

BRANDZ™ TOP


100



Most Valuable
Global
Brands²⁰₂₀

The Corona virus drew many Newcomers to E-commerce

Value-shopping increased



**Buying local moved from
a sustainability practice
to mainstream**



People are looking for a modicum of certainty and optimism from Brands

Brands are entering the era of public

BRANDZ

The largest brand
building platform
in the world

3.8m

Consumer
interviews

170

Brands

k

512

Categories

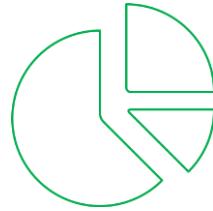
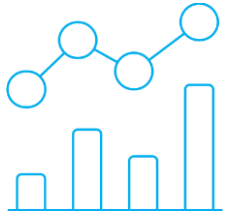
51

Markets

5.3bn

Data points

Ranking methodology



Step

01

Financial value (\$)

Financial value created
by a brand

Step

02

Brand contribution (%)

Proportion of financial value
generated by the brand's ability to
increase purchase volume and
charge premium.

Step

03

Brand value

Source: Step 1 – Bloomberg, Kantar; Step 2 – BrandZ

The Global Top 100 Most Valuable Brands 2020



1	Amazon	18	Moutai	34	Chanel	51	Cisco	67	HSBC	84	Aldi
2	Apple	19	Louis Vuitton	35	Adobe	52	JD	68	Haier	85	Uber
3	Microsoft	20	UPS	36	China Mobile	53	Budweiser	69	Agricultural Bank of China	86	UnitedHealthcare
4	Google	21	Nike	37	YouTube	54	Meituan	70	Pampers	87	Citi
5	Visa	22	Disney	38	Ping An	55	Vodafone	71	Dell Technologies	88	FedEx
6	Alibaba	23	PayPal	39	Hermès	56	Mercedes-Benz	72	IKEA	89	Gillette
7	Tencent	24	Starbucks	40	Samsung	57	Zara	73	AIA	90	BCA
8	Facebook	25	XFINITY	41	Salesforce	58	China Construction Bank	74	J.P. Morgan	91	Baidu
9	McDonald's	26	Netflix	42	Wells Fargo	59	HDFC Bank	75	LIC	92	Adidas
10	Mastercard	27	Walmart	43	LinkedIn	60	RBC	76	Colgate	93	DHL
11	AT&T	28	Spectrum	44	L'Oréal Paris	61	BMW	77	TD	94	Siemens
12	Verizon	29	Instagram	45	Huawei	62	Chase	78	Bank of America	95	Subway
13	Coca-Cola	30	Accenture	46	American Express	63	NTT	79	TikTok	96	Lowe's
14	IBM	31	ICBC	47	Costco	64	Didi Chuxing	80	Movistar	97	Bank of China
15	Marlboro	32	Deutsche Telekom	48	Toyota	65	Xbox	81	Xiaomi	98	Lancôme
16	The Home Depot	33	Intel	49	Gucci	66	Orange	82	KFC	99	Pepsi
17	SAP	34	Chanel	50	Oracle			83	Shell	100	Commonwealth Bank of Australia

Total value of the Top 100 brands in 2020

US \$5.0 trillion

...that's more than the **GDP of Japan**



Despite the Covid-19 pandemic, total
value of the Top 100 did not decline:

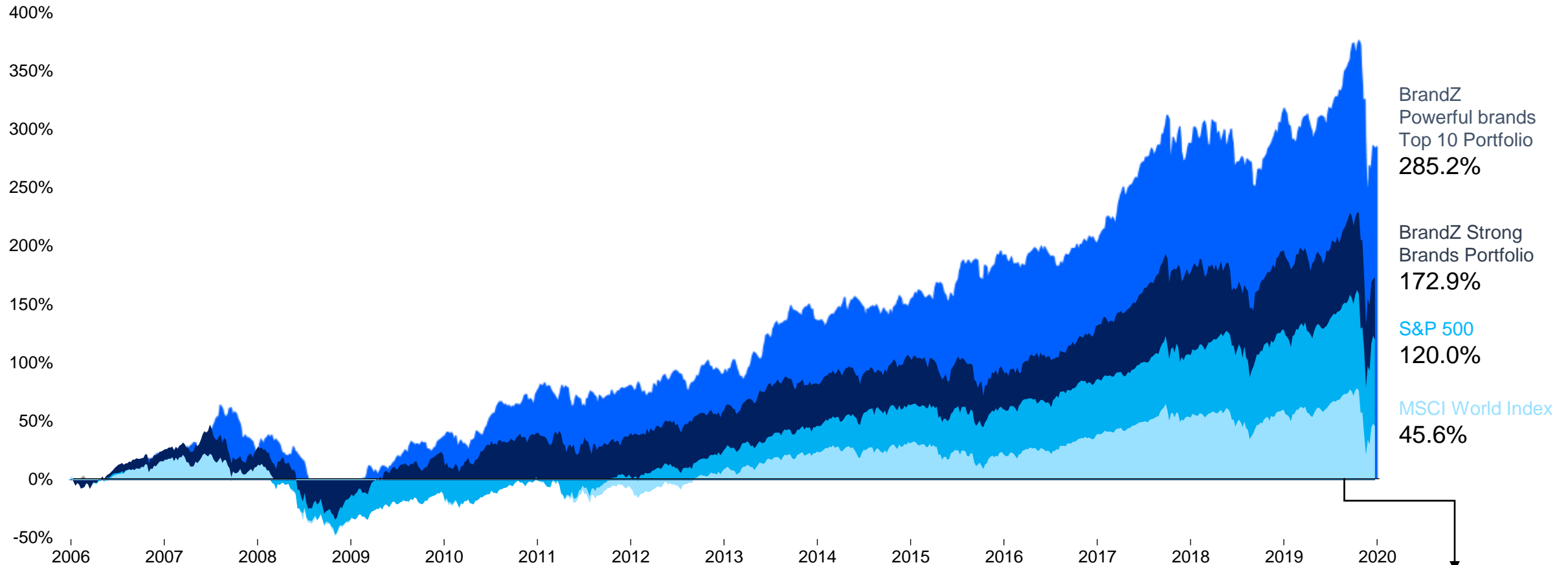
It grew by

US \$277 billion

**Strong brands across categories
prove resilient to extreme stress**

BrandZ strong brand portfolios continue to out-perform the market

BrandZ™ Portfolios vs S&P 500 vs MSCI World (April 2006 - April 2020)



