
38	25	↓	Renaissance Hotels	United States	🔒	🔒	🔒	🔒	🔒
39	48	↑	Fairfield Inn	United States	🔒	🔒	🔒	🔒	🔒
40	42	↑	Ji Hotel	China	🔒	🔒	🔒	🔒	🔒
41	-	New	Baymont	United States	🔒	🔒	🔒	🔒	🔒
42	31	↓	Millennium Hotels	Singapore	🔒	🔒	🔒	🔒	🔒
43	39	↓	Pullman	France	🔒	🔒	🔒	🔒	🔒
44	23	↓	Grupo Barceló	Spain	🔒	🔒	🔒	🔒	🔒
45	-	New	Four Points	United States	🔒	🔒	🔒	🔒	🔒
46	49	↑	W	United States	🔒	🔒	🔒	🔒	🔒
47	46	↓	Conrad	United States	🔒	🔒	🔒	🔒	🔒
48	38	↓	Taj	India	🔒	🔒	🔒	🔒	🔒
49	-	New	Waldorf Astoria	United States	🔒	🔒	🔒	🔒	🔒
50	-	New	Candlewood Suites	United Kingdom	🔒	🔒	🔒	🔒	🔒

# Leisure & Tourism 10.

Top 10 Most Valuable Leisure & Tourism Brands

© Brand Finance Plc 2022

<p><b>1</b> ← 1 </p> <p><b>Booking.com</b></p> <p>\$8.7bn +5%</p>	<p><b>2</b> ↑ 3 </p> <p><b>airbnb</b></p> <p>\$4.5bn +30%</p>	<p><b>3</b> ↓ 2 </p> <p><b>Trip.com Group*</b></p> <p>\$3.7bn +6%</p>	<p><b>4</b> ← 4 </p> <p><b>中国国旅集团有限公司 CITS GROUP CORPORATION</b></p> <p>\$3.1bn +7%</p>	<p><b>5</b> ← 5 </p> <p><b>TUI</b></p> <p>\$2.8bn 0%</p>
<p><b>6</b> ↑ 10 </p> <p><b>HAPPY VALLEY 欢乐谷</b></p> <p>\$2.0bn +64%</p>	<p><b>7</b> ↓ 6 </p> <p><b>Expedia</b></p> <p>\$1.9bn -27%</p>	<p><b>8</b> ↓ 7 </p> <p><b>AMC THEATRES</b></p> <p>\$1.7bn -6%</p>	<p><b>9</b> ← 9 </p> <p><b>CINEMARK®</b></p> <p>\$1.4bn +13%</p>	<p><b>10</b> NEW </p> <p><b>CAMPING WORLD</b> UK'S No1 CAMPING STORE</p> <p>\$1.4bn -</p>





# Brand Spotlights.





## Hilton

HOTELS & RESORTS

Rank

Brand Value

**1** ←

**\$12.0bn** +58%

Rank

Brand Strength

**3** ↑

**88.0** +7.2

# Interview with Matt Schuyler.



**Matt Schuyler**  
Chief Brand Officer,  
Hilton

**Congratulations on retaining the claim as the Most Valuable Hotels Brand. Hilton's brand value has increased by 58% over the past year and by 11% since 2020, demonstrating that Hilton has bounced back from the pandemic stronger than ever. What were the main initiatives taken to remain as one of the world's top hotel brands over the last couple of years?**

The focus of our initiatives over the last few years has been to invest in customer-focused innovation that responds to guest feedback and preferences.

Our 2022 global trends report provides a glimpse into what this looks like, exploring how the pandemic changed people and how we, as an industry leader, adapted. For example, with more than 23 million U.S. households welcoming a new pet during the pandemic, we recognized that the family pet is an important traveler to consider. Today, Hilton offers more than 5,000 pet-friendly hotels globally across its portfolio, including seven pet-friendly brands in the U.S. and Canada

Other examples include the integration of contactless technology into the guest experience to create a seamless stay, our focus on a holistic approach to wellness, and the introduction to industry-leading food and beverage experiences, to name but a few.

