



Kuwait 10 2023

The annual report on the most valuable and strongest Kuwait brands
February 2023

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About Brand Finance.

Brand Finance is the world's leading brand valuation consultancy.

We bridge the gap between marketing and finance

Brand Finance was set up in 1996 with the aim of 'bridging the gap between marketing and finance'. For more than 25 years, we have helped companies and organisations of all types to connect their brands to the bottom line.

We quantify the financial value of brands

We put thousands of the world's biggest brands to the test every year. Ranking brands across all sectors and countries, we publish over 100 reports annually.

We offer a unique combination of expertise

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

We pride ourselves on technical credibility

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

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



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Request your own Brand Value Report

A Brand Value Report provides a complete breakdown of the assumptions, data sources, and calculations used to arrive at your brand's value.

Each report includes expert recommendations for growing brand value to drive performance and offers a cost-effective way to gaining a better understanding of your position against peers.

Visit brandirectory.com/request-a-valuation
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Understanding

Benefits



Brand Valuation
Summary



Brand
Strength Tracking



Royalty Rates



Cost of
Capital Analysis



Customer
Research Findings



Competitor
Benchmarking

Contents

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

- + Browse thousands of published brand values
- + Track brand value, strength, and rating across publications and over time
- + Use interactive charts to compare brand values across countries, sectors, and global rankings
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Brand Finance Group.



Brand Finance
Institute

Brand Finance Institute

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

Brand Dialogue



Brand Dialogue

Brand Dialogue is a public relations agency developing communications strategies to create dialogue that drives brand value. Brand Dialogue has over 25 years of experience in delivering campaigns driven by research, measurement, and strategic thinking for a variety of clients, with a strong background in geographic branding, including supporting nation brands and brands with a geographical indication (GI). Brand Dialogue manages communications activities across Brand Finance Group's companies and network.

vi360

VI360

VI360 is a brand identity management consultancy working for clients of all sizes on brand compliance, brand transition, and brand identity management. VI360 provide straightforward and practical brand management that results in tangible benefits for your business.

Brand Finance®



Global Brand Equity Monitor

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

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

Foreword.



David Haigh
Chairman & CEO,
Brand Finance

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

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

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

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

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

Big Kuwaiti brands increase in value by 7%, with banking brands leading the growth.

- + **KPC** retains position as most valuable Kuwaiti brand, valued at US\$4.1 billion
- + **Kuwait Finance House** and **Boubyan** are fastest-growing Kuwaiti brands, up 31% and 33%
- + **Zain** is strongest Kuwaiti brand, earning AA+ rating
- + **Burgan Bank** is the newest entrant in 10th

Ranking Analysis.



Ranking Analysis.



KPC retains position as most valuable Kuwaiti brand, valued at US\$4.1 billion

KPC (brand value up 5% to US\$4.1 billion) continues its reign as the most valuable Kuwaiti brand. The nation's flagship petroleum company has achieved modest brand value growth in part due to its stature as a reliable supplier of petroleum products in the context of unstable global geopolitical conditions.

KPC, like many other oil companies, is responding to the challenges posed by the global transition to low-carbon energy solutions. To address these challenges, KPC has taken several steps to improve sustainability.

The Clean Fuels Project has been commissioned to produce low-sulfur fuels that meet Euro-5 standards and reduce carbon emissions. The first shipment of ultra-low-sulfur diesel has arrived at the terminal in Napoli and is available for purchase at Q8 service stations in Italy.

In addition, KPC is piloting a project to capture and inject CO₂ from its operations into reservoirs, which both removes carbon from the atmosphere and frees up natural gas for other uses. While the pilot project has demonstrated the feasibility of the technology, KPC faces significant costs to upgrade facilities, with significant technological advances needed to lower the cost of deployment.