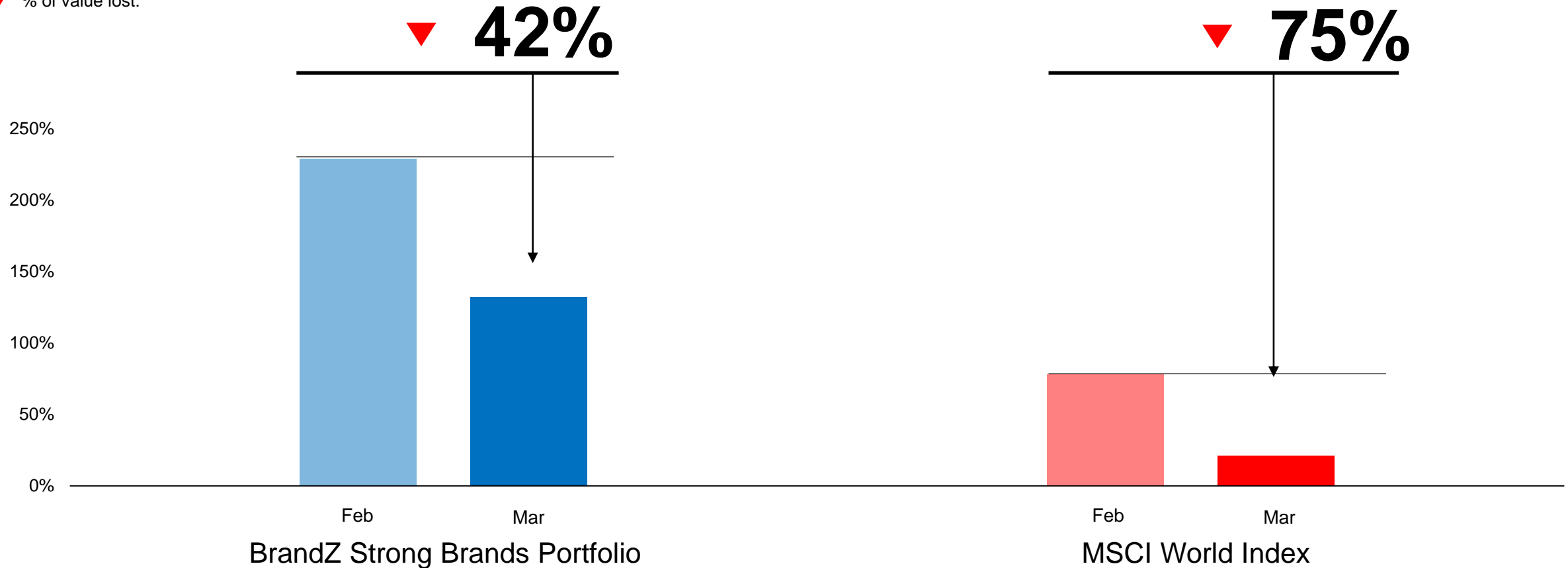
More detail of 2020 declines on next slide

When turbulence drives, markets down, strong brands decline more slowly

BrandZ portfolios vs. S&P500 and MSCI World: 14 February to 20 March 2020, indexed on April 2006



▼ % of value lost:



The Global Top 10 Most Valuable Brands 2020

Brand value in US\$ billion, with change from value in 2019



1  amazon

Retail
\$415 billion
▲ +32%

2 

Technology
\$352 billion
▲ +14%

3  Microsoft

Technology
\$327 billion
▲ +30%

4  Google

Technology
\$324 billion
▲ +5%

5  VISA

Payments
\$187 billion
▲ +5%

6  **Alibaba Group**
阿里巴巴集团

Retail
\$153 billion
▲ +16%

7  腾讯
Tencent

Technology
\$151 billion
▲ +15%

8  FACEBOOK

Technology
\$147 billion
▼ -7%

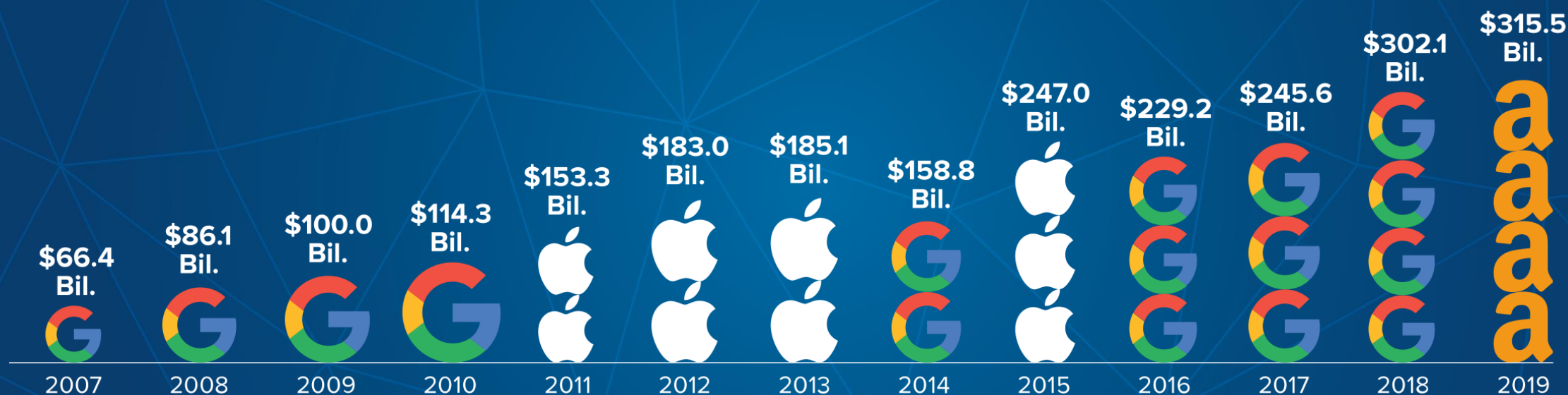
9 

Fast Food
\$129 billion
▼ -1%

10 

Payments
\$108 billion
NEW

Amazon Became the New No.1 in 2019



The changed Top 10



2006



2020



5 New Comers in 2020

79  TikTok

Entertainment
\$17 billion



86  UnitedHealthcare®

Insurance
\$156 billion



97  中國銀行
BANK OF CHINA

Banks
\$14 billion



98 LANCÔME
PARIS

Personal Care
\$14billion



99  pepsi

Beverages
\$3billion



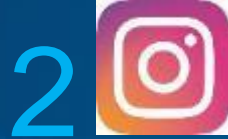
The Global Top 10 Fastest Risers

Change from value in 2019



Alcohol

+58%



Technology

+47%



Apparel

+40%



Retail

+35%



Entertainment

+34%



Retail

+32%



Technology

+31%



Technology

+30%



Technology

+29%



Lifestyle Platform

+27%

The Global Top 100 Chinese Brands



#5



#6



#18



#31



#36



#38



#45



#52



#54



#58



#64



#68



#69



#78



#81



#91



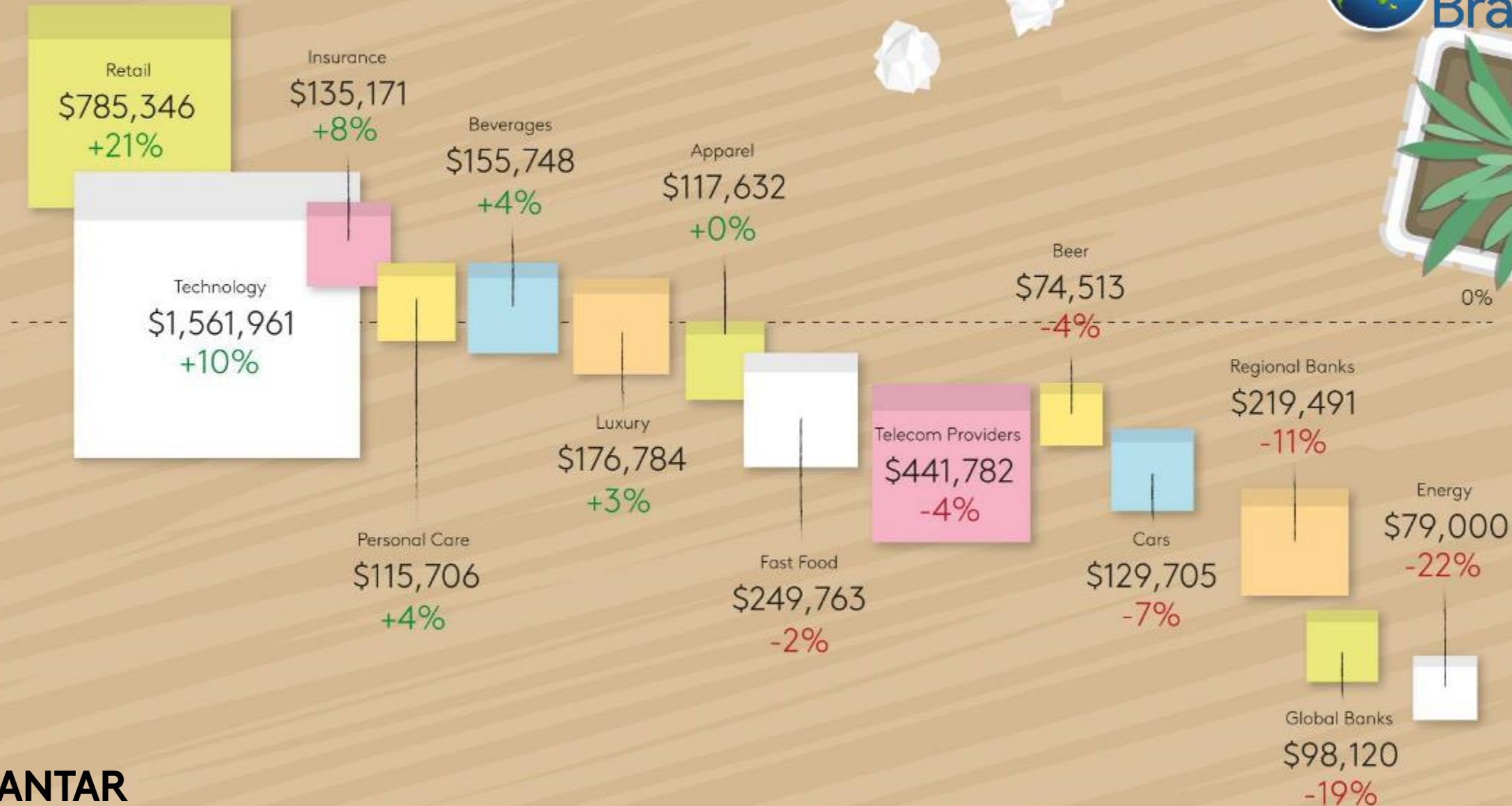
#97



Year-on-year Category Changes

% = Brand Value Change 2020 vs. 2019

\$ = Brand Value US\$ Mil.