Even during the most challenging times of the pandemic, Hilton and our community of owners continued onward with a strong belief in our company, our team members, our purpose and our values, resulting in significant growth milestones for our award-winning brands around the world, including the first Signia by Hilton, 100<sup>th</sup> Curio Collection by Hilton, 200<sup>th</sup> Tru by Hilton, 500<sup>th</sup> Home2 Suites by Hilton and Hampton by Hilton surpassing 2,700 open hotels.

**Highlighting its strength, Hilton is now in the Top 3 Strongest Hotel Brands in our Hotels 50 2022 ranking with a BSI of 88/100 – a 7.2 point increase since last year. What do you attribute to this strength?**

Our brand strength is grounded in listening to our customers to better understand their preferences and expectations. We also recognize that brand loyalty is hard to achieve and maintain, but it is also easy to lose. The last two years introduced so much uncertainty into our lives, and travelers are seeking reliability and reassurance from the brands they have come to know and trust. Whether introducing product innovations or new services to meet guests' evolving needs, our brands deliver on Hilton's commitment to deliver an exceptional stay. So, regardless of the climate, we will continue to bring our century-long legacy of industry expertise to deliver the world-renowned hospitality Hilton is known for.

**The last year has been characterised by some as the "war for talent" – why should people be attracted to work for the Hilton brand?**

People want to be a part of something bigger than themselves. They want to know they made a difference in the world – in both large and small ways. At Hilton, we were founded on the premise that hospitality brings people together – a vision that has carried on for over a century. We take care of our team members, and they, in turn, take care of our guests.

Over the last few years, workplace organizations, such as Great Places to Work and DiversityInc., have consistently recognized Hilton as one of the top workplaces in the world.

Recognitions such as these are testaments to the welcoming and supportive culture our team members have built together.

Knowing you can grow and chart your own career journey transforms a job into a meaningful career. At Hilton, we are continuing to find new ways to build an inclusive, supportive culture - one that offers continuous learning for all. We want work at Hilton to be one of the best parts of our team members' lives and that means creating opportunities for continuous professional growth and development.

Upskilling, training and growth opportunities are all key to helping team members find fulfillment at work and connect them to our larger purpose. To do so, we're always looking for ways to expand our benefits. A good example of this is our recently announced partnership with Guild Education. Through Guild, team members at Hilton's U.S. owned and managed properties and corporate locations will be able to earn a vast array of educational credentials – including GED, professional certifications in high demand careers, such as culinary and technology, and associate and bachelor's degrees – debt-free as they pursue their personal and professional goals.

If there is one thing we know that won't change, it is that we are a business of people serving people. It's a major reason why people are attracted to hospitality in

the first place. They also want to be part of a sense of esprit de corps, part of something bigger.

**The Hilton brand portfolio is broad and packed full of big brands. What systems and processes do you have in place to make sure that you're tracking the strength and values of your brands effectively?**

At Hilton, we are constantly listening to guest, owner and team member feedback. It's through this feedback that we're able to track our brands' strength, as well as areas of opportunity.

For example, we know there is a new generation of travelers who appreciate locally-minded, elevated and thoughtful travel experiences. They want to be uplifted by the vibe of the dynamic cities that surround them – but also by the service and design of their accommodations. These types of guests are gravitating towards the hotel brands in our Lifestyle portfolio – Canopy by Hilton, Tempo by Hilton and Motto by Hilton – which is expected to double over the next 10 years.

Ultimately, our brands are the lifeblood of our organization and, as we grow globally, we have been challenged to evolve and think about our brands in new ways. We know we must deliver a consistent guest experience, while flexing to meet the rapidly evolving needs of travelers and owners across our growing portfolio of brands.





## NH | HOTEL GROUP PART OF MINOR HOTELS

Rank

**15** ↑

Brand Value

**\$993m** +46.9%

Rank

**11** ↓

Brand Strength

**85.1** +3.1

# Interview with Isidoro Martínez de la Escalera.



**Isidoro Martínez de la Escalera**  
Chief Marketing Officer,  
NH Hotels

## **What is at the heart of NH Hotels' brand strategy?**

Our brand is the footprint and the impression we leave on the customer. It represents the way our customers perceive us. That's why any effective brand strategy should seek to match who you want to be with how you are perceived. The less distance there is between your corporate aspiration and your customers' perception, the more your brand will be appreciated and valued.