Top 10 Most Valuable Kuwait Brands

© Brand Finance Plc 2023

1 ← 1  مؤسسة البترول الكويتية Kuwait Petroleum Corporation US\$4.1 bn +4.9%	2 ← 2  zain US\$2.7 bn +14.0%	3 ← 3  شركة نفط الكويت Kuwait Oil Company US\$2.0 bn +5.8%	4 ← 4  الوطني NBK US\$1.3 bn +5.9%	5 ← 5  بيت التمويل الكويتي Kuwait Finance House US\$1.2 bn +30.6%
6 ← 6  KNPC US\$0.8 bn +4.8%	7 ↑ 10  بنك بوبيان Boubyan Bank US\$0.3 bn +32.9%	8 ↓ 7  KUFPEC Kuwait Foreign Petroleum Exploration Company K.S.C.C. US\$0.2 bn +2.2%	9 ← 9  بنك الخليج GULF BANK US\$0.2 bn +4.3%	10 NEW  بنك بروتيان BURGAN BANK US\$0.2 bn +5.5%

Kuwait Finance House and Boubyan are fastest-growing Kuwaiti brands, up 31% and 33%

Kuwaiti banks Boubyan (brand value up 33% to US\$255 million) and **Kuwait Finance House** (brand value up 31% to US\$1.2 billion) are the fastest-growing Kuwaiti brands in the Kuwait 10 ranking this year.

Kuwait Finance House's brand value growth came in part due to the acquisition of Ahli United Bank in Bahrain, and increasingly being seen as a leader in the Islamic banking world. As part of this, the Kuwait Finance House has been named the Best Islamic Financial Institution in the World and in the Middle East by Global Finance Magazine.

Further, the Kuwait Finance House is the largest listed company on the Bursa Kuwait stock exchange and is now also listed on the Bahrain stock exchange, giving it easier access to capital and making it more accessible to investors. Continuing to bolster its brand image, Kuwait Finance House is becoming increasingly known for its community, relief and humanitarian

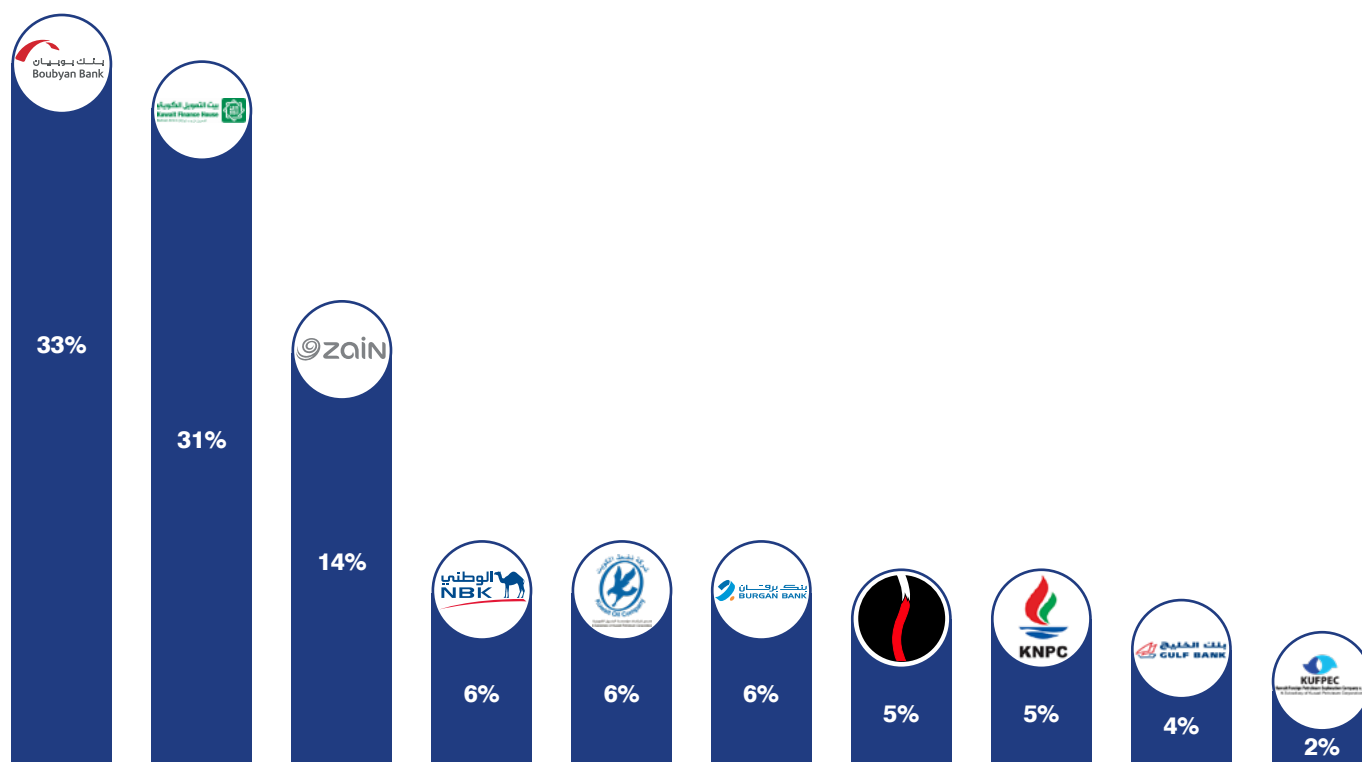
initiatives both inside and outside of Kuwait. This includes restoring the ancient market of Al-Mubarakiya, and participating in various social campaigns with the Kuwaiti Red Crescent.

