



# Hotels

# 50

# 2023

**The annual report on the most valuable and strongest Hotel brands**  
June 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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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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Research Findings



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- + 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](https://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**
- **38 countries** and **31 sectors** covered
- More than **150,000 respondents** surveyed annually
- We are now **in our 7<sup>th</sup> consecutive year** conducting the study

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or email [enquiries@brandfinance.com](mailto:enquiries@brandfinance.com)



# Foreword.

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**David Haigh**  
Chairman,  
Brand Finance

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

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

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

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

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

# Hilton checks in as the world's most valuable hotel brand.

- + **Hilton** delivers an exceptional service as the reigning champion of hotel brands, valued at US\$11.7 billion
- + **Le Méridien** is named the fastest-growing hotel brand as a new entrant to Top 50 ranking
- + **Autograph Collection Hotels** also makes a grand entrance, named the second-fastest growing hotel brand
- + Half of top 50 hotel brands remain below pre-pandemic values, with **Wyndham** seeing the biggest decrease
- + **Conrad** takes an extraordinary leap to become the world's strongest hotel brand, with an AAA+ rating
- + **Hilton** has the highest Sustainability Perceptions Value (SPV), topping the rankings at US\$565 million
- + **Taj** has the highest Sustainability Perceptions Score, 5.04 out of 10



# Ranking Analysis.



# Ranking Analysis.

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## Hilton delivers an exceptional service as the reigning champion of hotel brands, valued at US\$11.7 billion

**Hilton** (brand value down 2% to US\$11.7 billion) retains its title as the world's most valuable hotel brand, according to the latest report from leading brand valuation consultancy, Brand Finance. 2022 was an exceptional year of brand value growth for Hilton, with revenue soaring as both business and leisure travel surged post-pandemic. This year's result indicates a slight slowdown in this growth momentum, as the industry returns to a more normal trajectory. That said, Hilton's brand value remains above its pre-pandemic level, and it is almost double that of runner-up, **Hyatt** (brand value up 3% to US\$6.1 billion).

During and post-pandemic, Hilton has demonstrated an ongoing commitment to innovation. Most recently,

Hilton announced a partnership to launch a new cloud-based property management technology platform at its hotels to address the growing demand for modern amenities and seamless technology experiences for guests in addition to other recently launched industry-firsts like confirmed connecting rooms and digital key share.

Hilton also boasts the most valuable hotel portfolio in the world, solidifying its top ranking through further expanding its global presence. In 2022, Hilton opened its 7,000<sup>th</sup> hotel worldwide, surpassed 150 million Hilton Honors members and welcomed nearly 200 million guests.

The American giant has strategically strengthened its portfolio worldwide, including renowned destinations like the South of France and the Asia-Pacific region. These efforts aim to reinforce Hilton's brand value, familiarity, and global reputation.

Top 10 Most Valuable Hotel Brands

© Brand Finance Plc 2023



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.

**Hilton**, despite dropping two ranks in brand strength to 5<sup>th</sup> place this year, retains its AAA rating. Its ongoing investment in technology and innovation showcases its dedication to meeting evolving customer preferences, while upholding its position as a top luxury hotel brand.

The hotel giant's strong brand recognition and local market familiarity (scoring 73% for the familiarity metric) have been instrumental in its post-pandemic recovery.

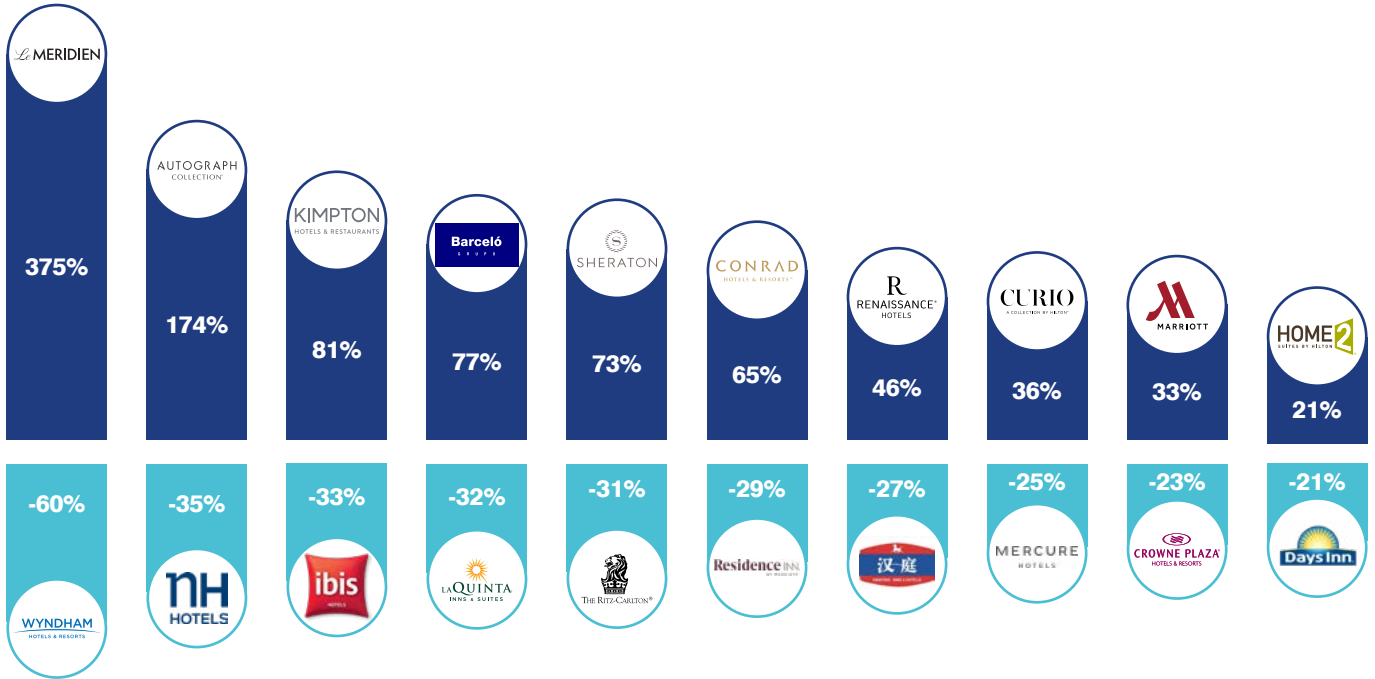
**In the post-pandemic world, Hilton has demonstrated remarkable resilience and a**