In the analogue world, you may have been able to influence this perception with certain very specific image campaigns, but in today's digitalised and open society, such methods are of little use. In the digital sphere, customers are particularly empowered and increasingly demanding. As a brand you have to anticipate their tastes and needs, be in constant contact with them and fine-tune your attributes towards those values that bring us closer and position us where we want to be.

At NH we have always placed the customer at the centre. We are about to celebrate our 45<sup>th</sup> anniversary and during this time we believe that we have been able to anticipate their preferences based on solid brand attributes that have been appreciated over time. We have functional values linked to quality, to the strategic location of our hotels, to efficiency; other aspirational values, linked to gastronomy, to differential service; and other highly emotional values, linked to the warmth of our human treatment, to the honesty with which we keep our promises and to transparency. In short, we have long been very clear that our product is the customer experience and everything comes together to meet and exceed the expectations of our guests every day.

In the last two years, we have also taken special care to ensure the safety of our customers and employees and we have committed ourselves to solidarity as a way of dealing with the difficult situations generated by the health crisis and the economic crisis associated with it. By reinforcing these two commitments, we have managed to regain the confidence of a bewildered consumer, and to give continuity and strength to those values most appreciated by customers in these volatile times.

## **What do you consider to be the secret to your brand's growth?**

Insisting on improving our customers' experience by encouraging them to connect with us and getting them to recommend us. If we manage to maintain a fluid dialogue with them based on mutual trust, we will be closer to success. And that is achieved through a consolidated, reliable and participative brand. Over the years we have distilled a very solid corporate narrative, in which we have the legitimacy of a very clear track record and an offer that is clearly coherent with the values that represent us, based on both the physical attributes of our hotels and the digitalisation of processes, while maintaining the human touch in our interactions with guests as a hallmark of our identity.

As a company, we are oriented towards premium and experiential urban tourism, both leisure and business, with very good locations in the most important cities. With this very specific profile, we also have different brands that segment the offer according to the characteristics of each client. In this way, we ensure exclusive experiences and the maximum personalisation of services for each stay.

Since our integration with Minor Hotels at the end of 2018, we have also consolidated our position as one of the world's major hotel groups.

Beyond our recognised presence in the urban segment through our benchmark brand NH Hotels, we have strengthened our presence in the premium segment with NH Collection. The integration with Minor has allowed us to expand our universe of brands and to enter strongly into the European luxury sector thanks to Anantara, and into the resort sector with Tivoli. We are also expanding our offer for a segment of young travellers, the Millennials, with innovative lifestyle brands such as nhow and Avani.

**How has the brand evolved? How has the NH brand managed to be top of mind for several generations? What challenges have you faced?**

With coherence and perseverance. I think the key is that we have managed to stay true to our brand values over time, while at the same time incorporating new services and experiences in line with customer trends and needs. In other words, we have made the brand's value proposition grow without leaving aside what makes us who we are and what the customer looks for and expects in each of their interactions with us. The success of this strategy, which has led us to remain at the top of mind for years in all our key markets, is based on an exhaustive knowledge of the customer, a process of active listening and leadership in terms of innovation, experience, responsibility and efficiency. Each of these values has an impact on the final image of the brand. These are issues of the utmost importance that we resolve with a clear vision of the future and always with the customer at the centre of everything we do.

In such a long process, we have had the opportunity to incorporate different hotel portfolios, with very different structures and characteristics, and throughout economic cycles that have not always been easy. We have managed to imbue them with the spirit and style of our brand; to be able to integrate them and make them distil that NH way of understanding hospitality. This has probably been our greatest success over time, and it is clear that this can only be achieved thanks to a team of professionals who are committed, passionate and committed to the Group's values.

**Does NH's financial area work together with the marketing area to implement brand actions? What benefits do you find in this collaboration?**

The business areas of our company have long ceased to be watertight compartments. There are no independent tasks in the hotel business. Each part influences the others. Without a holistic and integrated view of the different departments, it is impossible to achieve effective results.

