



UK 250 2023

The annual report on the most valuable and strongest British brands
May 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 branddirectory.com/request-a-valuation
or email enquiries@brandfinance.com



Insight



Strategy



Benchmarking



Education



Communication



Understanding

Benefits



Brand Valuation
Summary



Brand
Strength Tracking



Royalty Rates



Cost of
Capital Analysis



Customer
Research Findings



Competitor
Benchmarking

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

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

Visit brandirectory.com to find out more.

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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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.

Shell powers on as UK's most valuable brand and Dettol wipes the floor as strongest.

- + **Shell** is most valuable British brand, valued at £40.1 billion and **Land Rover** takes a back seat
- + **Utility Warehouse** is fastest-growing British brand, more than doubling in value to £364.4 million
- + Britain's brands transition to abbreviated branding
- + **Dettol** cleans up as strongest British brand, earning AAA+ rating and **Greggs** is on a roll with AAA rating
- + **The Body Shop** has highest Sustainability Perceptions Score, rated 6.83 out of 10

Ranking Analysis.



Ranking Analysis.



Shell is most valuable British brand, valued at £40.1 billion and Land Rover takes a back seat

Shell (brand value up 10% to £40.1 billion) holds on to its position as the most valuable British brand. Shell has taken a global leadership role in helping customers divest from Russia in the wake of Russia's invasion of Ukraine and helped provide some degree of energy security to Europe.

Every year, leading brand valuation consultancy Brand Finance puts 5,000 of the biggest brands to the test, and publishes over 100 reports, ranking brands across all sectors and countries. The world's top 250 most valuable and strongest British brands are included in the annual Brand Finance UK 250 2023 ranking.

Shell has benefited from increased prices for hydrocarbons, following a year of disrupted gas





















supplies and increased demand for oil as global economies headed towards normality after the Covid-19 pandemic

Future outlook remains positive as the appointment of a new CEO, Wael Sawan, in January 2023, and a subsequent renewed strategy geared towards catering to increased Oil & Gas demand has provided a more positive outlook for investor returns. However, such a move provides a reputational risk, Brand Finance estimates that the Sustainability Perception Value to Shell is £3bn via its inaugural Sustainability Perceptions Index.

On the other hand, **Land Rover** (brand value £6.0 billion) took a hit, falling 17% since its 2022 rating. Throughout 2022, Land Rover retail sales were constrained by global semiconductor shortages. Overall retail sales and revenue for FY2021/22 were down, resulting in reduced brand value.

Top 10 Most Valuable British Brands

© Brand Finance Plc 2023

1 ← 1   £40.1 bn +10%	2 ← 2   £21.4 bn +26%	3 New   £21.1 bn +24%	4 ↑ 5   £16.5 bn +25%	5 ↓ 3   £14.0 bn -2%
6 ↓ 4   £13.9 bn +0%	7 New   £12.3 bn +31%	8 ↓ 6   £11.8 bn +24%	9 ↓ 8   £10.3 bn +26%	10 ↓ 7   £8.6 bn -1%

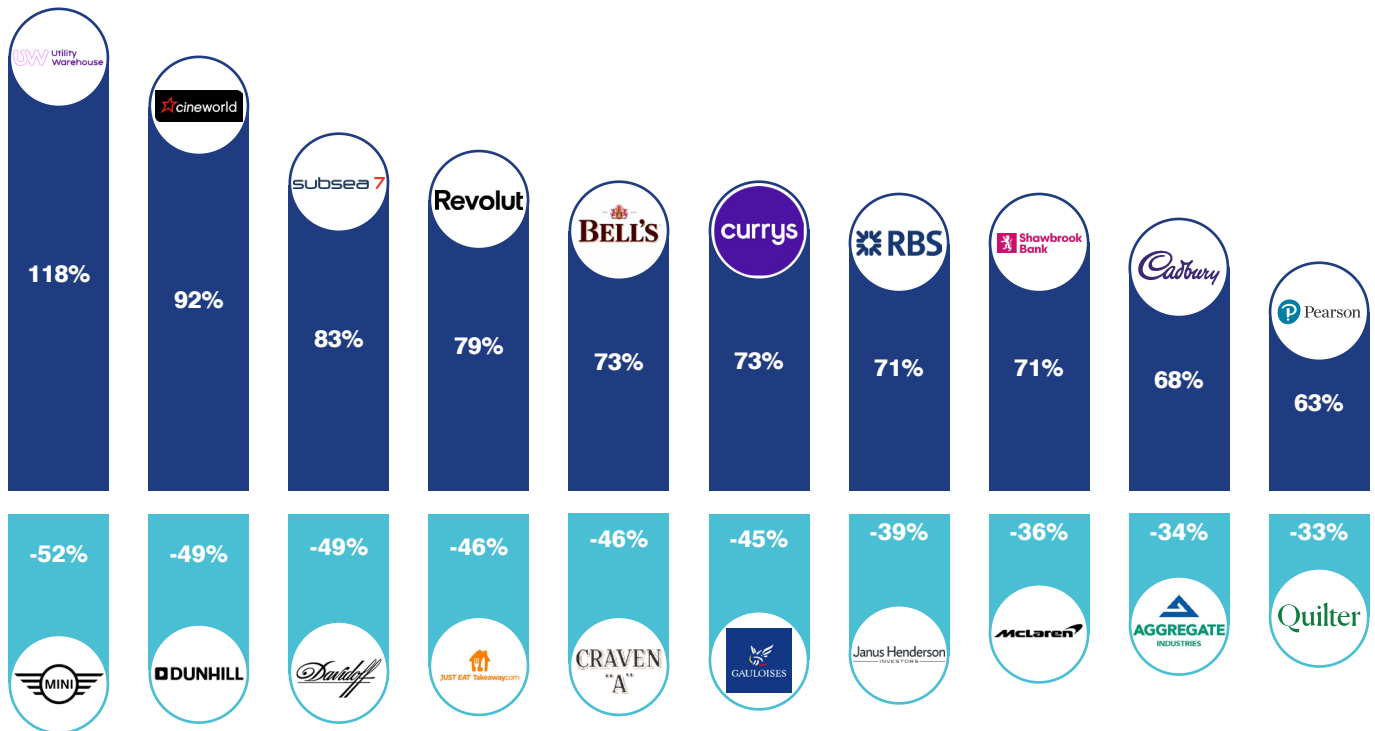
To demonstrate the performance of a wider pool of British brands, Brand Finance has chosen to expand our 2023 ranking to the Top 250 UK brands. Notable challenger brands from all sectors entering the ranks such as Revolut and Fever-Tree showcase the importance of targeted marketing and consumer perceptions for up-and-coming brands.