The Boubyan brand is intensely focused on using technology developments to build its brand and business to government, corporate and consumer customers. It has launched several first-to-market innovations, including PayMe, which has become a popular service in Kuwait.

The bank does face some challenges, such as ensuring interoperability; accommodating customers who may struggle to keep up with innovation; protecting customer privacy; reducing financial crime and fraud; and ensuring legal compliance. In response to these challenges, Boubyan Bank recently launched Nomo Bank, the first Islamic digital bank in Kuwait and the UK. Nomo offers a digital-first banking experience with quick and easy access to UK-based bank accounts through a smartphone app, 24/7 access, and investment opportunities not typically available to non-UK residents.

Brand Value Change 2022-2023 (%)

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Zain is strongest Kuwaiti brand, earning AA+ 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 150,000 respondents in 38 countries and across 31 sectors.

By these metrics, **Zain** (brand value up 14% to US\$2.7 billion) was found to have the strongest brand in the Kuwaiti ranking with its brand strength score of 78/100 and brand rating of AA+, maintaining its score from last year. Meanwhile, last year's strongest brand, **NBK** (brand value up 6% to US\$1.3 billion) suffered from a marginal reduction in its brand strength to fall from just ahead of Zain to now be ranked just behind. Zain added 3.5 million active subscribers this year, and now serve a total of 52 million customers, a 7% increase from the previous year. Zain has been particularly boosted in the business-to-business market with

strong enterprise revenue growth and acquisition of extra cloud-related services such as BIOS Middle East. These developments are reflective of Zain's strong brand, which they are continuing to leverage to consumers, with the launch of fibre-to-the-room and 5G technology, improving speeds and connectivity to user. In addition it has been focussing on Corporate Sustainability; Diversity, Equity and Inclusion initiatives and innovation as evidenced by its investment (US\$ 1 billion annually) in digital technologies.

Burgan Bank is the newest entrant in 10th

Burgan Bank (brand value up 6% to US\$189 million) is the newest entrant in 10th on the back of strong performance in retail banking and growing client acquisitions. It is one of the largest conventional banks in the country with a strong presence in corporate banking. There is a key focus to strengthen the corporate banking segment while growing the Retail banking segment by embedding ESG across the business through digital transformation to deliver superior customer experience.

Top 10 Strongest Kuwait Brands

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1 2 78.1 +0.6 AA+	2 1 77.4 -0.8 AA+	3 4 74.0 +7.9 AA	4 3 67.8 - AA-	5 7 65.9 +2.4 AA-
6 5 65.0 -0.9 AA-	7 9 58.9 +0.4 A	8 8 58.7 +0.1 A	9 NEW 57.8 -2.1 A	10 10 51.2 -0.6 A-

Brand Value Ranking (USDm).