**steadfast commitment to delivering exceptional experiences. With an unwavering focus on guest satisfaction, Hilton has not only recovered but has emerged stronger in several aspects, solidifying its position as a leading global brand. Through innovative strategies and a dedication to shifting consumer needs, it has retained its title as the world’s most valuable hotel brand.**

Henry Farr  
Associate Director, Brand Finance

Brand Value Change 2023-2022 (%)

© Brand Finance Plc 2023



**Le Méridien is named the fastest-growing hotel brand as a new entrant to Top 50 ranking**

Le Méridien (brand value up 375% to US\$669.4 million) checks into the 2023 top 50 ranking in 23<sup>rd</sup> as the fastest-growing hotel brand. Part of the **Marriott** (brand value up 33% to US\$3.1 billion) International portfolio, Le Méridien has been expanding its presence across the globe in the past year.

Most recently, Le Méridien established Le Méridien Melbourne. Its premium location and luxury features have attracted both tourists and locals, further boosting the hotel’s revenue from bookings in one of Australia’s most popular coastal cities.
















Other significant growth milestones for Le Méridien include its second hotel opening in New York City, which is hoped to boost its familiarity score in the US and globally. This year, Marriott International has also signed an agreement to expand the Le Méridien group in the UAE, launching a new hotel located in a desirable beachfront location. The project is seen as a fit for the growing tourism sector in Ras Al Khaimah and is expected to further propel Le Méridien’s global familiarity and fast-growing brand value.

As one of Marriot’s most recognisable brands, Le Méridien also ranks an impressive 3<sup>rd</sup> for brand strength this year. In 2022, Le Méridien launched a renovation project for its hotel designs, aimed at appealing to changing traveller preferences for more modern features, while also remaining true to its rich heritage. Such endeavour demonstrates that Le Méridien is committed to evolving its brand identity, which is hoped to further enhance its brand value, as well as boost its familiarity score going forward and in future rankings.



## Top 10 Strongest Hotel Brands

© Brand Finance Plc 2023

<p><b>1</b> ↑ 39 </p> <p><b>CONRAD</b> HOTELS &amp; RESORTS™</p> <p>91.0 +13.7 AAA+</p>	<p><b>2</b> NEW </p> <p><b>AUTOGRAPH</b> COLLECTION™</p> <p>90.9 +12.3 AAA+</p>	<p><b>3</b> NEW </p> <p><i>Le</i> <b>MERIDIEN</b></p> <p>89.9 +25.1 AAA+</p>	<p><b>4</b> ↓ 1 </p> <p><b>TAJ</b></p> <p>89.4 +0.5 AAA</p>	<p><b>5</b> ↓ 3 </p> <p> <b>Hilton</b> HOTELS &amp; RESORTS</p> <p>87.5 -0.5 AAA</p>
<p><b>6</b> ↑ 17 </p> <p> <b>MARRIOTT</b></p> <p>86.9 +3.6 AAA</p>	<p><b>7</b> ↑ 38 </p> <p><b>Scandic</b></p> <p>86.9 +9.6 AAA</p>	<p><b>8</b> ↓ 6 </p> <p> <b>JW MARRIOTT</b></p> <p>86.6 +0.1 AAA</p>	<p><b>9</b> ↑ 18 </p> <p> <b>THE RITZ-CARLTON®</b></p> <p>86.6 +3.5 AAA</p>	<p><b>10</b> ↑ 48 </p> <p> <b>Barceló</b> GRUPO</p> <p>86.5 +17.0 AAA</p>

### Autograph Collection Hotels also makes a grand entrance, named the second-fastest growing hotel brand

**Autograph Collection Hotels** (brand value up 174% to US\$647 million) is another stand-out performer in this year's ranking, entering closely behind **Le Méridien** in 25<sup>th</sup>. Also a member of the **Marriott** portfolio, the group's brand value growth can be attributed to increased revenue from hotel expansion and added rooms. Notable expansions in the previous year include a luxury all-inclusive resort in Cancun, featuring over 1000 suites, and a new opening in the popular Maltese coastal town of St Julians, marking the group's first hotel opening in Malta.

Autograph Collection jumps one spot ahead of Le Méridien to rank 2<sup>nd</sup> for brand strength this year, with an AAA+ rating. AC Hotels' strong brand perception is likely boosted by the global recognition enjoyed by parent company Marriott, which scored a strong score of 72% for familiarity in the US. AC's strong performance this year, enhanced by its expanding global collection of distinctive properties, positions it favourably to enhance its familiarity and consideration scores going forward.



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## More than half of top 50 hotel brands remain below pre-pandemic values, with Wyndham seeing the biggest decrease

After two years of global travel restrictions and economic uncertainty, the past year has witnessed an increasing return to pre-pandemic travel patterns. However, Brand Finance research finds that the hotel industry is slow to recover from the pandemic's long-lasting effects, as 27 out of 50 hotel brands (54%) remain below their pre-pandemic values.

**Wyndham Hotels**, (brand value down 60% to US\$408.92 million) has seen the biggest decline. This drop can be attributed to a decline in occupancy and retention rate and overall revenue, as Wyndham struggles to recover its pre-pandemic reputation and consumer appeal. In its local US market, Wyndham scored 84% for consideration in 2021, dropping to 46% in 2022. Widely known for its more budget-friendly offerings, Wyndham is facing increased competition from giants like **Hilton**, **Hyatt**, and **Marriott**, who are more successful at retaining customer loyalty through loyalty programmes, through which travellers can redeem points at high-end properties.

## Conrad takes an extraordinary leap to become the world's strongest hotel brand, with an 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.