Annie Brown
UK General Manager of Brand Finance



Brand Value Change 2023-2022 (%)

© Brand Finance Plc 2023



Utility Warehouse is fastest-growing British brand, more than doubling in value to £364.4 million

Utility Warehouse (trading name of **Telecom Plus**) saw significant brand value growth this past year, increasing 118% to £364.4 million. The brand's value growth has been largely driven by its structural cost advantage. Despite rising wholesale energy costs, Utility Warehouse's unique multi-utility solution has provided an advantage point over competitors. Now operating in a much smaller market, Utility Warehouse's resilient business model has benefited from multiple avenues of revenue whilst maintaining reduced overhead costs.

The brand's word-of-mouth strategy is also a contributor towards brand value growth. Utility Warehouse's community of customers grew 10% in the first half of 2022, the same amount of total growth seen by the brand for the 5 years before.

Looking ahead, the first half of 2023 saw a further 24% increase in annualised customer growth. The brand's genuine alignment of interests with its customers has, over time, improved overall brand awareness.

Alternatively, **MINI** (brand value £1.3 billion) dropped 35 places (52%) in Brand Finance's UK 250 2023 brand value ranking. The MINI brand saw a 14-point drop in its Brand Strength Index (BSI) score.

MINI has continued to face supply-chain constraints, described by the brand as a direct consequence of the geopolitical situation in Ukraine. The global shortage of semiconductors has forced MINI, alongside its peers, to simplify its product offering. During this time, MINI's temporary transition to an automatic-only fleet means the brand has not been able to deliver on pre-existing manual orders. Back in 2021, MINI announced its electric vehicle production was to relocate at the start of 2023. For the first time, iconic British MINI cars will be made in China rather than at its flagship Oxford assembly factory. MINI's closure of its Oxford factory and resulting cuts to its workforce has also negatively impacted overall stakeholder perceptions of the brand.

The closure and MINI's pause on its manual car production leaves a question mark as to its British built future, and whether or not its entire production moves East. The future of MINI and its return to brand value growth in 2024 will also be determined by its ability to recover from and prevent further production delays.

Britain's brands transition to abbreviated branding

Brand Finance's ranking reflects the steadily increased prominence of acronym branding. Of the top 100 most valuable British brands, 20 are acronyms. Of the top 10, half - **EY**, **PWC**, **HSBC**, **BP**, and **KPMG**. Further into the ranking we see iconic brands such as **BT**, **BBC**, **GSK**, which are all examples of iconic brands which have moved to their abbreviated acronym version in their relatively recent history. New examples over the past year include **LSEG** (previously the London Stock Exchange Group), **WTW** (previously Willis Towers Watson), and more recently the corporate brand **JLR** (previously Jaguar Land Rover).

To understand the potential value uplift or value loss of a rebrand or name abbreviation, get in touch with our team.

LSEG (London Stock Exchange Group) ranks 17th as a new entrant to Brand Finance's ranking (brand value £5.2 billion). In 2021, LSEG completed its acquisition of Refinitiv which aims to create significant value and help reshape the industry. Following the acquisition, in 2022, LSEG and Microsoft announced a ten-year strategic partnership. The goal of this partnership is to further transform LSEG's consumer experience. LSEG is a reputable and established player in the financial industry. The brand has been able to increase revenues and improve its overall share price, despite recent market conditions.

In 2022, the abbreviated branding transition of Willis Tower Watson saw it become **WTW** (brand value £2.1 billion). CEO, Carl Hess, sees WTW's rebrand as a celebration of its rich history. WTW used to represent the names of its predecessor business and its new brand strategy aims to present the brand as a unified entity.

In April 2023, (Jaguar) **Land Rover** (brand value £6.0 billion) announced its new brand strategy, officially becoming **JLR**. The transition to abbreviated branding will see Defender, Discovery, Range Rover and Jaguar evolve into distinctive sub-brands. JLR insists the "House of Brands" strategy does not signify the loss of the Land Rover spirit but aims to focus consumers on each of the four brands independently. JLR's goal is to provide clarity to its consumers, which is essential to the luxury automotive industry.

This may see JLR return to brand value growth in 2024. However, the rebrand could risk value destruction by side-lining one of the most evocative brands in the automotive business. Future success and overall brand value of the JLR brand and its sub-brands will hinge on how the brand transitions are implemented.