Some sectors are heavily impacted by short-term effects

Categories with declines in 2020



Financial services

Economic uncertainty



Fast food

Pandemic lockdowns



Telecoms providers

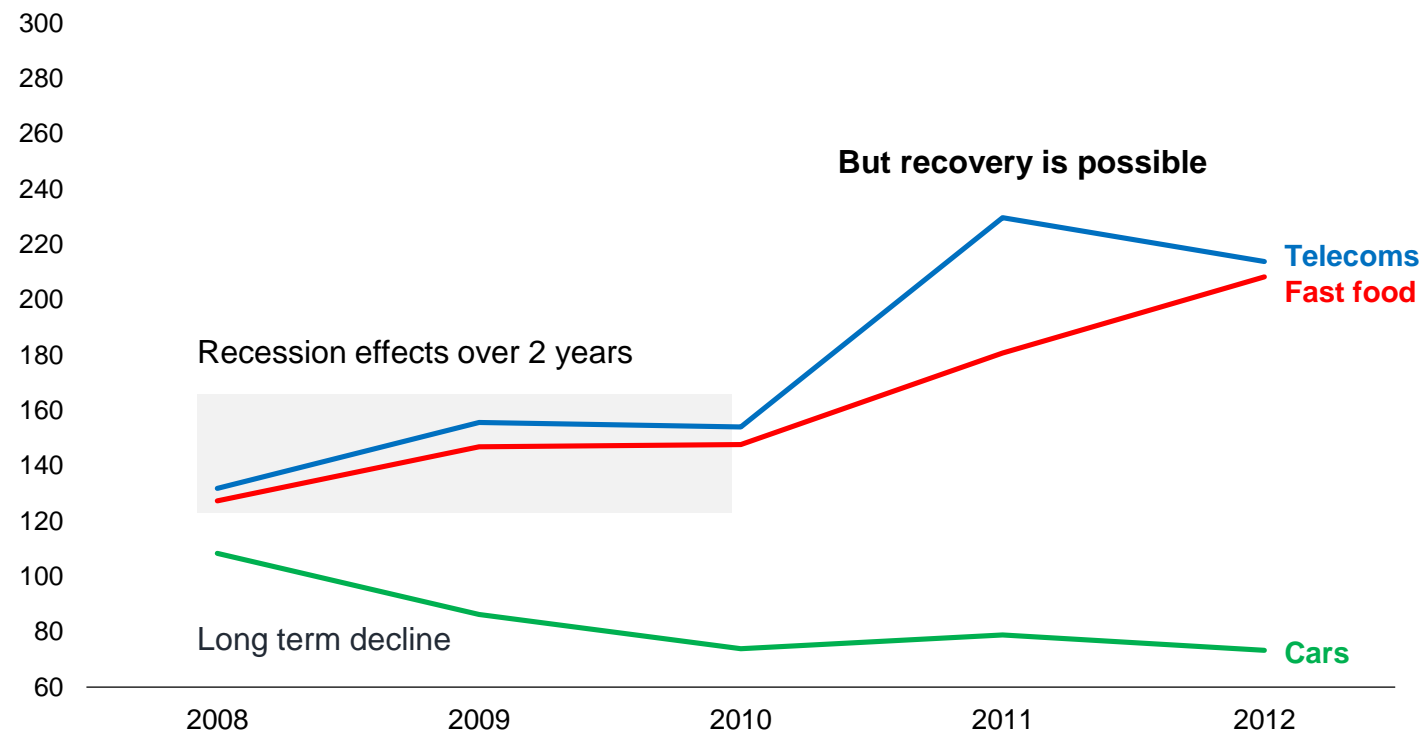
Economic uncertainty



Energy, Cars

Multiple factors

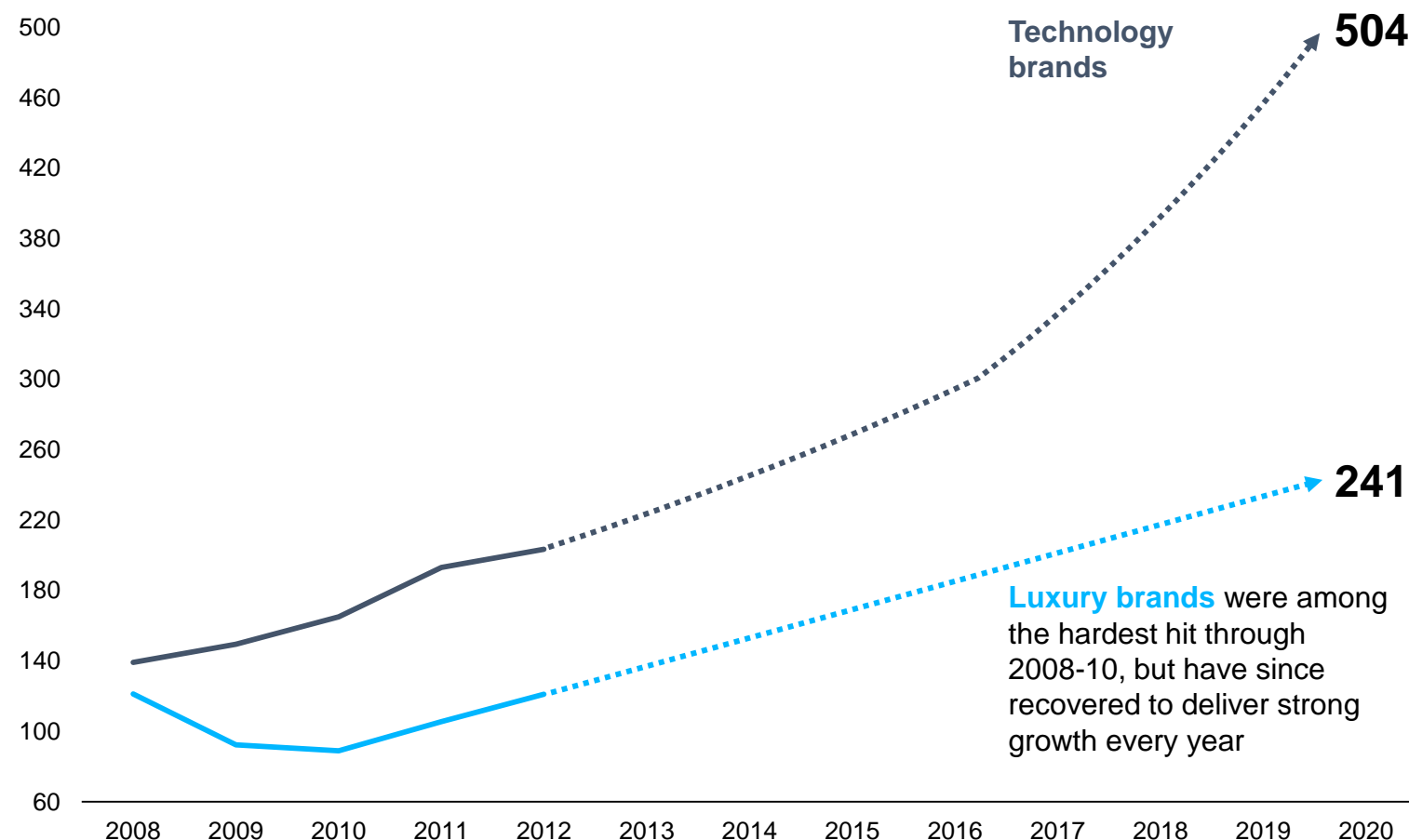
Comparison to effects during 2008 recession