Top 10 most valuable Kuwait brands 1-10

2023 Rank	2022 Rank		Brand	Sector	2023 Brand Value	Brand Value Change	2022 Brand Value	2023 Brand Rating	2022 Brand Rating
1	1	←	KPC	Oil & Gas	\$4,150	+4.9%	\$3,956	AA-	A+
2	2	←	Zain	Telecoms	\$2,736	+14.0%	\$2,401	AA+	AA+
3	3	←	KOC	Oil & Gas	\$1,999	+5.8%	\$1,890	A	A
4	4	←	NBK	Banking	\$1,296	+5.9%	\$1,224	AA+	AA+
5	5	←	Kuwait Finance House	Banking	\$1,222	+30.6%	\$936	AA	AA-
6	6	←	KNPC	Oil & Gas	\$753	+4.8%	\$718	A	A
7	10	↑	Boubyan	Banking	\$255	+32.9%	\$192	AA-	AA-
8	7	↓	Kuwait Foreign Petroleum Exploration Company	Oil & Gas	\$248	+2.2%	\$243	A-	A-
9	9	←	Gulf Bank	Banking	\$208	+4.3%	\$199	AA-	AA-
10	-	New	Burgan Bank	Banking	\$189	+5.5%	\$180	A	A+



Brand Spotlights.





Rank

2 ←

Brand Value

US\$2.7 bn
+14.0%

Rank

1 ↑

Brand Strength

78.1
+0.6

Interview with Bader Al Kharafi.



Bader Al Kharafi,
Zain Vice-Chairman
& Group CEO

Zain is now the strongest brand in Kuwait, what are the key strengths you have developed over time to be able to achieve this?

This year, the Zain brand will celebrate its 16th anniversary as one of the most recognizable and loved brands in Kuwait and across the MENA region, not only in telecom but across all industries. The Zain brand is positioned to be simple, memorable, and easy to pronounce across the global markets. In Arabic, Zain means 'beautiful', 'good' or 'wonderful' and it is at the heart of everything we do. It is a promise to our customers, it defines our vision and drives our focus within the company.

As the region's only holistic telecom brand in all seven markets, we spend anywhere between US\$ 60 to \$80 million annually in marketing campaigns across various traditional and digital media channels. Zain's 2022 Ramadan and EID TVCs alone witnessed 200 million views on YouTube, given the impactful concepts of the TVCs. Apart from employing high calibre creative talents, Zain partners with and utilizes the best creative digital agencies across the region to ensure the Zain brand is loved by all peoples of the region and afar.

The brand's remarkable recognition some 16 years after rebranding from MTC and other country specific brands across our footprint, is testament to the investment Zain places not only in its brand, but more importantly the focus on Corporate Sustainability; Diversity, Equity and Inclusion initiatives; and its ongoing innovation and investment (US\$ 1 billion annually) in digital technologies and network upgrades that result in 52 million customers receiving an exceptional telecom experience, making it one of the most respected and recognized corporate brands in the region.

Zain is renowned for its group-wide Sustainability and Diversity, Equity and Inclusion (DEI) programs that have it earned praise from reputable global organizations. What's driving this focus?

As part of its '4Sight' strategy, Zain is proactively embedding its shared values into its DNA to drive our business, sustainability, and DEI agenda, enriching our purpose for being as an organization.



Zain has transitioned the business to advance its sustainability agenda unlocking many opportunities that the UN's SDGs offer. We are guided by the four pillars of the company's five-year corporate sustainability strategy, centered on Climate Change, Social Business, Inclusion, and Generation Youth.

We have been one of the most active and vocal telecom operators in the region with regards to climate change actions, as we wholeheartedly believe protection of our environment should be a key priority for every organization and individual on the planet.

Notably, the A- score that Zain maintained in the latest 'CDP Score Report–Climate Change 2022', positioned us first in the region and among leaders globally with respect to climate control initiatives. We have recently committed to setting emissions targets in line with the Science-Based Targets initiative (SBTi) guidance to halve our carbon emissions before 2030 and achieve Net-Zero by 2050, highlighting our determination to foster sustainable systemic change and provide meaningful connectivity by integrating technologies to generate safe energy to help reduce global warming.

We also joined the United Nations (UN) Global Compact initiative — a voluntary leadership

platform for the development, implementation, and disclosure of responsible business practices. With this announcement, Zain proudly united with thousands of other companies globally, and a select few telcos from the Middle East, in making this commitment to take responsible business action to create the world we all want.