We appear to be an island that is increasingly fond of initials in lieu of full names. Our identity itself as United Kingdom or Great Britain is regularly initialised to UK or GB, as it is in the title of this report. While many of the observed brands such as the BBC are arguably stronger for their initialisation, there is some risk in brand value destruction from brand abbreviation. To be recognisable, abbreviated brand names should be meaningful. Brands choosing to transition to abbreviated branding must have a clear rationale and financial value-based strategy for doing so.

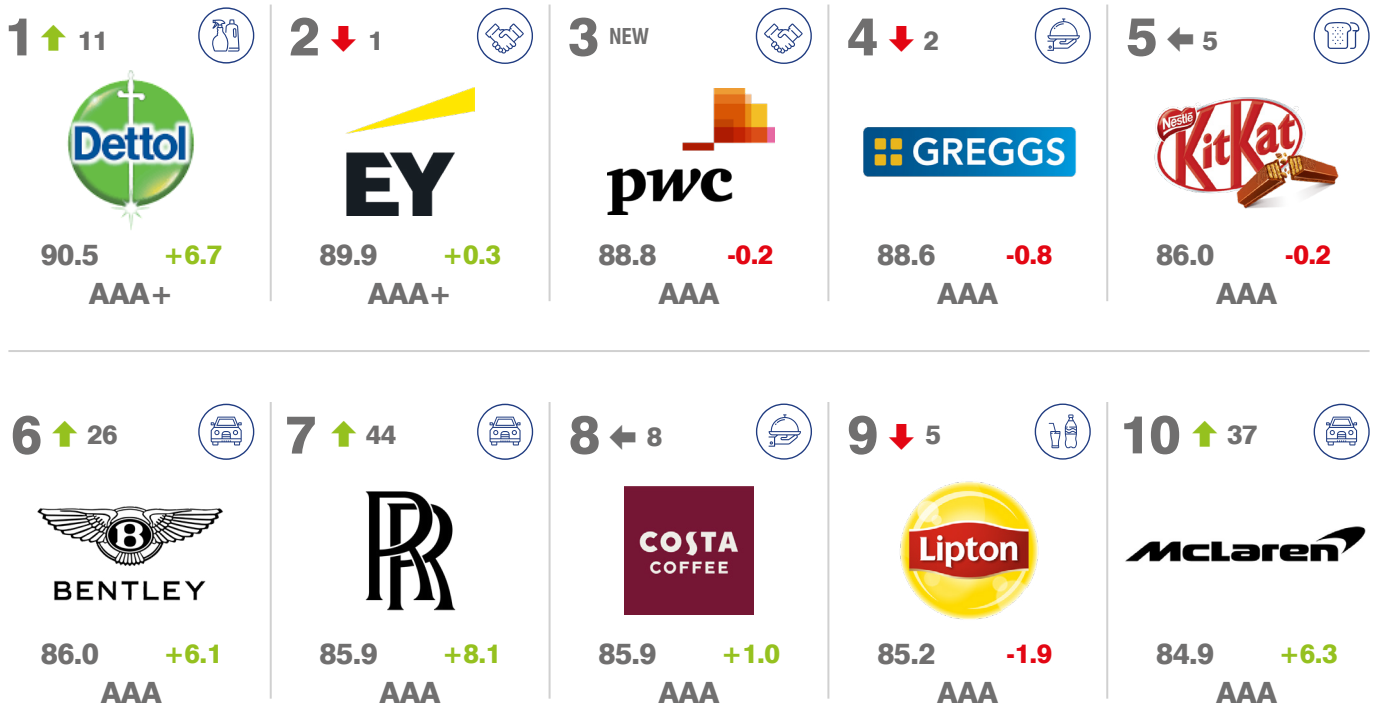
Annie Brown

UK General Manager of Brand Finance



Top 10 Strongest British Brands

© Brand Finance Plc 2023



Dettol cleans up as strongest British brand, earning AAA+ rating and Greggs is on a roll with 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.

Dettol (brand value up 54% to £1.3 billion) is a popular choice for household and commercial use, earning it a Brand Strength Index (BSI) score of 90.5 out of 100. Dettol's resulting AAA+ rating is the highest rating awarded by Brand Finance.

Consumers recognise Dettol for its effectiveness in killing germs and preventing infection spread. Post-pandemic, awareness around hygiene and health has risen and consumers appear to trust Dettol. Dettol benefits from consumer willingness to pay more for its products compared to off-brand alternatives.



Supermarket own brands could save consumers upwards of £1 per product but with perceived technological superiority, Dettol achieves a price premium. Therefore, the strength of Dettol's brand and perception, built up over long term marketing and campaigns, facilitate significant financial return.

Greggs (brand value up 32% to £850 million) is the UK's 4th strongest brand. Greggs is a UK consumer favourite for affordable food-on-the-go, maintaining its AAA rating with a BSI of 88.6 out of 100. Despite being pushed to increase its prices to offset higher wages,

manufacturing and supply costs, the Greggs brand remains strong in the eyes of consumers.

The World's strongest brands have the ability to drive business value expansion in and out of their core category. The strength of the Greggs brand was exhibited in its 2022 fashion collaboration with **Primark**. The collaboration has further solidified brand strength. The marketing campaign has been well-set up for positive word of mouth and increased brand awareness. Greggs remains resilient and is also found to be the strongest brand in the Brand Finance Restaurant 25 2023 ranking.



The Body Shop has highest Sustainability Perceptions Score, rated 6.83 out of 10

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

The Body Shop is an iconic British brand known for its commitment to ethical and sustainable practices, achieving a Sustainability Perceptions Score of 6.83 out of 10. This is the highest of any brand included in the UK 250 2023 ranking. Having attained B Corp™

status in 2019, the brand is perceived to have met the highest verified standards of social and environmental performance, transparency, and accountability.