Total sector value indexed on 2007 pre-recession (for top 10 brands each year)

Technology brands continued to grow brand value through the last recession and look set to continue this growth

Total sector value indexed on 2007 pre-recession
(for top 10 brands each year)

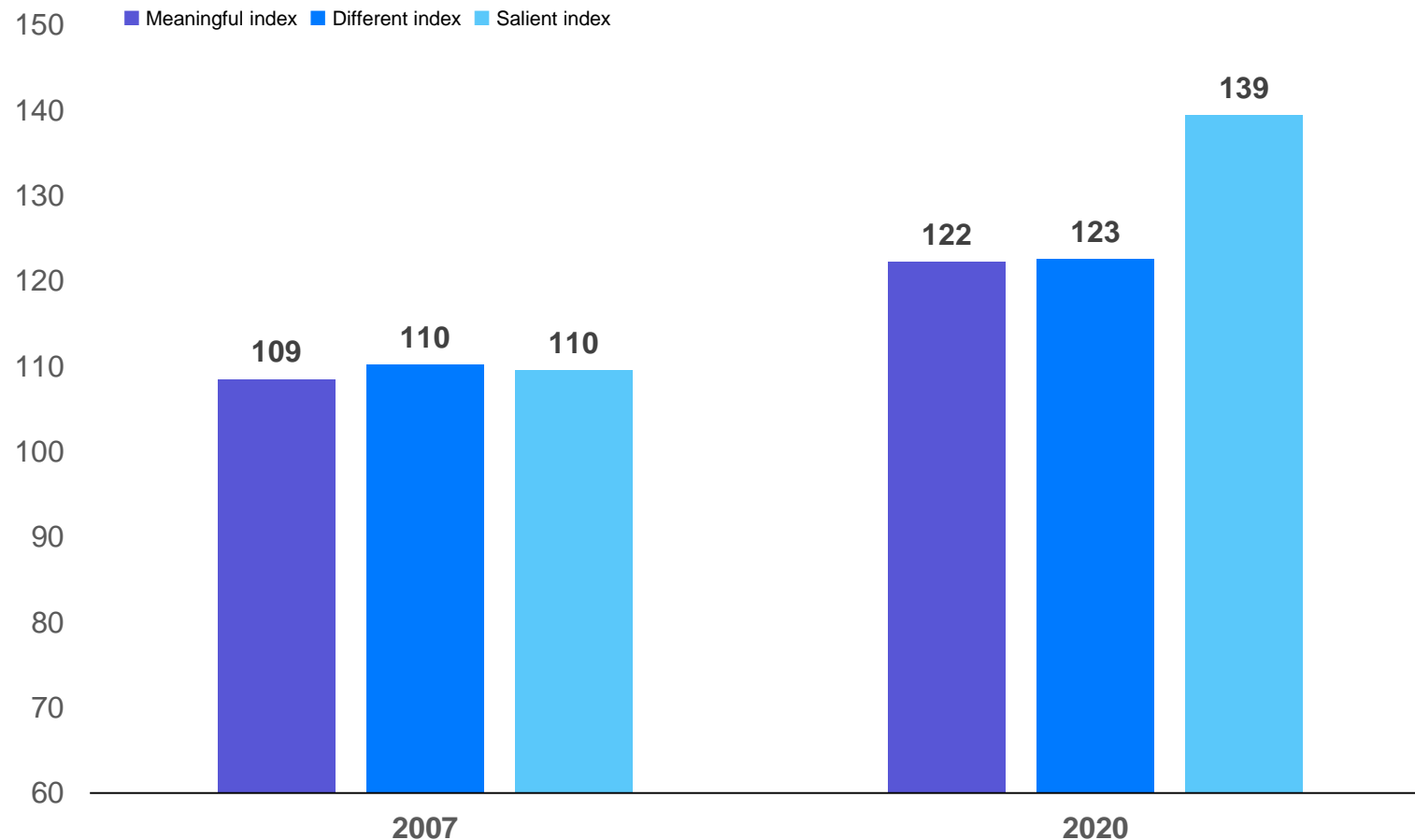


Marketing's decade of improvement

BRANDZ TOP
100 Most Valuable
Global
Brands²⁰₂₀

Brand equity across the Top 100 brands was much stronger at the start of the current pandemic than before the Great Recession of 2008