Markedly, our focus on nurturing a diverse, equitable and inclusive (DEI) work culture through a series of programs and initiatives has become a key part of the fabric of the company, transforming how we hire, plan for succession, support and develop our people, which all work towards positively contributing to a vibrant, productive, and inclusive culture.

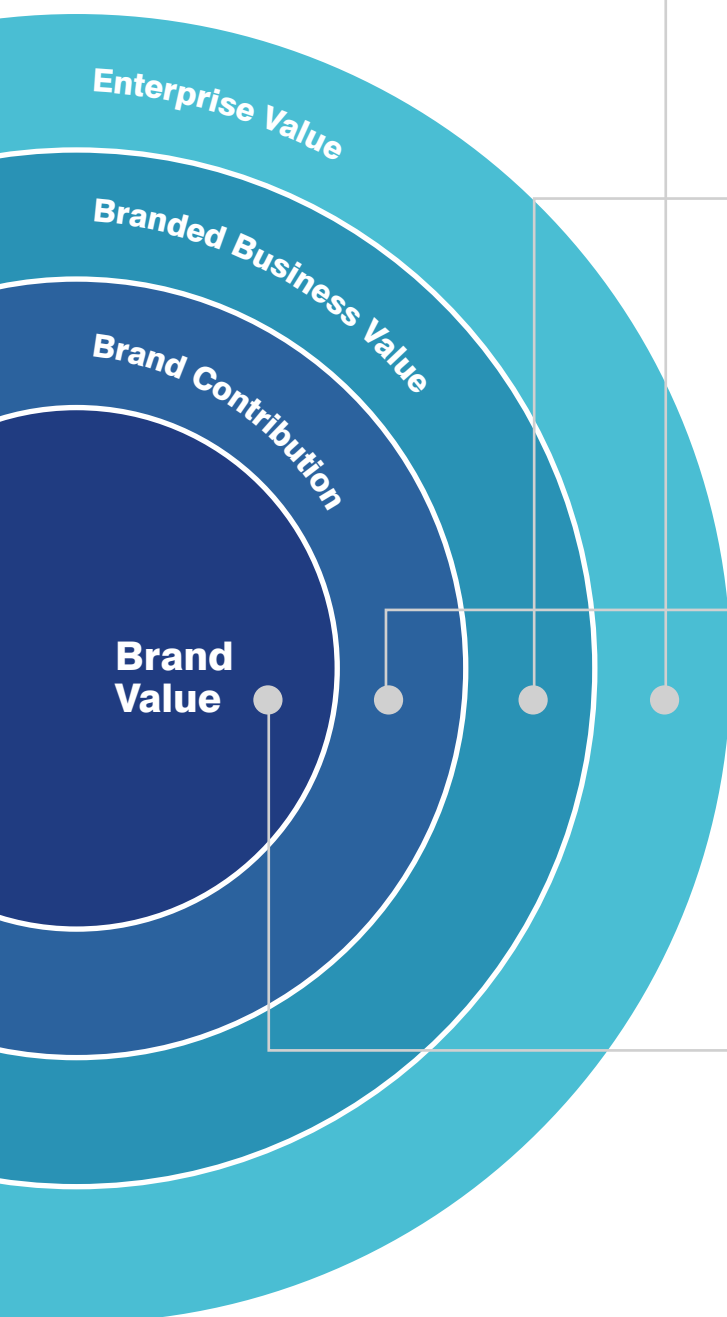
These efforts resulted in Zain being identified as the Best Employer in Kuwait as well as one of the top-10 employers across the Middle East by Forbes magazine. Additionally, Zain was recognized as having the Best Diversity, Equity and Inclusion strategy in the Middle East at Informa's Future Workplace Awards 2022, where Zain also won the award for Best Women Development & Leadership Program, solidifying the company's reputation as being one of the most exciting, progressive, and inclusive companies to work for.





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'.



[7 Days]

+ 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.



[7 Days]

+ 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.



[7 Days]

+ 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.

1



Brand Impact

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

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

2

Brand Strength

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



Each brand is assigned a Brand Strength Index (BSI) score out of 100, which feeds into the brand value calculation. Based on the score, each brand is assigned a corresponding Brand Rating up to AAA+ in a format similar to a credit rating.