The Body Shop empowers its consumers to contribute towards its mission for a circular economy, where its products are reused, recycled and the affected nature is regenerated. The Body Shop has invited its consumers to the refill revolution since 1976. Originally, the idea of repurposing and refilling pre-used The Body Shop packaging was a solution for packaging shortages. Today, the brand's ongoing "Refill Scheme" could reduce plastic waste by more than 25 tonnes per year by the end of 2023.

The Body Shop's pioneering approach to long-term sustainability is described as a "Commitment to Life", positively contributing towards overall consumer perceptions.



Brand Value Ranking (GBPm).

Top 250 most valuable British 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	←	Shell	Oil & Gas	40,094	+10%	36,516	AA+	AAA-
2	2	←	EY	Commercial Services	21,374	+26%	17,003	AAA+	AAA+
3	-	New	PWC	Commercial Services	21,068	+24%	16,946	AAA	AAA
4	5	↑	HSBC	Banking	16,509	+25%	13,168	AA	AA
5	3	↓	Vodafone	Telecoms	14,021	-2%	14,266	AA	AA
6	4	↓	BP	Oil & Gas	13,851	-0%	13,897	A+	AA
7	-	New	KPMG	Commercial Services	12,323	+31%	9,436	AAA-	AAA-
8	6	↓	Tesco	Retail	11,802	+24%	9,494	AAA-	AAA-
9	8	↓	Barclays	Banking	10,299	+26%	8,198	AA-	A+
10	7	↓	Sky	Telecoms	8,631	-1%	8,744	AA+	AAA-
11	10	↓	Asda	Retail					
12	12	←	Standard Chartered	Banking					
13	16	↑	NatWest	Banking					
14	9	↓	Land Rover	Automobiles					
15	14	↓	3	Telecoms					
16	13	↓	Lloyds Bank	Banking					
17	-	New	LSEG	Commercial Services					
18	17	↓	AstraZeneca	Pharma					
19	19	←	O2	Telecoms					
20	18	↓	Sainsbury's	Retail					
21	22	↑	JD Sports	Retail					
22	11	↓	Aviva	Insurance					
23	21	↓	BAE Systems	Aerospace & Defence					
24	15	↓	BT	Telecoms					
25	23	↓	Burberry	Apparel					
26	28	↑	BBC	Media					
27	27	←	bet365	Leisure & Tourism					
28	49	↑	Cadbury	Food					
29	29	←	Morrisons	Retail					
30	25	↓	GSK	Pharma					
31	36	↑	Compass Group	Commercial Services					
32	38	↑	Boots	Retail					
33	31	↓	Unilever	Food					
34	37	↑	Rio Tinto	Mining, Metals & Minerals					
35	43	↑	Aon	Insurance					
36	35	↓	Rothmans	Tobacco					
37	45	↑	Nationwide Building Society	Banking					
38	48	↑	Johnnie Walker	Spirits					
39	39	←	Lipton	Soft Drinks					
40	34	↓	EE	Telecoms					
41	40	↓	Marks & Spencer	Retail					
42	51	↑	Virgin Media	Telecoms					
43	50	↑	Bentley	Automobiles					
44	41	↓	Rolls-Royce (Aerospace & Defence)	Aerospace & Defence					
45	42	↓	Halifax	Banking					
46	26	↓	Legal & General	Insurance					
47	44	↓	WTW	Commercial Services					
48	56	↑	The Co-operative	Retail					
49	30	↓	ITV	Media					
50	46	↓	BUPA	Insurance					