Average global index scores for Top 100 brands in each year



The BrandZ Top 100 2020 shows

Considerably Less Volatility

than 2008



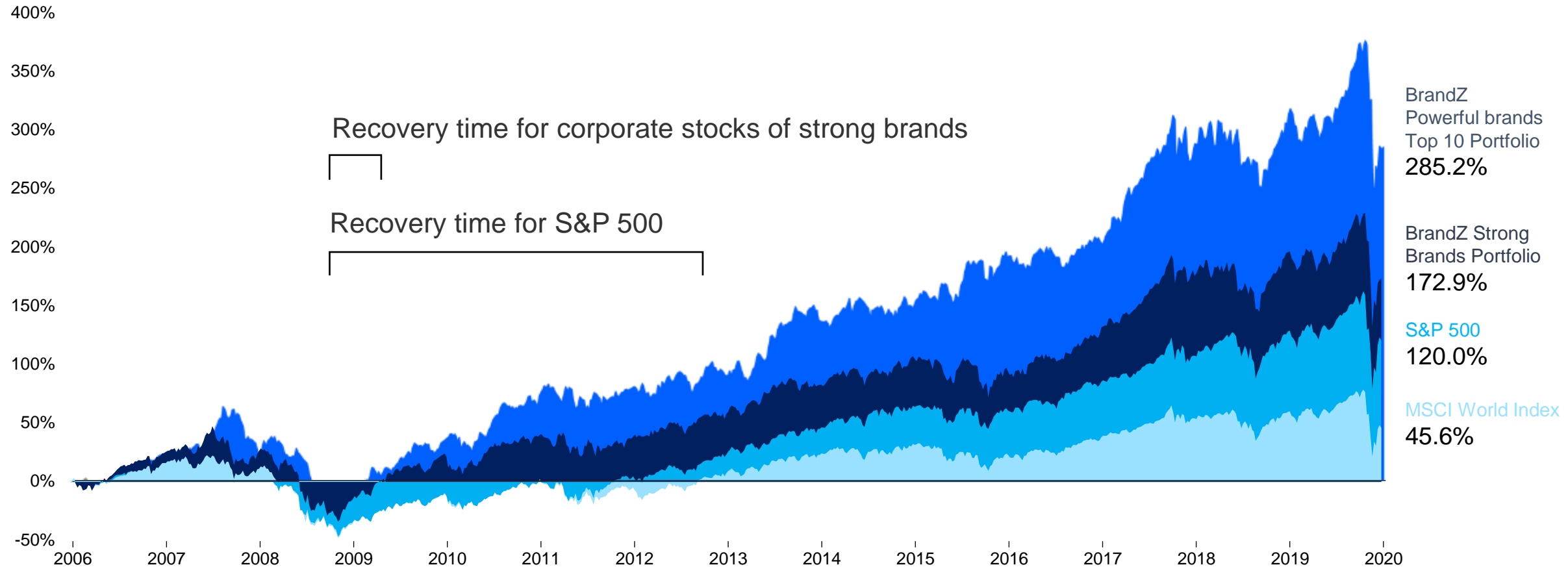
How to Build Strong Resilient Brands in the Post-Pandemic World?

Lessons Learned from 2020 Global Top 100 Brands

LESSON

Now is the time to
**BUILD BRAND
RESILIENCE**

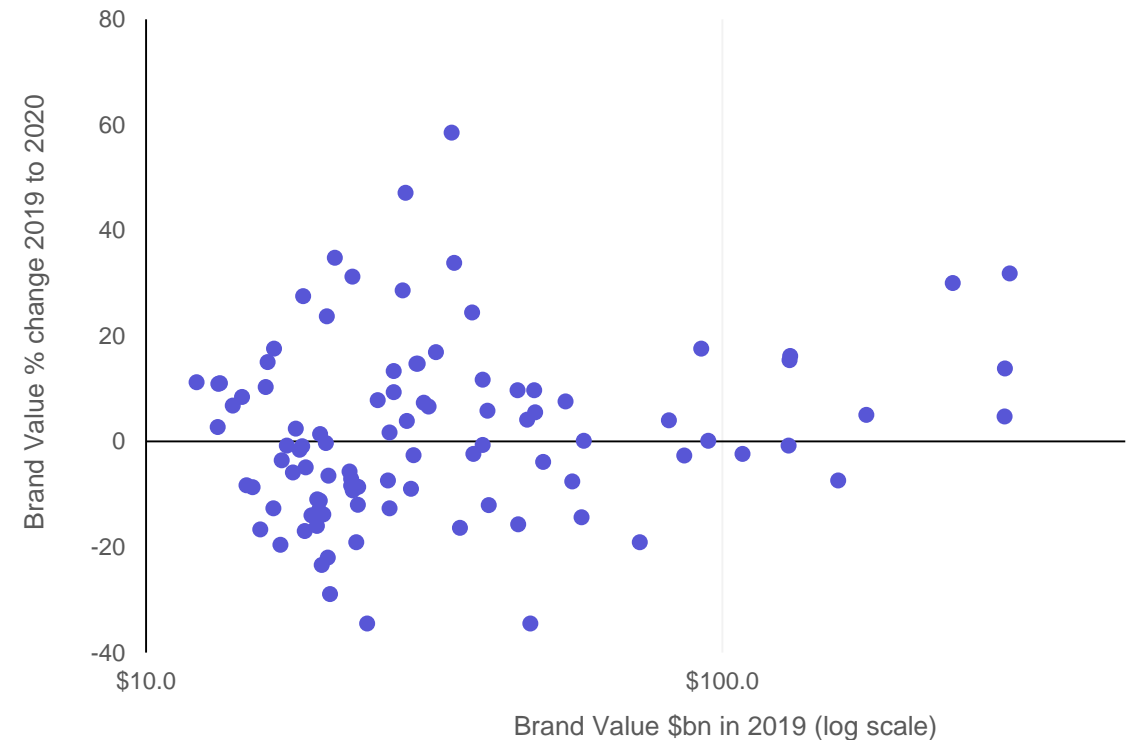
Strong brands recovered **5** times faster following the financial crisis of 2008