3



Brand Impact × Brand Strength

The BSI score is applied to the royalty range to arrive at a royalty rate. For example, if the royalty range in a sector is 0-5% and a brand has a BSI score of 80 out of 100, then an appropriate royalty rate for the use of this brand in the given sector will be 4%.

Forecast Brand Value Calculation

4

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



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

Brand Strength.

Brand Strength

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

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



1 Attribute Selection and Weighting

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

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

2

Data Collection

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

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

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



3 Benchmarking and Final Scoring

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











Each brand is assigned a Brand Strength Index (BSI) score out of 100, which feeds into the brand value calculation. Based on the score, each brand is assigned a corresponding rating up to AAA+ in a format similar to a credit rating.

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











Global Brand Equity Monitor.

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

Tier 1

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

Tier 2

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



Brand KPIs and Diagnostics

1. Brand Funnel



Awareness

Have heard of your brand

Familiarity

Know something about your brand

Consideration

Would consider buying/using your brand

2. Brand Usage

3. Quality

4. Reputation

5. Loyalty

6. Closeness

7. Recommendation (NPS)

8. Word of Mouth

9. Brand Imagery

10. Branding Influence

11. Brand Momentum

Highlights from the Global Brand Equity Monitor.

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

What makes a brand great?

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

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

Does brand purpose deliver?

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

Who's the coolest cat?

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

Selected Rankings for Amazon – All Non-Luxury Brands

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

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

88% Consideration Conversion



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

92% Consideration Conversion

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

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

Get your brand talked-about

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

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



Top-ranked brands for being “Cool” (Among Category Users)

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	1 st	2 nd	3 rd
	  PORSCHE	Jeep	
	 Levi's®		
	 CONVERSE		 PORSCHE
	 HARLEY-DAVIDSON	 PORSCHE	 UNDER ARMOUR

Our Services.



Consulting Services.

Make branding decisions using hard data

Brand Research

What gets measured

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

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

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



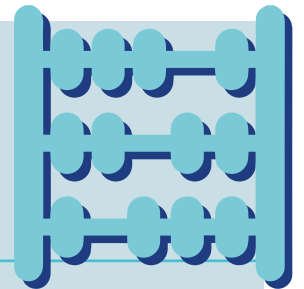
Brand Valuation

Make your brand's business case

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

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

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



Brand Strategy

Make branding decisions with your eyes wide open

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

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

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



Brand Evaluation Services.



How are brands perceived in my category?

Brand Finance tracks brand fame and perceptions across 30 markets in 10 consumer categories. Clear, insightful signals of brand performance, with data mining options for those who want to dig deeper – all at an accessible price.

What if I need more depth or coverage of a more specialised sector?

Our bespoke brand scorecards help with market planning and can be designed to track multiple brands over time, against competitors, between market segments and against budgets. Our 30-country database of brand KPIs enables us to benchmark performance appropriately.

Do I have the right brand architecture or strategy in place?

Research is conducted in addition to strategic analysis to provide a robust understanding of the current positioning. The effectiveness of alternative architectures is tested through drivers analysis, to determine which option(s) will stimulate the most favourable customer behaviour and financial results.

How can I improve return on marketing investment?

Using sophisticated analytics, we have a proven track record of developing comprehensive brand scorecard and brand investment frameworks to improve return on marketing investment.

What about the social dimension? Does my brand get talked about?

Social interactions have a proven commercial impact on brands. We measure actual brand conversation and advocacy, both real-world word of mouth and online buzz and sentiment, by combining traditional survey measures with best-in-class social listening.

Brand Dialogue[®]



With strategic planning and creative thinking, we develop communications plans to create dialogue with stakeholders that drives brand value.

Our approach is integrated, employing tailored solutions for our clients across PR and marketing activations, to deliver strategic campaigns, helping us to establish and sustain strong client relationships. We also have a specific focus on geographic branding, including supporting nation brands and brands with a geographical indication (GI).

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



Research, Strategy & Measurement

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



Public Relations & Communications

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



Marketing & Events

Promotional Events
Conference Management
Native Advertising
Retail Marketing



Content Creation

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



Strategic Communications

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



Brand Finance Network.

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

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