



Gambling 25 2024

The annual report on the most valuable and strongest Gambling brands
February 2024

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Brand Finance®



About Brand Finance

The world's leading brand valuation consultancy.

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Bridging 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.

Quantifying 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.

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.

Priding ourselves on technical credibility

Brand Finance, a chartered accountancy firm regulated by the Institute of Chartered Accountants in England and Wales, is the first brand valuation consultancy to join the International Valuation Standards Council. Our experts crafted standards (ISO 10668 and ISO 20671) and our methodology, certified by Austrian Standards, is officially approved by the Marketing Accountability Standards Board.

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.



Request your own Brand Value Report

Brand Finance's Brand Value Report provides a complete breakdown of the assumptions, data sources, and calculations used to determine your brand's value, as well as brand equity research.

Each report includes expert recommendations for growing brand value, driving performance, and gaining insights into your position against peers.

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Gain Insight

Leverage strategic insights to enhance your brand's financial standing.

Strategic Guidance

Strategise effectively to position your brand as a market leader.

Benchmark Your Performance

Benchmark your brand against industry standards for a competitive edge in the corporate landscape.

Empower Your Marketing Team

Empower your marketing team with comprehensive knowledge about your brand's financial value.

Enhance Communication

Optimise communication channels by understanding and articulating your brand's financial significance.

Deepen Understanding

Deepen your financial acumen and make well-informed decisions for corporate success.



Get Full Access to our Global Data

Brand Finance's Global Brand Equity Monitor Research utilises a comprehensive framework to track and measure the core building blocks that underpin strong brands, while delivering nuanced insights that direct strategy for understanding, maintaining and building brand strength.

Brands, and customer relationship with brands, are complex. As such they require **attention, direction** and **measured support** if they're to fulfil their potential. Our brand equity reports deliver expert insight and recommendations to power your brand strategies and valuation.

+6,000 brands

Original market research on global, market and sector leading brands.

41 countries

Comprehensive coverage for market specific learnings that inform decision making.

31 sectors

Benchmark your brand against competitors and leverage industry level insights to empower your strategy.

+150,000 respondents

Robust market representation for a global perspective.

8th consecutive year

Take a longer view to track and learn from fast growing brands, market disrupters, and market leaders.

Strategic Insight

Understand your brands standing in the market, what it's known for relative to the competition, and what drives customer decision making so you can create a roadmap for success.

Ranking Analysis



Gambling brand values surge across the industry as Singapore's Marina Bay Sands jumps to the top.

- + **Marina Bay Sands** Soars to New Heights:
Now the World's #1 Gambling Brand with
\$6.2 Billion Valuation
- + **FanDuel's** Winning Streak:
Brand Value Leaps by 67% to \$5.6 Billion,
Securing 2nd Place in the Gambling Industry
- + **DraftKings** Races Ahead:
Brand Value Skyrockets to \$3.2 Billion,
Climbing to 4th in Industry Rankings
- + **Caesars'** Remarkable Comeback:
Brand Value Jumps 68% to \$2.2 Billion,
Achieving AAA- Rating
- + **bet365** Faces Headwinds:
Brand Value Dips to \$2.8 Billion Despite
Strength Improvement

Ranking Analysis



Marina Bay Sands Soars to New Heights: Now the World's #1 Gambling Brand with \$6.2 Billion Valuation

Marina Bay Sands has emerged as the world's most valuable brand in the global gambling industry. This shift is highlighted by an 89% increase in brand value, reaching USD6.2 billion, and an improvement in brand strength from 86.83 to 91.81, becoming one of a handful of brands in any industry to achieve an AAA+ strength rating. Marina Bay Sands has risen from its previous ranking of 5th most valuable gambling brand to now be the world's #1.

The resort's status as a key landmark in Singapore, akin to iconic structures like the Eiffel Tower or Sydney Opera House, contributes to its brand identity.