Size is no guarantee of future growth

There is no correlation between the brand value of the Top 100 brands a year ago and their growth since 2019

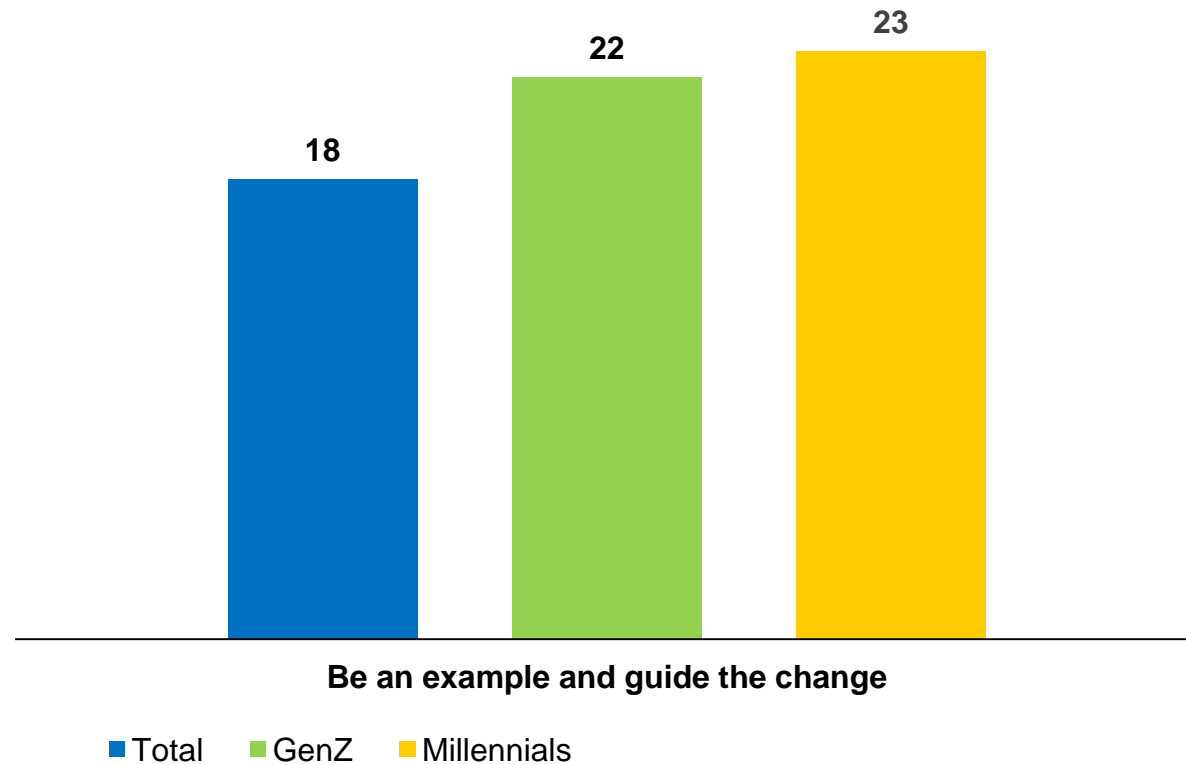
Brand value in 2019 vs. brand value % change 2019 -2020x



Horizontal axis is shown as a logarithmic scale to make all brands easily visible

Millennials also expect brands to take this proactive attitude and be the change

What should brands do at the moment...



30+ Fashion Brands Pivoting To Make Stylish Coronavirus Masks



Kristen Philipkoski Contributor

Style & Beauty

I cover the new luxury in fashion, design and lifestyle.



Balance brand building and activation to drive both short-term and long-term sales



LESSON

2

Now is the time to
**DRIVE
DEMAND**



Lululemon

+40%

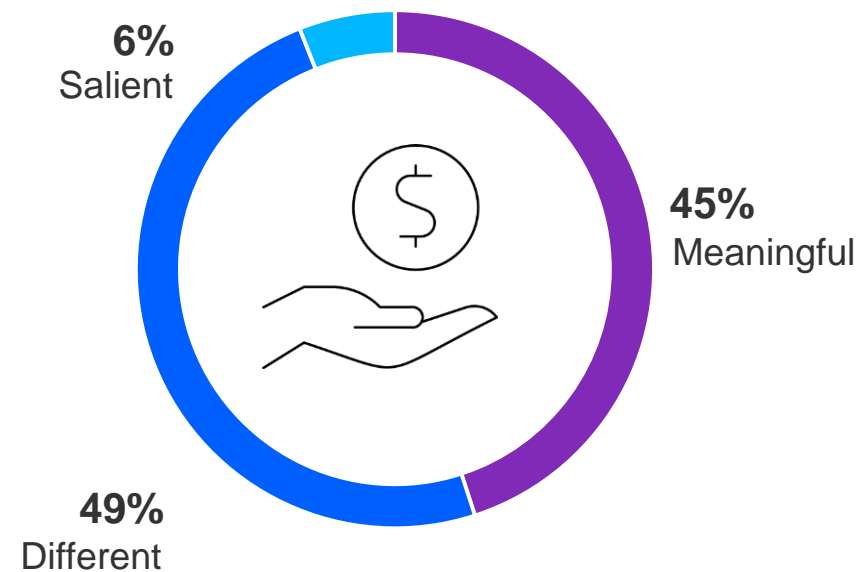


Meaningful Difference is critical to driving demand and sustaining margins



Margin drivers

Contribution to Premium



How to build difference?

Creating a **DISTINCT TERRITORY**, owning an **OCCASION** or offering a wider **ECOSYSTEM** of the benefits is the strongest route to growth now and in the future.