**Conrad** (brand value up 65% to US\$537.82 million) has jumped up 16 spots to 31st position overall, while jumping an astonishing 38 spots into the winning position for brand strength, scoring 91/100. Known for its luxurious options and personalised service, Conrad has boosted its brand strength this year through significant global expansion.

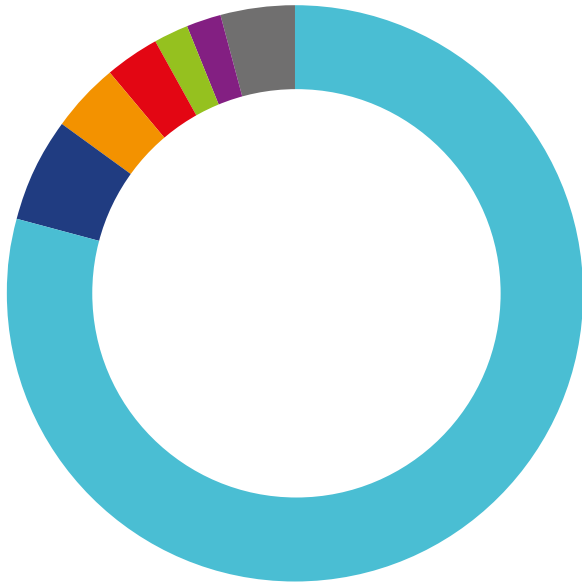
Hilton opened six new Conrad Hotels and Resorts in various desirable locations, including LA and Shanghai, with the aim of enhancing its long-standing reputation for seamless luxury and exceptional hotel design.

As part of the Hilton portfolio, Conrad also benefits from Hilton's established global reputation, extensive network, and loyalty programme. By leveraging Hilton Honours, Conrad Hotels has continued to boost its brand strength by fostering customer loyalty, promoting guest engagement, and encouraging repeat bookings.

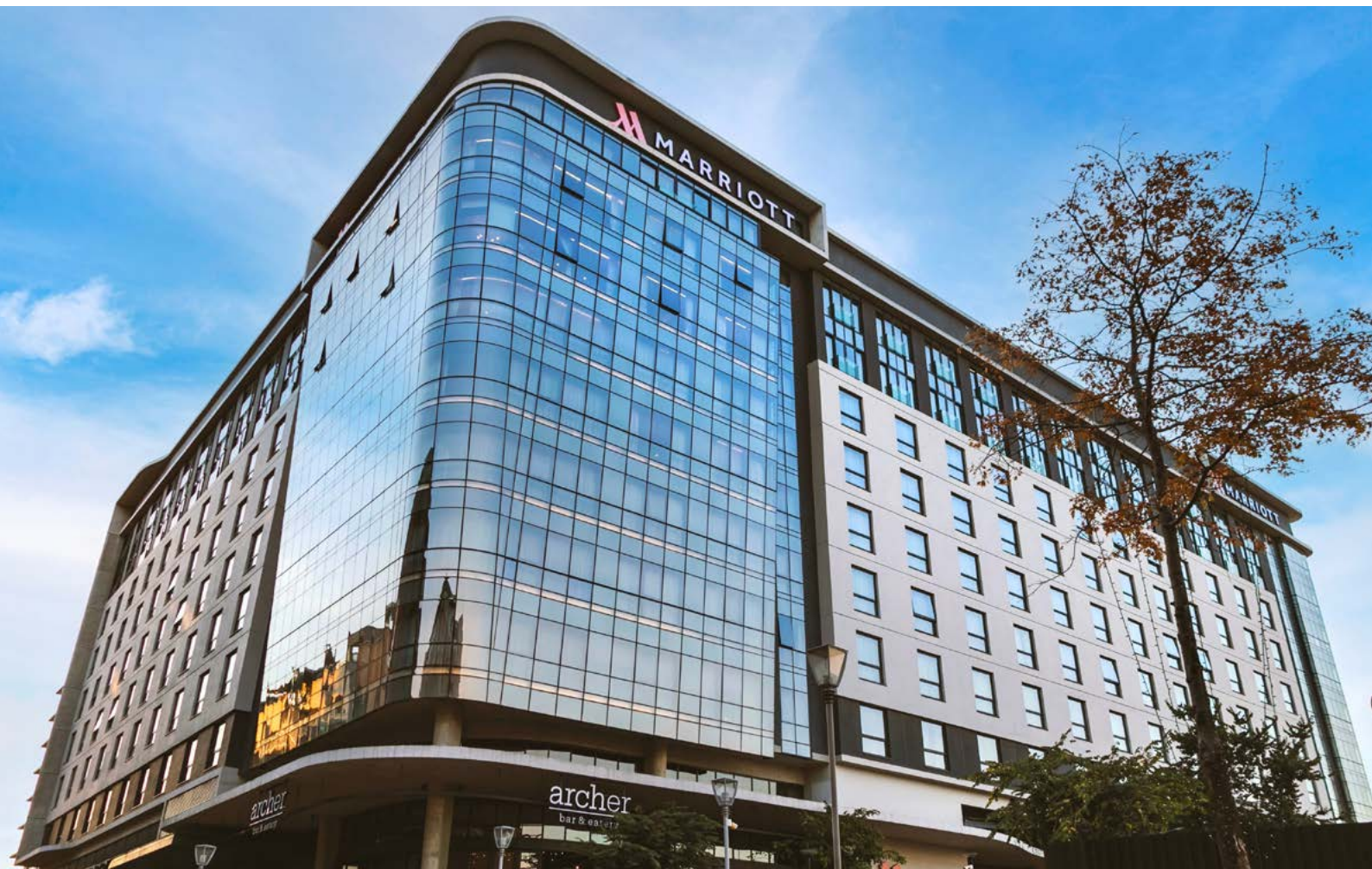


Brand Value by Country

© Brand Finance Plc 2023



Country	Brand Value (USD bn)	% of total	Number of Brands
United States	48,004	80%	33
United Kingdom	3,650	6%	4
China (Hong Kong)	2,117	4%	1
France	1,705	3%	4
China	1,269	2%	3
Spain	1,260	2%	2
Other	2,127	4%	3
<b>Total</b>	<b>60,132</b>	<b>100%</b>	<b>50</b>