Top 250 most valuable British brands 51-100

2023 Rank	2022 Rank		Brand	Sector	2023 Brand Value	Brand Value Change	2022 Brand Value	2023 Brand Rating	2022 Brand Rating
51	52	▲	Openreach	Telecoms	£	£	£	£	£
52	57	▲	British Airways	Airlines	£	£	£	£	£
53	24	▼	Just Eat Takeaway.com	Logistics	£	£	£	£	£
54	61	▲	Anglo American	Mining, Metals & Minerals	£	£	£	£	£
55	54	▼	Scottish Widows	Insurance	£	£	£	£	£
56	62	▲	B&M	Retail	£	£	£	£	£
57	80	▲	Rolls- Royce	Automobiles	£	£	£	£	£
58	-	New	Enfamil	Food	£	£	£	£	£
59	63	▲	Deliveroo	Logistics	£	£	£	£	£
60	70	▲	John Lewis	Retail	£	£	£	£	£
61	64	▲	National Grid	Utilities	£	£	£	£	£
62	47	▼	Jaguar	Automobiles	£	£	£	£	£
63	66	▲	LexisNexis	Commercial Services	£	£	£	£	£
64	81	▲	Penguin	Media	£	£	£	£	£
65	86	▲	Twinings	Soft Drinks	£	£	£	£	£
66	73	▲	Bunzl	Logistics	£	£	£	£	£
67	67	◀	Smith & Nephew	Pharma	£	£	£	£	£
68	32	▼	MINI	Automobiles	£	£	£	£	£
69	58	▼	Next	Apparel	£	£	£	£	£
70	72	▲	Hanson	Engineering & Construction	£	£	£	£	£
71	60	▼	BrewDog	Beers	£	£	£	£	£
72	100	▲	Dettol	Household Products	£	£	£	£	£
73	107	▲	Pearson	Media	£	£	£	£	£
74	87	▲	Easyjet	Airlines	£	£	£	£	£
75	75	◀	INEOS	Chemicals	£	£	£	£	£
76	84	▲	Elsevier	Commercial Services	£	£	£	£	£
77	92	▲	William Hill	Leisure & Tourism	£	£	£	£	£
78	96	▲	Dulux	Conglomerates	£	£	£	£	£
79	102	▲	Rentokil	Commercial Services	£	£	£	£	£
80	69	▼	Tate & Lyle	Food	£	£	£	£	£
81	79	▼	RSA	Insurance	£	£	£	£	£
82	74	▼	Travis Perkins	Retail	£	£	£	£	£
83	68	▼	Costa	Restaurants	£	£	£	£	£
84	77	▼	Sports Direct	Retail	£	£	£	£	£
85	59	▼	ASOS	Retail	£	£	£	£	£
86	78	▼	Intercontinental	Hotels	£	£	£	£	£
87	85	▼	B&Q	Retail	£	£	£	£	£
88	101	▲	Informa	Commercial Services	£	£	£	£	£
89	105	▲	DS Smith	Engineering & Construction	£	£	£	£	£
90	95	▲	Barratt Developments	Engineering & Construction	£	£	£	£	£
91	133	▲	Prudential	Insurance	£	£	£	£	£
92	82	▼	Schroders	Banking	£	£	£	£	£
93	97	▲	Johnson Matthey	Chemicals	£	£	£	£	£
94	98	▲	SSE	Utilities	£	£	£	£	£
95	53	▼	Dunhill	Tobacco	£	£	£	£	£
96	103	▲	Aston Martin	Automobiles	£	£	£	£	£
97	132	▲	Finish	Household Products	£	£	£	£	£
98	110	▲	FremantleMedia	Media	£	£	£	£	£
99	146	▲	Currys	Retail	£	£	£	£	£
100	109	▲	Sunsilk	Cosmetics	£	£	£	£	£

Top 250 most valuable British brands 100-151

2023 Rank	2022 Rank		Brand	Sector	2023 Brand Value	Brand Value Change	2022 Brand Value	2023 Brand Rating	2022 Brand Rating
101	71	↓	Computacenter	Tech	🔒	🔒	🔒	🔒	🔒
102	119	↑	Greggs	Restaurants	🔒	🔒	🔒	🔒	🔒
103	90	↓	Waitrose	Retail	🔒	🔒	🔒	🔒	🔒
104	117	↑	Reebok	Apparel	🔒	🔒	🔒	🔒	🔒
105	99	↓	Premier Inn	Hotels	🔒	🔒	🔒	🔒	🔒
106	114	↑	Intertek	Commercial Services	🔒	🔒	🔒	🔒	🔒
107	122	↑	Ballantine's	Spirits	🔒	🔒	🔒	🔒	🔒
108	91	↓	Crowne Plaza	Hotels	🔒	🔒	🔒	🔒	🔒
109	94	↓	Sage	Tech	🔒	🔒	🔒	🔒	🔒
110	120	↑	Babcock	Commercial Services	🔒	🔒	🔒	🔒	🔒
111	76	↓	Taylor Wimpey	Real Estate	🔒	🔒	🔒	🔒	🔒
112	112	↔	Ovaltine	Soft Drinks	🔒	🔒	🔒	🔒	🔒
113	121	↑	G4S	Commercial Services	🔒	🔒	🔒	🔒	🔒
114	135	↑	Chivas Regal	Spirits	🔒	🔒	🔒	🔒	🔒
115	89	↓	British Gas	Utilities	🔒	🔒	🔒	🔒	🔒
116	140	↑	Kit Kat	Food	🔒	🔒	🔒	🔒	🔒
117	115	↓	Virgin Money	Banking	🔒	🔒	🔒	🔒	🔒
118	108	↓	Iceland	Retail	🔒	🔒	🔒	🔒	🔒
119	129	↑	Balfour Beatty	Engineering & Construction	🔒	🔒	🔒	🔒	🔒
120	-	New	Gordon's	Spirits	🔒	🔒	🔒	🔒	🔒
121	124	↑	Bank of Scotland	Banking	🔒	🔒	🔒	🔒	🔒
122	130	↑	Royal Mail	Logistics	🔒	🔒	🔒	🔒	🔒
123	142	↑	Hays	Commercial Services	🔒	🔒	🔒	🔒	🔒
124	111	↓	SkyBet	Leisure & Tourism	🔒	🔒	🔒	🔒	🔒
125	88	↓	McLaren	Automobiles	🔒	🔒	🔒	🔒	🔒
126	118	↓	Grant's	Spirits	🔒	🔒	🔒	🔒	🔒
127	113	↓	Persimmon	Engineering & Construction	🔒	🔒	🔒	🔒	🔒
128	126	↓	Ladbrokes	Leisure & Tourism	🔒	🔒	🔒	🔒	🔒
129	143	↑	Jet2.com	Airlines	🔒	🔒	🔒	🔒	🔒
130	147	↑	Lifebuy	Cosmetics	🔒	🔒	🔒	🔒	🔒
131	131	↔	Arriva	Logistics	🔒	🔒	🔒	🔒	🔒
132	-	New	Horlicks	Soft Drinks	🔒	🔒	🔒	🔒	🔒
133	136	↑	Heathrow Airport	Airports	🔒	🔒	🔒	🔒	🔒
134	134	↔	Scottish Power	Utilities	🔒	🔒	🔒	🔒	🔒
135	144	↑	Glenfiddich	Spirits	🔒	🔒	🔒	🔒	🔒
136	116	↓	Ocado	Retail	🔒	🔒	🔒	🔒	🔒
137	141	↑	BetFair	Leisure & Tourism	🔒	🔒	🔒	🔒	🔒
138	-	New	Argos	Retail	🔒	🔒	🔒	🔒	🔒
139	-	New	Bombay Sapphire	Spirits	🔒	🔒	🔒	🔒	🔒
140	128	↓	Wetherspoons	Restaurants	🔒	🔒	🔒	🔒	🔒
141	-	New	Subsea 7	Oil & Gas	🔒	🔒	🔒	🔒	🔒
142	148	↑	First	Logistics	🔒	🔒	🔒	🔒	🔒
143	-	New	Cathedral City	Food	🔒	🔒	🔒	🔒	🔒
144	-	New	The Body Shop	Cosmetics	🔒	🔒	🔒	🔒	🔒
145	139	↓	Coral	Leisure & Tourism	🔒	🔒	🔒	🔒	🔒
146	145	↓	Screwfix	Retail	🔒	🔒	🔒	🔒	🔒
147	-	New	Dr. Martens	Apparel	🔒	🔒	🔒	🔒	🔒
148	123	↓	Vauxhall	Automobiles	🔒	🔒	🔒	🔒	🔒
149	-	New	Centrica	Utilities	🔒	🔒	🔒	🔒	🔒
150	-	New	Birds Eye	Food	🔒	🔒	🔒	🔒	🔒