Which stage are you at?

from **PRODUCT BRAND**

to **OCCASION BRAND**

to **ECOSYSTEM BRAND**



PRODUCT BRAND

Drive product and communication distinctiveness



Global brand value growth



+16%

Estee Lauder changed its focus to make up for younger millennials with higher spending power rather than traditional older target market (anti-ageing products)

OCCASION BRAND

Differentiate by “owning an occasion”



NETFLIX



+34%



Owning the ‘evening in’ occasion – accelerated by Covid-19 lockdowns



+59%

Extending its ownership of the baijiu ‘gifting’ occasion: more festivals, consumers, variants

ECOSYSTEM BRAND

Harden the core and expand the eco

Haier



+15%



LESSON 3

Now is the time to
**INCREASE
PERCEIVED
VALUE**

COVID-19 has impacted or will impact
household income for...

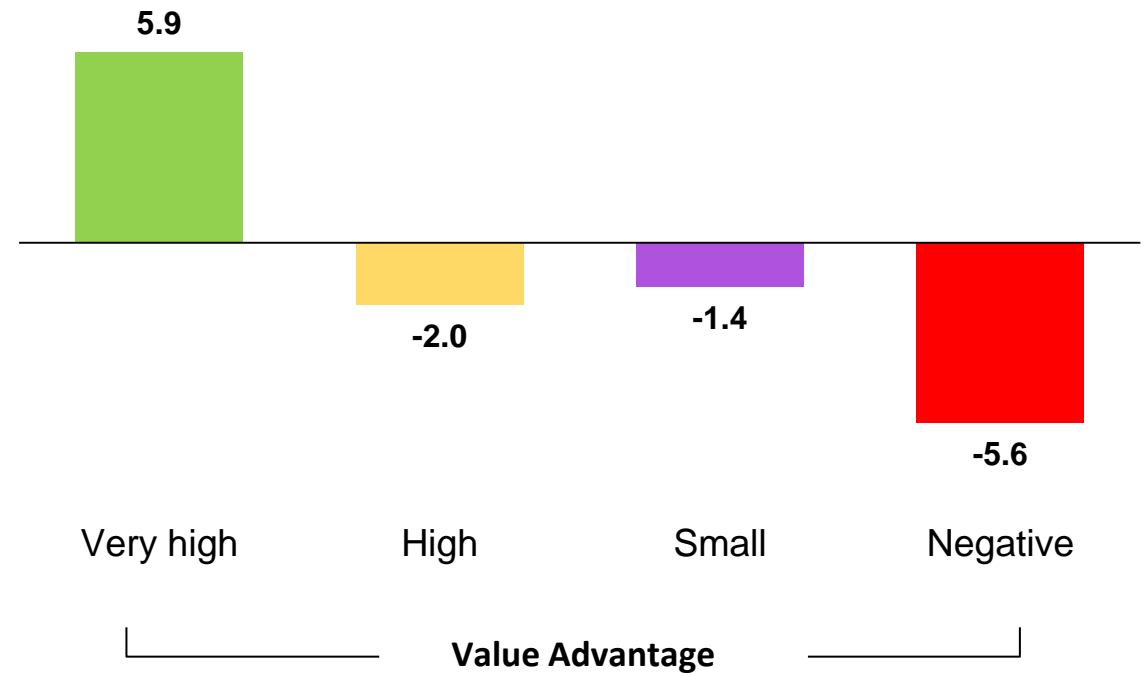
71%

...of households

Perceived value drives growth under tough times



Average brand value change in 2020



Drive Perceived Value through DISRUPTION



Disruption Index = 127



Disruption
Index = 148

LESSON



Now is the time to
**DIGITALIZE
BUSINESS
MODEL**

70%

of the global executives believe that the crisis will expedite the digitalization process.

Not applying DIGITAL LIPSTICK



Global brand value growth

▲
+12%



Order Domino's with

* **ZERO CLICKS**

China leads SOCIAL COMMERCE and O2O

KANTAR



PING AN Financial Services brand develops AI and other Innovative Technologies



5

LESSON

Now is the time to
**GET THE BASICS
RIGHT
TRUST AND
SUSTANABILITY**

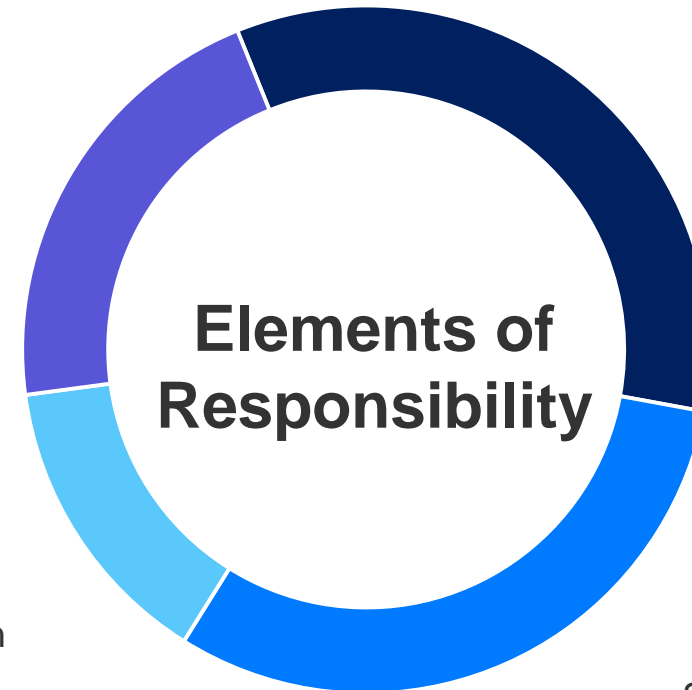
Responsibility accounts for
49%
of reputation

Environmental responsibility or Sustainability is now the most important element of Corporate Reputation


Responsibility is now 3x more important to corporate reputation than 10 years ago


Employees
21%


Supply chain
14%




Environment
34%


Society
31%

Survive is Thrive

**EFFICIENCY and
INVESTMENT**