**Sustainability Perception Values (SPV)**

© Brand Finance Plc 2023

\$xx = sustainability perceptions value

x.x = sustainability perceptions score/10

<p><b>1</b> </p>  <p><b>USD\$565 m</b> 4.15</p>	<p><b>2</b> </p>  <p><b>USD\$307 m</b> 4.37</p>	<p><b>3</b> </p>  <p><b>USD\$202 m</b> 4.09</p>	<p><b>4</b> </p>  <p><b>USD\$180 m</b> 4.15</p>	<p><b>5</b> </p>  <p><b>USD\$107 m</b> 4.37</p>
<p><b>6</b> </p>  <p><b>USD\$105 m</b> 4.48</p>	<p><b>7</b> </p>  <p><b>USD\$76 m</b> 4.06</p>	<p><b>8</b> </p>  <p><b>USD\$60 m</b> 4.31</p>	<p><b>9</b> </p>  <p><b>USD\$59 m</b> 3.75</p>	<p><b>10</b> </p>  <p><b>USD\$48 m</b> 3.44</p>

**Hilton has highest Sustainability Perceptions Value (SPV), topping the ranking at US\$565 million**

As part of its analysis, Brand Finance assesses the role that specific brand attributes play in driving overall brand value. One such attribute, is sustainability. Brand Finance assesses how sustainable specific brands are perceived to be, represented by a ‘Sustainability Perceptions Score’. This is an indexed score that provides a view of the role of sustainability in driving positive brand reputation. The value that is linked to sustainability perceptions, the ‘Sustainability Perceptions Value’, is then calculated for each brand.

**Hilton** has the highest Sustainability Perceptions Value (SPV) at US\$565 million. Although Hilton has committed to becoming more sustainable, its position at the top of the SPV table is not an assessment of its overall sustainability performance. Rather, it indicates how much brand value it has tied up in sustainability perceptions.

Hilton's commitment to sustainability is evident through its ESG program, Travel with Purpose. The brand has set ambitious targets, aiming to reduce emissions intensity by 75% in Hilton-managed hotels and 56%

in Hilton-franchised hotels by 2030. As a trailblazer, Hilton was the first major hotel company to establish the Science Based Targets Initiative (SBTi), aligning its emissions reduction goals with the Paris Agreement.

In addition to internal efforts, Hilton actively collaborates with local governments to support sustainability initiatives and has formed partnerships with organisations such as World Wildlife Fund and Clean the World, leveraging their expertise and resources to further advance sustainable practices within the hospitality industry.





### Taj has the highest Sustainability Perceptions Score, 5.04 out of 10

India based hotels brand 'Taj' (brand value up 19% to US\$374.35 million) earns the highest Sustainability Perceptions Score in the Hotels 50, 2023 ranking at 5.04 out of 10.

In 2022, Taj's parent company, **IHCL**, launched the Paathya sustainability programme, encompassing several key initiatives. Firstly, the group has committed to eliminating the use of single-use plastics across all its hotels. Additionally, every Taj hotel benchmarks with international sustainability certification standards.

77 hotels in the portfolio are Earth Check certified, 57 being platinum certified. The brand has also installed electric vehicle (EV) charging stations in over 118 of its properties, showcasing its dedication to eco-friendly transportation. To enhance the guest experience, the hotels have switched to using bio-degradable wrapping for dry amenities in guest rooms, further reducing plastic waste and increased the focus on

implementation of water conservation and waste reduction measures.

To address its energy consumption, Taj has set a target for all its hotels to be powered by 50% renewable energy by 2030. Demonstrating its commitment to this objective, Taj's flagship hotel, The Taj Mahal Palace in Mumbai, has already achieved the remarkable feat of operating on 100% green energy. This achievement has been made possible through increased utilisation of renewable energy sources.

Taj Hotels is also actively engaged in the community with its efforts to promote intangible cultural heritage in collaboration with UNESCO, skilling of youth, and creating awareness about sustainability practices through volunteering.

Taj Hotels sustainability initiatives have yielded significant progress and garnered the attention and support of stakeholders, as reflected in the brand's position at the top of the Sustainability Perceptions Score table.