The unique positioning of Marina Bay Sands, combining its role as an iconic landmark with its commercial success, distinguishes it within the industry. This dual aspect of the brand contributes to its distinct market identity.

Henry Farr
Associated Director, Brand Finance



Brand Finance research has found that this recognisability supports the brand's market extremely high familiarity rating, despite significant segments of the Singaporean community not participating in gambling activities due to religious and cultural factors. In the Singaporean market, research by Brand Finance indicates a strong reputation for Marina Bay Sands, with a high proportion of locals familiar with the brand expressing a willingness to use its facilities. This domestic strength contributes greatly to the brand's overall success.

A key factor in the brand's value growth is the capacity of the brand to achieve significant revenue diversification. Beyond its primary casino operations, Marina Bay Sands encompasses a hotel, shopping centre, restaurants, and entertainment facilities. This diversification strategy extends the brand's market reach and helps mitigate potential industry -specific risks.

FanDuel's Winning Streak: Brand Value Leaps by 67% to \$5.6 Billion, Securing 2nd Place in the Gambling Industry

FanDuel has exhibited substantial growth, with its brand value soaring by 67% to reach USD5.6 billion. This remarkable increase has elevated FanDuel from 4th to 2nd in the industry rankings, reflecting its growing prominence and influence in the gambling sector. Additionally, the brand's strength has improved, rising from 74.41 to 77.73, and achieving an AA+ rating, signifying a robust and healthy brand status.

The revenue growth of FanDuel, a key factor in its rising brand value, is estimated based on the H1 and Q3 reports released by its parent company, **Flutter**.

In 2022, Brand Finance estimates that FanDuel generated over USD\$3 billion in revenue, marking a substantial 62% increase from the previous year. This growth highlights FanDuel's successful strategies and its strong market presence.











In terms of market share, FanDuel has established itself as a dominant player. The brand is now the gross gaming revenue (GGR) market leader in 15 of the 18 states where it offers mobile sports bets. Impressively, in seven of these states, FanDuel commands more than 50% of the GGR market share. This dominance in multiple states underscores its widespread appeal and effective market penetration.

Flutter, the parent company of FanDuel, anticipates substantial long-term growth for its US business. They project revenue to increase by 4.5 to 5 times, potentially reaching around \$15 billion. This optimistic outlook is supported by FanDuel's 42% share of the sports betting market in the United States, a market that has rapidly expanded following the introduction of local regulatory regimes on a state-by-state basis.

In terms of brand perception, FanDuel has seen a significant boost in familiarity and consideration among consumers. However, these jumps in brand perception metrics are not as pronounced as those seen by **DraftKings**, indicating a slightly different trajectory in brand development and consumer engagement.

Top 10 Most Valuable Gambling Brands 2024

© Brand Finance Plc. 2024

<p>1 ▲</p> <p>MARINA BAY Sands SINGAPORE</p> <p>\$6.2 bn +89%</p> 	<p>2 ▲</p> <p>FANDUEL</p> <p>\$5.6 bn +67%</p> 	<p>3 ▼</p> <p>GENTING</p> <p>\$3.5 bn -2%</p> 	<p>4 ▲</p> <p>DRAFT KINGS</p> <p>\$3.2 bn +109%</p> 	<p>5 ▼</p> <p>Wynn RESORTS</p> <p>\$3.0 bn -14%</p> 
<p>6 ▼</p> <p>bet365</p> <p>\$2.9 bn -29%</p> 	<p>7 ▲</p> <p>PENN ENTERTAINMENT</p> <p>\$2.6 bn +39%</p> 	<p>8 ▲</p> <p>Harrah's</p> <p>\$2.3 bn +21%</p> 	<p>9 ▲</p> <p>CAESARS ENTERTAINMENT</p> <p>\$2.3 bn +68%</p> 	<p>10 ▼</p> <p>GALAXY MACAU 澳門銀河</p> <p>\$2.0 bn +2%</p> 