If we focus on the last two years, those of the pandemic, it is clear that financial management has been decisive for the economic viability, for the corporate brand image and for the future of the Group and its professionals. At the same time, the commitment of employees, technological innovation, process automation, extraordinary security measures and relationships of trust and proximity with suppliers have also been decisive.

In the hotel business, all activities are closely interrelated. Bringing all these factors together in a single melody, and making it sound good and memorable in the ears and minds of every customer, is a challenge. And we can only approach it with the effort and commitment of everyone.

In NH, all these collaborative and cross-functional ways of understanding the offer and the brand were commonplace long before the pandemic. The sector was in a very intense process of reinvention.





The pandemic has accelerated it, but many of the basics were already in place. The task of Marketing and Communications is to bring coherence to all these processes and to translate them into a univocal and attractive final brand image.

**Behind every crisis there is an opportunity, the COVID19 has pushed many brands to implement actions that had not been considered in the roadmap initially, but have been a success and have brought unexpected value to the brand, so they will be maintained over time. Do you have any examples in NH?**

In general, the pandemic has forced the sector to digitise and reinvent many aspects of customer management. Fortunately, in our case, by the time the crisis hit, we already had much of the work underway and simply had to accelerate the large-scale implementation of digitised services and proven technological advances. This allowed us, and still allows us, to give an extremely agile and efficient response to the new needs and trends demanded by the client. Today, any guest can carry out all their interactions in the hotel digitally. Check-in, room selection, check-out, reservations in restaurants, gyms, access to the press or even request additional amenities. In addition, these advances previously made, allowed us to open our hotels after the first de-escalation with 700 new security standards, many of which are going to stay.

In short, we have reinvented the model to be even more efficient. We have learned to invest in what the customer appreciates and needs in their stay with us, while employing digitalisation, automation and robotisation to

optimise back office processes and offer an increasingly extraordinary customer experience that is personalised, secure, agile and always with a human touch.

**It is said that the pandemic may be reduced to endemic this year. What changes may the new normal bring in terms of business and brand image?**

It is still too early to say, but if so, it will mean that we will no longer be living in a permanent state of emergency pending measures and restrictions. Having the freedom to travel to any destination, permanently reactivating international travel, being able to hold meetings and events with a large number of attendees, as well as not having limited seating capacity in restaurants, will be definitive in maintaining the positive evolution of recovery to pre-pandemic levels that we have already seen in recent months.

In any case, we must continue to be responsible and maintain the safety of our professionals and clients as a priority.

Likewise, we are seeing as a post-pandemic trend an acceleration of guest expectations for brands and operating models to incorporate sustainability criteria as a priority, both at the level of reducing the impact on the environment and social responsibility. For this reason, in the next economic cycle, Sustainability will be one of the pillars to further consolidate trust in our brand.

We believe that the quality of the guest experience, reinforced with safety and sustainability, will allow us to maintain our leading position in brand recommendation and booking preference among our customers.





## TAJ

Rank	Brand Value
<b>48</b> ↓	<b>\$314m</b> +6%

Rank	Brand Strength
<b>1</b> ↑	<b>88.9</b> -0.4



**Brand Finance®  
Awards**

**STRONGEST  
INDIAN  
BRAND**

# Interview with Puneet Chhatwal.



**Puneet Chhatwal**  
Managing Director  
& CEO, Indian Hotels  
Company Limited (IHCL)

**Congratulations to Taj Hotels for being the Strongest Indian brand in 2022. What do you attribute to this strength, resulting in its leading position in the country?**

This recognition is a testimony to the unstinting support and affection of our guests, the unwavering commitment of our associates and the trust placed in us by our partners and stakeholders. Since the very beginning, Taj has occupied a very special place in the hearts of its patrons and has formed everlasting bonds. From introducing the country's first luxury hotel in 1903, Taj has continuously surpassed the expectations that come along with being a leader in the luxury hospitality space. Staying true to its core values of Trust, Awareness and Joy, Taj has also been a frontrunner in its efforts towards ensuring the greater good of the community, while delighting its guests and partners, all with the signature warmth of Tajness. It is this journey of over a century, in which the nation has walked along with us, that brings us this accolade today.