# Brand Value Ranking (USDm).











## Top 50 most valuable Hotel brands 1-50

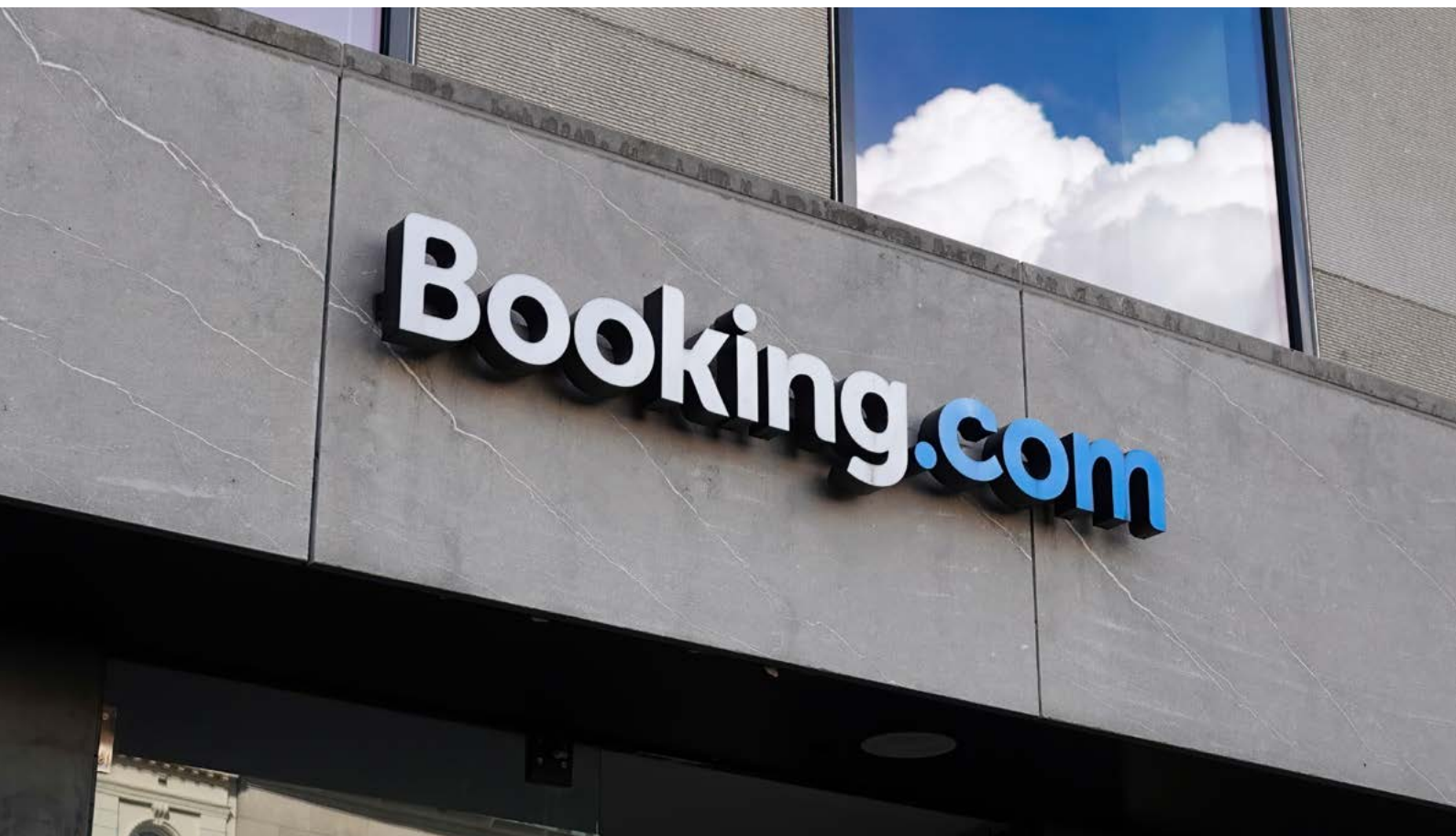
2023 Rank	2022 Rank		Brand	SECTOR	2023 Brand Value	Brand Value Change	2022 Brand Value	2023 Brand Rating	2022 Brand Rating
1	1	←	Hilton	United States	11,746	-2%	12,040	AAA	AAA
2	2	←	Hyatt	United States	6,072	+3%	5,905	AAA	AA+
3	4	↑	Hampton Inn	United States	4,255	+8%	3,928	AAA-	AAA
4	3	↓	Holiday Inn	United States	3,746	-10%	4,155	AA+	AAA-
5	5	←	Marriott	United States	3,066	+33%	2,313	AAA	AAA-
6	7	↑	Shangri-La	China (Hong Kong)	2,117	+11%	1,911	AAA	AAA
7	6	↓	Double Tree	United States	2,023	-4%	2,111	AAA-	AAA
8	18	↑	Sheraton	United States	1,612	+73%	929	AAA	AAA
9	9	←	Embassy Suites	United States	1,371	-5%	1,437	AAA	AAA
10	8	↓	Intercontinental	United Kingdom	🔒	🔒	🔒	🔒	🔒
11	11	←	Comfort	United States	🔒	🔒	🔒	🔒	🔒
12	12	←	Premier Inn	United Kingdom	🔒	🔒	🔒	🔒	🔒
13	10	↓	Crowne Plaza	United Kingdom	🔒	🔒	🔒	🔒	🔒
14	19	↑	Crown	Australia	🔒	🔒	🔒	🔒	🔒
15	21	↑	Westin	United States	🔒	🔒	🔒	🔒	🔒
16	16	←	Courtyard	United States	🔒	🔒	🔒	🔒	🔒
17	22	↑	Scandic Hotels	Sweden	🔒	🔒	🔒	🔒	🔒
18	20	↑	Homewood Suites	United States	🔒	🔒	🔒	🔒	🔒
19	13	↓	The Ritz-Carlton	United States	🔒	🔒	🔒	🔒	🔒
20	24	↑	Quality	United States	🔒	🔒	🔒	🔒	🔒
21	17	↓	Mercure	France	🔒	🔒	🔒	🔒	🔒
22	29	↑	Home2 Suites	United States	🔒	🔒	🔒	🔒	🔒
23	-	New	Le Méridien	United States	🔒	🔒	🔒	🔒	🔒
24	15	↓	NH Hotels	Spain	🔒	🔒	🔒	🔒	🔒
25	-	New	Autograph Collection Hotels	United States	🔒	🔒	🔒	🔒	🔒
26	25	↓	Ramada	United States	🔒	🔒	🔒	🔒	🔒
27	44	↑	Grupo Barceló	Spain	🔒	🔒	🔒	🔒	🔒
28	28	←	Jinjiang	China	🔒	🔒	🔒	🔒	🔒
29	38	↑	Renaissance Hotels	United States	🔒	🔒	🔒	🔒	🔒
30	27	↓	Extended Stay America	United States	🔒	🔒	🔒	🔒	🔒
31	47	↑	Conrad	United States	🔒	🔒	🔒	🔒	🔒
32	23	↓	Residence Inn	United States	🔒	🔒	🔒	🔒	🔒
33	34	↑	Staybridge Suites	United Kingdom	🔒	🔒	🔒	🔒	🔒
34	26	↓	La Quinta	United States	🔒	🔒	🔒	🔒	🔒
35	39	↑	Fairfield Inn	United States	🔒	🔒	🔒	🔒	🔒
36	14	↓	Wyndham	United States	🔒	🔒	🔒	🔒	🔒
37	37	←	Super 8	United States	🔒	🔒	🔒	🔒	🔒
38	31	↓	Days Inn	United States	🔒	🔒	🔒	🔒	🔒
39	48	↑	Taj	India	🔒	🔒	🔒	🔒	🔒
40	35	↓	Novotel	France	🔒	🔒	🔒	🔒	🔒
41	-	New	Kimpton	United States	🔒	🔒	🔒	🔒	🔒
42	36	↓	JW Marriott	United States	🔒	🔒	🔒	🔒	🔒
43	40	↓	Ji Hotel	China	🔒	🔒	🔒	🔒	🔒
44	-	New	Curio	United States	🔒	🔒	🔒	🔒	🔒
45	41	↓	Baymont	United States	🔒	🔒	🔒	🔒	🔒
46	33	↓	Hanting Hotel	China	🔒	🔒	🔒	🔒	🔒
47	43	↓	Pullman	France	🔒	🔒	🔒	🔒	🔒
48	-	New	Dreams	United States	🔒	🔒	🔒	🔒	🔒
49	32	↓	Ibis	France	🔒	🔒	🔒	🔒	🔒
50	46	↓	W	United States	🔒	🔒	🔒	🔒	🔒