DraftKings Races Ahead: Brand Value Skyrockets to \$3.2 Billion, Climbing to 4th in Industry Rankings

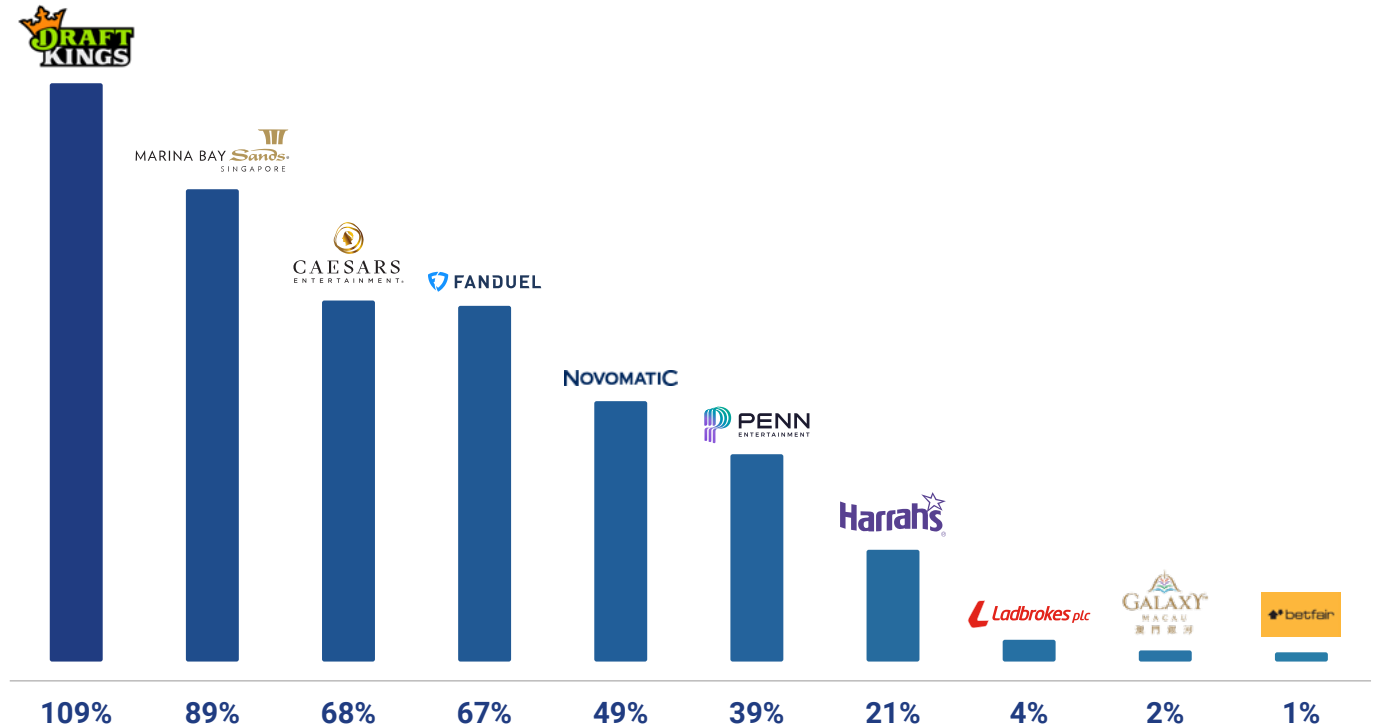
DraftKings has emerged as the fastest-growing brand in the gambling industry, more than doubling in brand value to USD3.2 billion. This growth has seen DraftKings leap from the 13th to the 4th position in brand rankings.

The increase in brand value was driven by a significant increase in brand strength, and also future revenue projections. DraftKings has achieved a big brand strength rise from 60.63 to 72.26. Brand Finance research indicated a substantial increase in both consideration and familiarity for DraftKings. These improvements in brand perception and market presence are critical components of the brand's overall growth and are indicative of its strengthening position in the market.