Top 250 most valuable British brands 151-200

2023 Rank	2022 Rank		Brand	Sector	2023 Brand Value	Brand Value Change	2022 Brand Value	2023 Brand Rating	2022 Brand Rating
151	-	New	Serco	Commercial Services	🔒	🔒	🔒	🔒	🔒
152	-	New	Boohoo.Com	Apparel	🔒	🔒	🔒	🔒	🔒
153	149	↓	Capita	Commercial Services	🔒	🔒	🔒	🔒	🔒
154	137	↓	Softcat	Tech	🔒	🔒	🔒	🔒	🔒
155	-	New	RBS	Banking	🔒	🔒	🔒	🔒	🔒
156	-	New	Signal	Cosmetics	🔒	🔒	🔒	🔒	🔒
157	-	New	Jimmy Choo	Apparel	🔒	🔒	🔒	🔒	🔒
158	-	New	Staybridge Suites	Hotels	🔒	🔒	🔒	🔒	🔒
159	-	New	Innocent	Soft Drinks	🔒	🔒	🔒	🔒	🔒
160	-	New	New Look	Apparel	🔒	🔒	🔒	🔒	🔒
161	-	New	Brit	Insurance	🔒	🔒	🔒	🔒	🔒
162	-	New	Direct Line	Insurance	🔒	🔒	🔒	🔒	🔒
163	-	New	Onesavings Bank	Banking	🔒	🔒	🔒	🔒	🔒
164	-	New	Close Brothers Group	Banking	🔒	🔒	🔒	🔒	🔒
165	-	New	Utility Warehouse	Utilities	🔒	🔒	🔒	🔒	🔒
166	150	↓	Kingsmill	Food	🔒	🔒	🔒	🔒	🔒
167	127	↓	Janus Henderson	Banking	🔒	🔒	🔒	🔒	🔒
168	-	New	The AA	Commercial Services	🔒	🔒	🔒	🔒	🔒
169	-	New	Jo Malone	Cosmetics	🔒	🔒	🔒	🔒	🔒
170	-	New	Jordans	Food	🔒	🔒	🔒	🔒	🔒
171	-	New	Severn Trent	Utilities	🔒	🔒	🔒	🔒	🔒
172	-	New	Associated British Foods	Food	🔒	🔒	🔒	🔒	🔒
173	-	New	Taylor & Francis	Media	🔒	🔒	🔒	🔒	🔒
174	-	New	4Imprint	Commercial Services	🔒	🔒	🔒	🔒	🔒
175	-	New	White Horse	Spirits	🔒	🔒	🔒	🔒	🔒
176	-	New	John Player	Tobacco	🔒	🔒	🔒	🔒	🔒
177	-	New	Dewar's	Spirits	🔒	🔒	🔒	🔒	🔒
178	-	New	United Utilities	Utilities	🔒	🔒	🔒	🔒	🔒
179	-	New	Arup	Commercial Services	🔒	🔒	🔒	🔒	🔒
180	-	New	Hendrick's	Spirits	🔒	🔒	🔒	🔒	🔒
181	-	New	Avon International	Cosmetics	🔒	🔒	🔒	🔒	🔒
182	-	New	William Lawson	Spirits	🔒	🔒	🔒	🔒	🔒
183	-	New	Virgin Atlantic	Airlines	🔒	🔒	🔒	🔒	🔒
184	-	New	Michael Page International	Commercial Services	🔒	🔒	🔒	🔒	🔒
185	-	New	Strongbow	Beers	🔒	🔒	🔒	🔒	🔒
186	-	New	Hovis	Food	🔒	🔒	🔒	🔒	🔒
187	-	New	Bell's	Spirits	🔒	🔒	🔒	🔒	🔒
188	-	New	Sophos Group	Tech	🔒	🔒	🔒	🔒	🔒
189	-	New	Black & White	Spirits	🔒	🔒	🔒	🔒	🔒
190	-	New	Daily Mail	Media	🔒	🔒	🔒	🔒	🔒
191	-	New	Veet	Cosmetics	🔒	🔒	🔒	🔒	🔒
192	-	New	Pretty Little Thing	Apparel	🔒	🔒	🔒	🔒	🔒
193	-	New	The Famous Grouse	Spirits	🔒	🔒	🔒	🔒	🔒
194	-	New	Glenlivet	Spirits	🔒	🔒	🔒	🔒	🔒
195	-	New	Urban Decay	Cosmetics	🔒	🔒	🔒	🔒	🔒
196	-	New	Petrofac	Oil & Gas	🔒	🔒	🔒	🔒	🔒
197	-	New	Halfords	Retail	🔒	🔒	🔒	🔒	🔒
198	-	New	TalkTalk	Telecoms	🔒	🔒	🔒	🔒	🔒
199	-	New	Robinsons	Soft Drinks	🔒	🔒	🔒	🔒	🔒
200	-	New	Tanqueray	Spirits	🔒	🔒	🔒	🔒	🔒