# Leisure & Tourism 10.

## Top 10 Most Valuable Leisure & Tourism Brands

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<p>1 ← 1 </p> <p><b>Booking.com</b></p> <p>USD\$8.8 bn +1%</p>	<p>2 ← 2 </p> <p><b>airbnb</b></p> <p>USD\$5.6 bn +25%</p>	<p>3 ← 3 </p> <p><b>Trip.com Group*</b></p> <p>USD\$3.3 bn -10%</p>	<p>4 ↑ 5 </p> <p><b>TUI</b></p> <p>USD\$3 bn +8%</p>	<p>5 NEW </p> <p><b>Royal Caribbean INTERNATIONAL</b></p> <p>USD\$2.6 bn +162%</p>
<p>6 ↑ 8 </p> <p><b>AMC THEATRES.</b></p> <p>USD\$2.1 bn +20%</p>	<p>7 NEW </p> <p><b>LIVE NATION ENTERTAINMENT</b></p> <p>USD\$1.9 bn +65%</p>	<p>8 ↓ 7 </p> <p><b>Expedia</b></p> <p>USD\$1.8 bn -8%</p>	<p>9 NEW </p> <p><b>NORWEGIAN CRUISE LINE</b></p> <p>USD\$1.4 bn +5%</p>	<p>10 NEW </p> <p><b>Carnival</b></p> <p>USD\$1.3 bn +73%</p>



# Brand Spotlights.





# Hilton

HOTELS & RESORTS

Rank

**1**



Brand Value

**US\$11.7 bn**  
**-2%**

Rank

**5**



Brand Strength

**87.5**  
**-0.5%**

# Interview with Matt Schuyler.



**Matt Schuyler**  
Chief Brand Officer, Hilton

**Congratulations on Hilton being named the World's Most Valuable Hotel Brand once again. Additionally, it's noteworthy that several brands within the Hilton portfolio have secured spots in the top 50, with Hilton boasting the most valuable portfolio in the sector. Could you share the key strategies that have played a pivotal role in ensuring the success and market recognition of these sub-brands?**

Thank you – we are thrilled to be recognized for another year! We believe our success really lies in our ability to innovate and deliver new products, programs, and services that meet guests' changing needs while delivering on Hilton's promise of an exceptional stay. Travelers today are seeking experiences and to stay with brands they know, trust, and reflect their lifestyle - and this can mean any number of things - from the ability to travel with their pet, jump on a Peloton to maintain their fitness routine, or engage in a once-in-a-lifetime culinary experience. At Hilton, we continue to innovate to deliver on those expectations across our portfolio of brands to continually bring value to our guests.

**How does Hilton maintain consistency and cohesiveness across its portfolio of brands while still allowing each brand to cater to specific market segments and target audiences?**

Our founder, Conrad Hilton, had a simple dream – “to deliver the light and warmth of hospitality around the world,” and in many ways, this is our foundation. Hilton's signature hospitality is what unites us and connects our team members, strategies, and family of brands – it is our superpower. While innovating to meet the market, audiences, and specific regions will always be a top priority for us, we also have an exceptional track record of keeping the authenticity of Hilton's core purpose within every brand.



**Hilton has been experiencing remarkable growth, with the opening of an impressive 355 new hotels globally in 2022 and the successful launch of the new Spark brand earlier this year. Looking ahead, can you provide any insights or hints regarding potential upcoming brand launches or the introduction of new sub-brands that we can anticipate in the near future?**

Building brands is what we do best at Hilton, and we are proud of our rich history of delivering some of the best products in the hospitality business – it is a consistent flywheel of diligent research, planning, and iterating to get the product just right. Following the launch of Spark by Hilton, we recently launched our newest brand under the working name Project H3. This brand is a lower mid-scale long-stay product that was created to serve the booming extended-stay market, catering to travelers who are looking to stay 20+ nights.

And we won't stop there, and we are constantly studying the travel landscape to determine gaps in the marketplace where we can successfully build and grow a new brand that delivers value to owners and guests alike.

**Are you able to highlight the segments that you believe will be most important for Hilton in the next 5 years, along with any brand plans or strategies you may have for those segments?**

It's an exciting time for us, travel is booming as people are excited to explore the world around them once more. As that demand builds, we need to strengthen our portfolio and ensure Hilton has a hotel for every guest and every stay occasion.

Additionally, we are seeing several inexorable market trends that are top of mind for us as we plan for the future. The notion of wellness that goes beyond fitness, the growing importance of food and beverage, and technology innovation that drives a frictionless stay experience are among the key areas we're thinking through. We plan to implement thoughtful touchpoints across our brands to meet these new customer trends and others that will inevitably arise. Our brands are built to stand the test of time, but we'll continue to keep our pulse on the marketplace and adjust and refine as needed to meet our customers where they are.

**Sustainability and environmental responsibility are increasingly important factors for consumers. Brand Finance's research indicates that over half a billion dollars of Hilton's value is dependent on maintaining a reputation for a continued commitment to sustainability. Hilton is currently making positive steps towards your 2030 Goals and Travel With Purpose initiative. How have you managed to integrate this initiative across your portfolio and what steps have been taken to promote sustainable practices?**

Every brand in our portfolio plays an important part in our broader purpose to make the world a better place through hospitality. Nearly half of travelers surveyed in Hilton's 2023 Trends Report told us that they are looking to be immersed in local cultures while traveling through activities ranging from understanding local farm-to-table food sourcing to volunteering to support local organizations. This is especially true for meeting and event planners, where we have seen significant interest in our Meet with Purpose program that helps clients create meaningful connections to the communities they are visiting through volunteer experiences, local food and beverage immersions, and initiatives to help meeting planners reduce their overall environmental impact. We recognize that the success of our business and meeting these changing consumer demands are linked to our ability to operate and grow sustainably and have a holistic approach to reaching our environmental and social goals.