**What qualities does Taj focus on when building its global communications and brand campaigns, especially as a respected and authentic Indian brand?**

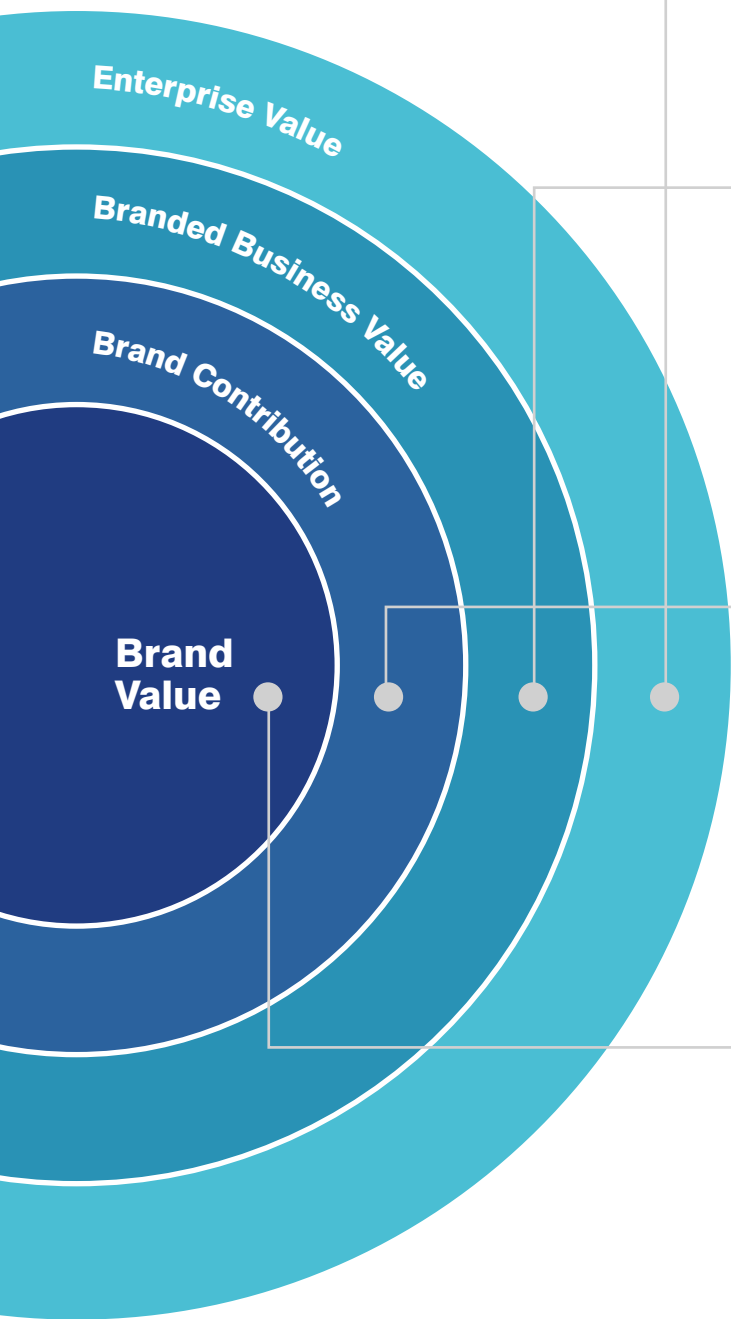
A deep understanding of our guests' needs, our signature warmth and our distinct style of luxury are the key pillars we focus on while crafting any communication or any offering. Always keeping the expectations and emotions of our guests in mind, we believe in communicating with our heart and creating a distinction in the minds and souls of our audience. In doing so, we are always rooted in the tradition and values that are inherent to authentic Indian hospitality, and are also mindful of the sensibilities, interpretations and regulations that come along with communicating in different geographies or to different demographics.