Revenue growth at DraftKings has been significant, with big increases throughout the last year. This growth is primarily attributed to the strong performance of their Sportsbook and iGaming product offerings, bolstered by effective customer acquisition and retention strategies, expansion into new jurisdictions, and improved promotional investment in these areas.

Brand Value Change 2023-2024 (%)

© Brand Finance Plc. 2024



Caesars' Remarkable Comeback: Brand Value Jumps 68% to \$2.2 Billion, Achieving AAA- Rating

Caesars has achieved remarkable growth this year, with its brand value surging by 68% to reach USD2.2 billion. This significant advancement has propelled Caesars from the 16th to the 7th position in the industry rankings. The brand's strength has also seen a substantial rise, moving from 66.45 with an AA- rating to 79.72, achieving an AAA- rating. This growth is a testament to Caesars' strategic advancements and its increasingly strong position in the gambling sector.

With all Caesars properties now operating in a post-COVID environment, Brand Finance research has found that Caesars' brand strength has been boosted by marked increases in brand familiarity and consideration. These elements are crucial as they directly impact consumer choice and loyalty, contributing significantly to the brand's overall strength and market position.

Caesars has reported a better-than-expected performance on revenue, reflecting a robust operational strategy and effective market engagement.

Consumer demand appears to remain strong for the various products, underscoring the brand's positive trajectory and its optimistic outlook for the future. This trend indicates a broader market recovery and expansion within the gambling industry.

Additionally, Brand Finance's research includes considering non-gambling activities, especially with the recovery in banquets and conventions, increased international visitation, and strategic initiatives in food and beverage offerings focused on improving operating margins and product mix. The resurgence in live entertainment events following COVID-19's impacts also contributed to this growth.

bet365 Faces Headwinds: Brand Value Dips to \$2.8 Billion Despite Strength Improvement

bet365, last year's leader, has experienced a notable decline in brand value. The brand's value decreased by 29%, bringing it to USD2.8 billion and resulting in a drop from 1st to 6th place in the rankings. Despite this decrease in brand value, bet365 saw an improvement in brand strength, climbing from 78.42 to 82.32.

Ranking Analysis

The primary reason for the decline in bet365's brand value is attributed to a fall in operating profits. While the company's revenue only dropped by 2%, its profits plummeted dramatically, falling by 90% compared to the previous year.

This significant decrease in profit is largely due to higher customer acquisition costs in new markets. These expenses were driven by advertising costs in new markets and investments in additional computing resources needed for expansion. Moreover, bet365's workforce expanded substantially, from 5,400 to over 6,000 employees to support product launches in Buenos Aires, Colorado, Ontario, and the Netherlands.

Despite the decline in brand value, bet365's brand strength showed a positive trajectory. Brand Finance research found that bet365's familiarity remains extremely high, suggesting that the brand still holds a strong presence in the minds of consumers. However, there was a marginal drop in consideration for bet365, which was partially offset by the brand's high volume premium and promotion scores. These scores indicate that while there may be slight hesitancy in consumer consideration, the bet365 brand continues to maintain a significant premium in the market and is broadly successful in its promotional effort.



Top 10 Strongest Gambling Brands 2024

© Brand Finance Plc. 2024

<p>1</p> <p>W</p> <p>MARINA BAY Sands SINGAPORE</p> <p>91.8</p> <p>+5.0</p>	<p>2</p> <p>▲</p> <p>bet365</p> <p>82.3</p> <p>+3.9</p>	<p>3</p> <p>▼</p> <p>GENTING</p> <p>80.5</p> <p>-2.5</p>	<p>4</p> <p>▼</p> <p>MGM GRAND</p> <p>80.1</p> <p>+0.6</p>	<p>5</p> <p>▲</p> <p>CAESARS ENTERTAINMENT</p> <p>79.7</p> <p>+13.3</p>
<p>6</p> <p>Wynn RESORTS</p> <p>78.6</p> <p>+4.0</p>	<p>7</p> <p>=</p> <p>FANDUEL</p> <p>77.7</p> <p>+3.3</p>	<p>8</p> <p>▲</p> <p>Harrah's</p> <p>76.5</p> <p>+10.0</p>	<p>9</p> <p>▼</p> <p>sky bet</p> <p>76.1</p> <p>+3.1</p>	<p>10</p> <p>▲</p> <p>THE VENETIAN MACAO</p> <p>75.2</p> <p>+7.2</p>