Rank  
**39** ↑

Brand Value  
**USD\$0.4 bn**  
+19%

Rank  
**4** ↓

Brand Strength  
**89.4**  
+0.5%



# Interview with Puneet Chhatwal.



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

**Congratulations! Taj Hotels brand has emerged to be the strongest brand in India for the second year running and thrice in last 4 years. Taj Hotels has always strived to move up the bar in the luxury guest experience. How has the brand continued to remain relevant in today's post-pandemic guest demands?**

Taj has always been at the forefront of curating novel and exceptional delights for its guests, and this is a trend that has only picked pace post the pandemic and reflects in our newest concepts like Loya - a restaurant brand that brings the culinary traditions of India's North to the fore, Seven Rivers - a one-of-a-kind microbrewery and J Wellness Circle - our holistic wellness offering. However, all of us at the Taj believe in going much beyond the material definition of luxury and crafting memorable moments that stay with our guests long after they leave. This is where we are guided by the Spirit of Tajness, which brings together our signature hospitality honed over a century, our legendary warmth and our sincere care for guests. With our commitment to creating highly personalised, awe-inspiring experiences, we have been able to create an invaluable bond with our guests, one that gives us a special place in their hearts, and one that truly sets us apart from any brand across industries.



**Innovation is crucial in any industry, including hospitality. How has Taj Hotels embraced innovation to enhance guest experiences, and how this has contributed to the brand's growth and reputation?**

The challenges we faced during the last few years acted as a catalyst for us in driving innovation and building a robust and dynamic hospitality ecosystem around Taj.

On one hand, we worked on creating a highly digital-driven experience for our guests with i-Zest and on the other hand we created brands like Qmin which brought us closer to our guests and allowed us to deliver a very diversified food & beverage experience.

We utilised the power of Metaverse to invite our guests virtually for our new launches and created a whole new set of stay experiences for our women guests with Woyage. Rendezvous, a set of ultra-exclusive events that we launched during the pandemic, has now become a very popular platform for our distinguished patrons to network and socialise.

Each of these innovations was driven by a very strong understanding of market trends, guest needs and our brand strategy, and has helped us capitalise on newer, emerging segments and enhance both our reach and revenues.

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

The primary drivers behind all our communication and brand campaigns are always our values and the everlasting relationship that we share with our patrons. We find our ground in the Trust placed in us by our stakeholders, our inspiration in the Awareness around global trends and our goal in the Joy that we set out to deliver to our patrons. Our Tata parentage and our Indian roots help us in crafting campaigns that resonate with our audience, both in India and globally, be it She Remains The Taj, which celebrates the multiple roles that women play in our journey, or Dekho Apna Desh, which invites our guests to explore India's picturesque destinations and cultural traditions with Taj.



**How has Taj Hotels integrated social responsibility and sustainable practices in Hospitality sector, especially when ESG has many dimensions and interpretations. How has the Taj Hotels approached sustainability initiatives into its brand strategy?**

Social responsibility and sustainable practices have been an inseparable part of the way we do things at Taj. Inspired by the vision of our founder Mr. J N Tata, who believed that serving the community is the very purpose of existence of any business, we launched Paathya, our holistic framework that goes well beyond the standard definition of ESG. As a result of our initiatives under Paathya, more than 50 Taj hotels are now EarthCheck certified, more than 30% energy used at our hotels comes from renewable sources, more than 40% of water is recycled, and over 300 EV charging stations have been set up at our hotels. We have also opened 16 skilling centres for the youth and marginalised segments across India with the help of our partners. In our endeavour to allow our guests to be at the forefront of and partake in our initiatives under Paathya, we recently launched Carecations – a set of curated travel itineraries that combine the joys of a meaningful vacation with a sense of purpose.

**Looking ahead, what future plans and strategies does Taj Hotels have in place to further strengthen its brand and continue the impressive growth of its brand value?**