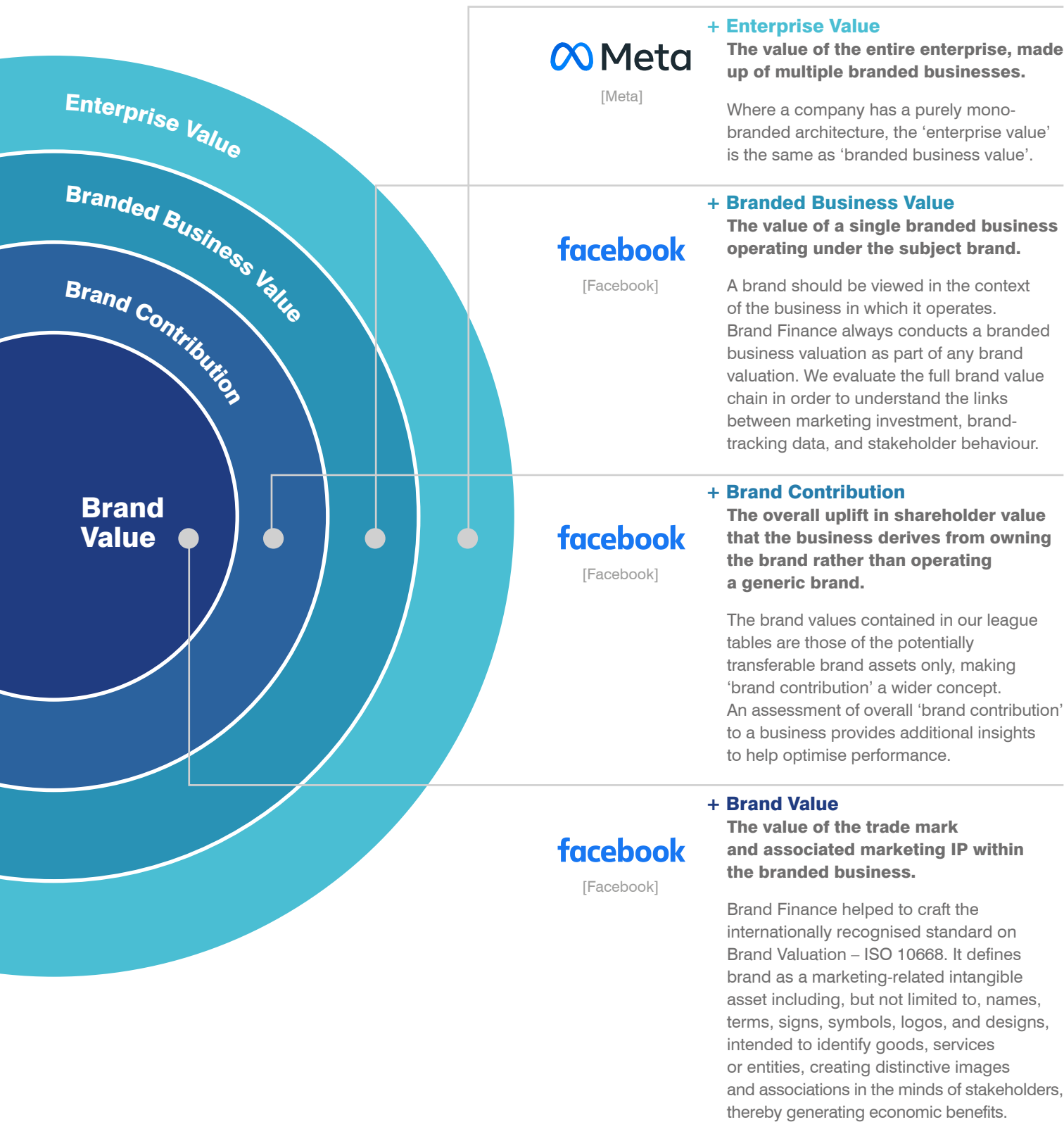
Top 250 most valuable British brands 201-250