# 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'.



[Hampton Inn]

### + 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.



[Hampton Inn]

### + 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.



[Hampton Inn]

### + 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.

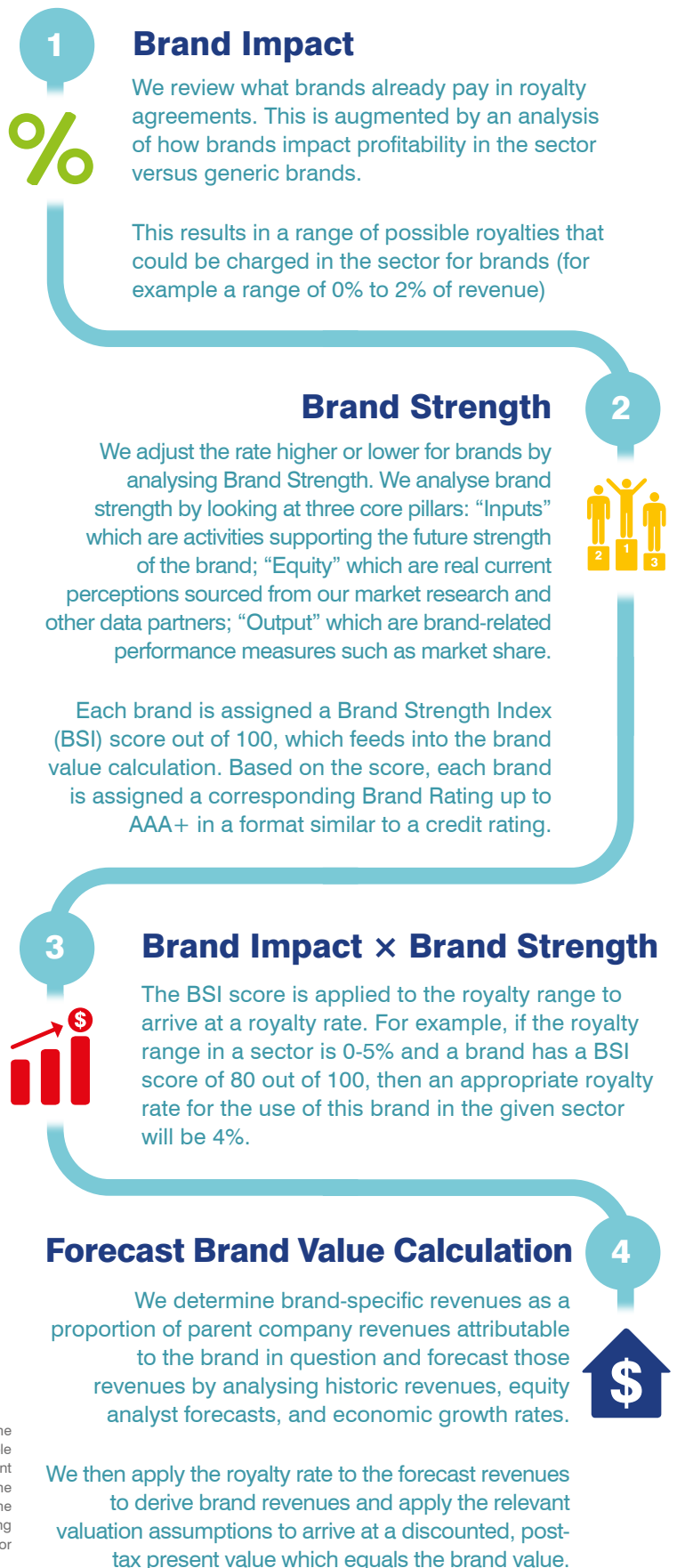
As a result, Brand Finance always incorporates a review of what users of brands actually pay for the use of brands in the form of brand royalty agreements, which are found in more or less every sector in the world.

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.

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 36 countries and across more than 29 sectors with approximately 100,000 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.