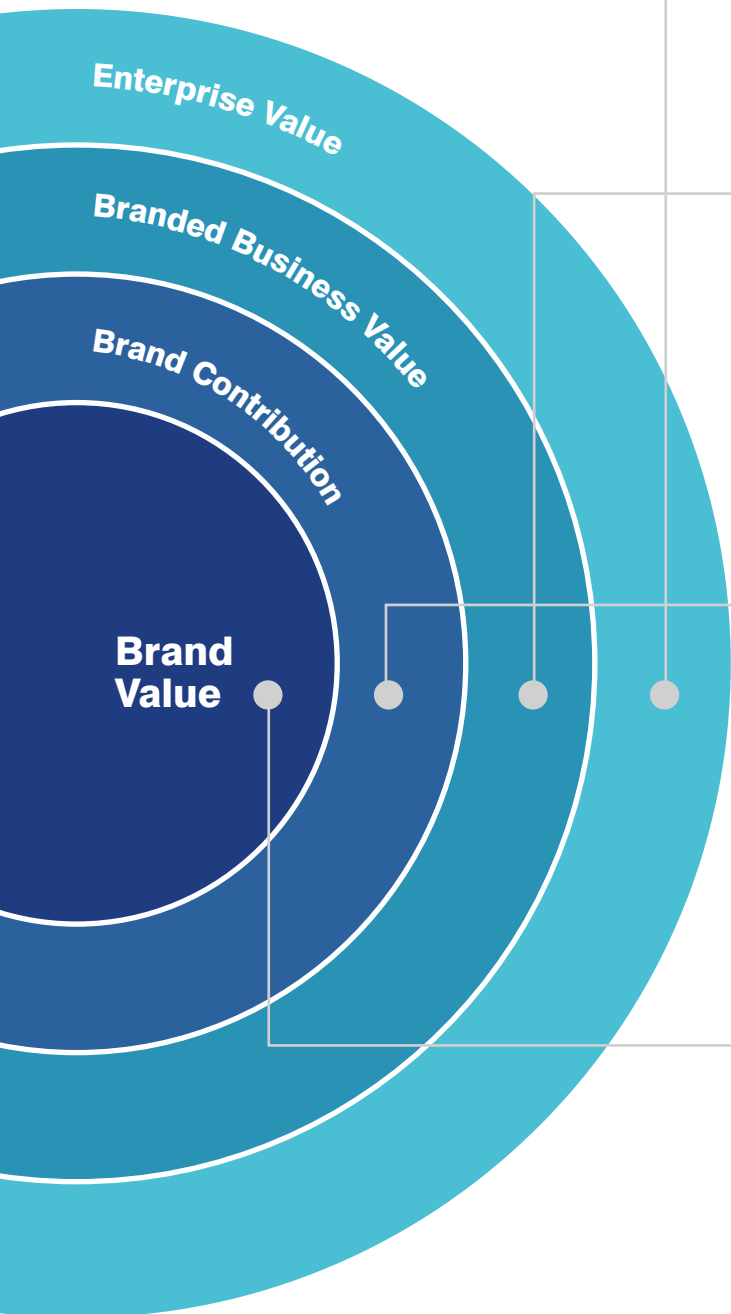
Under Ahvaan 2025, our roadmap to profitable growth, we have already been working on and implementing a very aggressive growth strategy for Taj, and in fact recently signed our 100<sup>th</sup> Taj hotel. Our aim is to unlock the true potential of India's numerous picture-perfect, tourism-friendly destinations with Taj, and this has reflected in our recent signings and openings of new Taj hotels in locations like Lakshadweep, Ayodhya, Ekta Nagar, Gandhinagar and even international destinations like Dhaka and Saudi Arabia. In order to complement our stay business, we have also strengthened Food & Beverage portfolio by introducing and refreshing marquee brands like Loya, Paper Moon, Seven Rivers, House of Nomad, House of Ming, Machan and Shamiana, and revamped our wellness portfolio with the introduction of brands like J Wellness Circle and niu&nau. With the introduction of NeuPass, the refreshed loyalty program on the Tata Neu app, we are now geared to harness the collective consumer reach and value potential of multiple Tata Group brands and are very well-placed for the next phase of our growth journey.





# Methodology.

# Definitions.



## Brand Value



[Meta]

### + 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'.



[Facebook]

### + 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.



[Facebook]

### + 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.



[Facebook]

### + 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.



### 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.

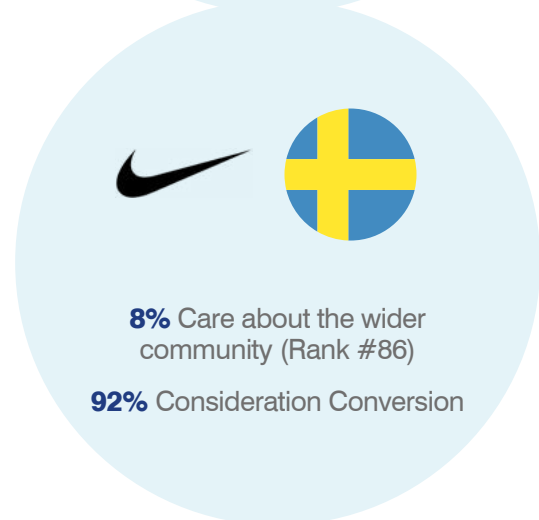
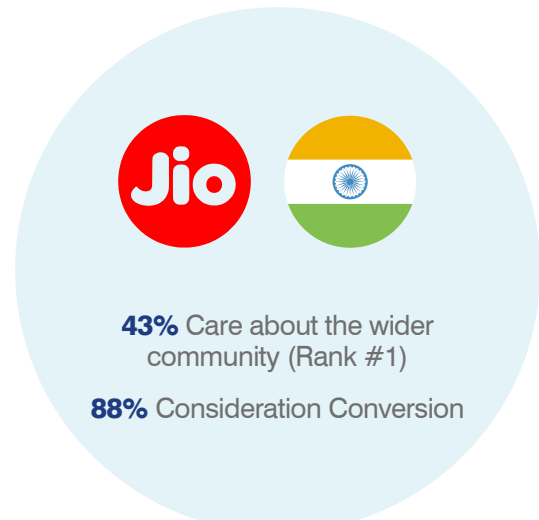
## Who's the coolest cat?

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 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)**

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

# Our Services.



# Consulting Services.

## Make branding decisions using hard data

### Brand Research

#### *What gets measured*

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

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



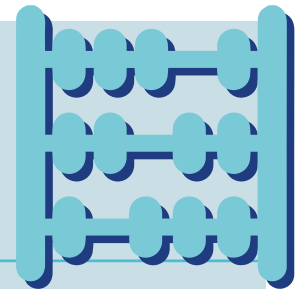
- + Are we building our brands' strength effectively?
- + How do I track and develop my brand equity?
- + How strong are my competitors' brands?
- + Are there any holes in my existing brand tracker?
- + What do different stakeholders think of my brand?

### Brand Valuation

#### *Make your brand's business case*

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

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



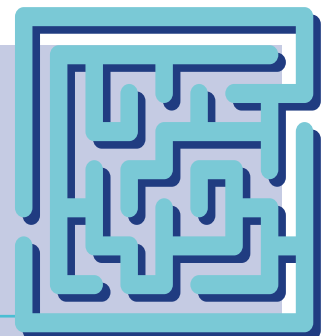
- + How much is my brand worth?
- + How much should I invest in marketing?
- + How much damage does brand misuse cause?
- + Am I tax compliant with the latest transfer pricing?
- + How do I unlock value in a brand acquisition?

### Brand Strategy

#### *Make branding decisions with your eyes wide open*

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

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



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

# Brand Evaluation Services.



## How are brands perceived in my category?

Brand Finance tracks brand fame and perceptions across over 38 markets in 31 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).

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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 Network.

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

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