2023 Rank	2022 Rank		Brand	Sector	2023 Brand Value	Brand Value Change	2022 Brand Value	2023 Brand Rating	2022 Brand Rating
201	-	New	Rimmel	Cosmetics	£	£	£	£	£
202	-	New	J&B	Spirits	£	£	£	£	£
203	-	New	Spectris	Tech	£	£	£	£	£
204	-	New	Shawbrook Group	Banking	£	£	£	£	£
205	-	New	Gala Bingo	Leisure & Tourism	£	£	£	£	£
206	-	New	TSB	Banking	£	£	£	£	£
207	-	New	Yorkshire Tea	Soft Drinks	£	£	£	£	£
208	-	New	One Stop	Retail	£	£	£	£	£
209	-	New	Parker Meggitt	Aerospace & Defence	£	£	£	£	£
210	-	New	Merlin Entertainment	Leisure & Tourism	£	£	£	£	£
211	-	New	Cineworld	Leisure & Tourism	£	£	£	£	£
212	-	New	Fever-Tree	Soft Drinks	£	£	£	£	£
213	-	New	Churchill	Insurance	£	£	£	£	£
214	-	New	De Beers	Mining, Metals & Minerals	£	£	£	£	£
215	-	New	Aggregate Industries	Engineering & Construction	£	£	£	£	£
216	-	New	Coats Group	Apparel	£	£	£	£	£
217	-	New	Beefeater	Spirits	£	£	£	£	£
218	-	New	Gauloises	Tobacco	£	£	£	£	£
219	-	New	Ted Baker	Apparel	£	£	£	£	£
220	-	New	Coventry Building Society	Banking	£	£	£	£	£
221	-	New	Elemis	Cosmetics	£	£	£	£	£
222	-	New	Vanquis Bank	Banking	£	£	£	£	£
223	-	New	Farfetch	Retail	£	£	£	£	£
224	-	New	Arm	Tech	£	£	£	£	£
225	-	New	Mott MacDonald	Commercial Services	£	£	£	£	£
226	-	New	Davidoff	Tobacco	£	£	£	£	£
227	-	New	Rathbones	Banking	£	£	£	£	£
228	-	New	Skipton Building Society	Banking	£	£	£	£	£
229	-	New	Craven A	Tobacco	£	£	£	£	£
230	-	New	Sailor Jerry	Spirits	£	£	£	£	£
231	-	New	Buchanan's	Spirits	£	£	£	£	£
232	-	New	Paysafe	Commercial Services	£	£	£	£	£
233	-	New	Revolut	Banking	£	£	£	£	£
234	-	New	Crest Nichols	Engineering & Construction	£	£	£	£	£
235	-	New	Cobham	Aerospace & Defence	£	£	£	£	£
236	-	New	Glenmorangie	Spirits	£	£	£	£	£
237	-	New	Foxy Bingo	Leisure & Tourism	£	£	£	£	£
238	-	New	Monkey Shoulder	Spirits	£	£	£	£	£
239	-	New	Smiths Detection	Engineering & Construction	£	£	£	£	£
240	-	New	RPS Group	Commercial Services	£	£	£	£	£
241	-	New	Computer Futures	Commercial Services	£	£	£	£	£
242	-	New	Britvic	Soft Drinks	£	£	£	£	£
243	-	New	Derwent	Household Products	£	£	£	£	£
244	-	New	Segro	Real Estate	£	£	£	£	£
245	-	New	Quilter	Banking	£	£	£	£	£
246	-	New	Ultra	Aerospace & Defence	£	£	£	£	£
247	-	New	Vat 69	Spirits	£	£	£	£	£
248	-	New	Benson & Hedges	Tobacco	£	£	£	£	£
249	-	New	Bwin	Leisure & Tourism	£	£	£	£	£
250	-	New	Cow & Gate	Food	£	£	£	£	£



Methodology.

Definitions.



Brand Valuation Methodology.

Definition of Brand

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

Brand Value

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

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

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

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

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

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

Disclaimer

Brand Finance has produced this study with an independent and unbiased analysis. The values derived and opinions produced in this study are based only on publicly available information and certain assumptions that Brand Finance used where such data was deficient or unclear. Brand Finance accepts no responsibility and will not be liable in the event that the publicly available information relied upon is subsequently found to be inaccurate. The opinions and financial analysis expressed in the report are not to be construed as providing investment or business advice. Brand Finance does not intend the report to be relied upon for any reason and excludes all liability to any body, government or organisation.

1



Brand Impact

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

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

2

Brand Strength

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



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

3



Brand Impact × Brand Strength

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

Forecast Brand Value Calculation

4

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



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

Brand Strength.

Brand Strength

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

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



1 Attribute Selection and Weighting

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

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

2

Data Collection

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

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

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



3 Benchmarking and Final Scoring

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













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

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













Global Brand Equity Monitor.

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

Tier 1

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

Tier 2

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



Brand KPIs and Diagnostics

1. Brand Funnel



Awareness

Have heard of your brand

Familiarity

Know something about your brand

Consideration

Would consider buying/using your brand

2. Brand Usage

3. Quality

4. Reputation

5. Loyalty

6. Closeness

7. Recommendation (NPS)

8. Word of Mouth

9. Brand Imagery

10. Advertising Awareness

11. Brand Momentum

Highlights from the Global Brand Equity Monitor.

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

What makes a brand great?

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

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

Does brand purpose deliver?

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

Who's the coolest cat?

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

Selected Rankings for Amazon – All Non-Luxury Brands

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

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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
	 	 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?



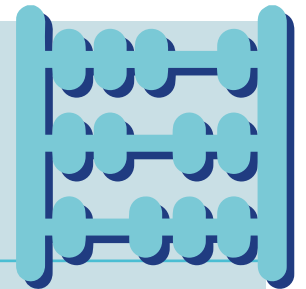
Brand Valuation

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?



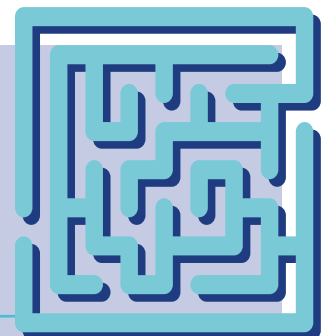
Brand Strategy

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).

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)



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

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