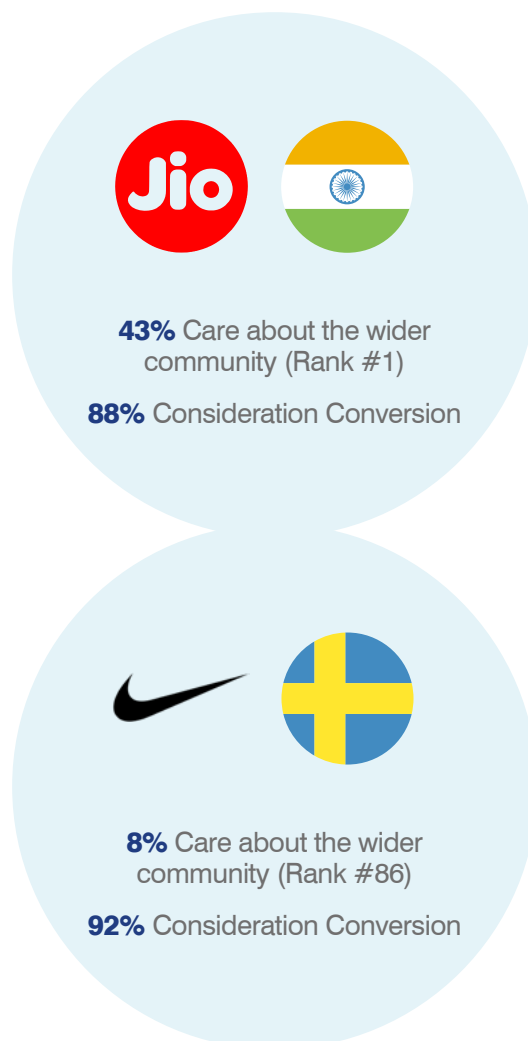
## Who's the coolest cat?

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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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 2<sup>nd</sup>-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 2022

	1 <sup>st</sup>	2 <sup>nd</sup>	3 <sup>rd</sup>
	 PORSCHE	<b>Jeep</b>	
	<b>Levi's</b> <sup>®</sup>		
	 <b>CONVERSE</b>		 PORSCHE
		 PORSCHE	 <b>UNDER ARMOUR</b>

# 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



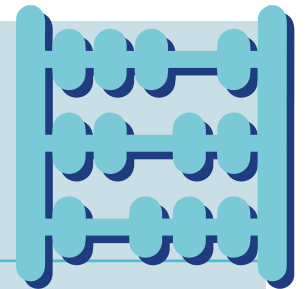
- + Are we building our brands' strength effectively?
- + How do I track and develop my brand equity?
- + How strong are my competitors' brands?
- + Are there any holes in my existing brand tracker?
- + What do different stakeholders think of my brand?

### 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.

# Communications Services.

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



**Brand Accolade** – Create a digital endorsement stamp for use in your brand's marketing materials, communications, annual reports, sales documents, recruitment purposes, social media channels and website.



Brand Finance®  
Awards

TOP 50  
HOTEL  
BRAND



Brand Finance®  
Awards

MOST VALUABLE  
HOTEL  
BRAND



Brand Finance®  
Awards

STRONGEST  
HOTEL  
BRAND



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



**Bespoke Events** – Organise a report launch, award ceremony or celebratory event, coordinate event opportunities and spearhead communications to ensure a good return on investment.



**Digital Infographics** – Design infographics visualising your brand's performance for use across your brand's social media platforms or on other digital materials.



**Trophies & Certificates** – Provide a trophy and/or a hand written certificate personally signed by the Brand Finance Chairman to recognise your brand's performance of that year.



**Brand Spotlight** – Publish contributed brand article or an interview with your brand leader, in the relevant Brand Finance sector report, offered to the Brand Finance network and press.



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

# 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).

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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<sup>®</sup> Institute

## Brand Finance Institute

*Learn how to build, protect and measure brand value*

The Brand Finance Institute is the educational division of Brand Finance, offering expert training on brand evaluation, management and strategy.

Our in-house training and workshops, online learning offer and webinars will help you answer key strategic questions about your brand for different levels of seniority and development needs:

- How can I grow brand value?
- How can I build a business case to show the return on my marketing investment?
- How can I set up my marketing budget using brand research and analytics?

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For more information, contact [enquiries@brandfinance.com](mailto:enquiries@brandfinance.com) or visit [brandfinanceinstitute.com](http://brandfinanceinstitute.com)

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



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