Brand Value Ranking (USDm)

Top 25 most valuable Gambling brands 1-25

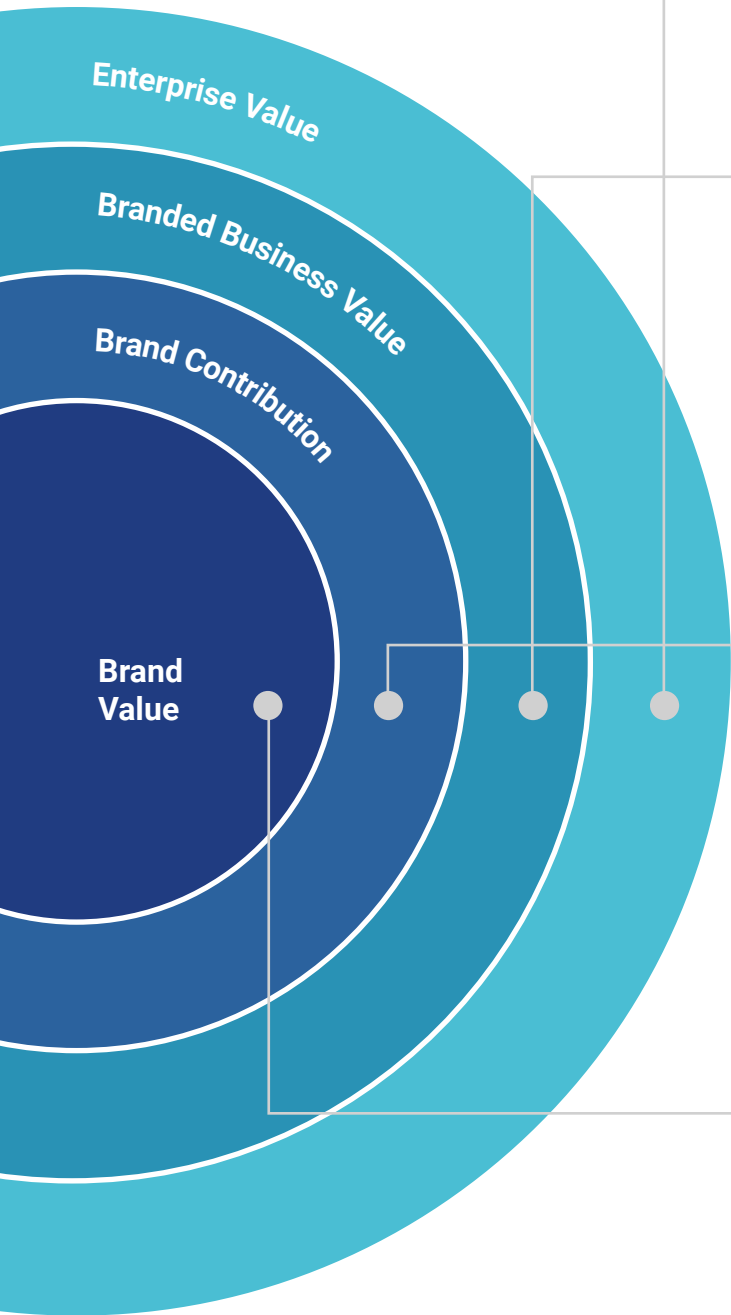
2024 Rank	2023 Rank	Brand	Country	2024 Brand Value	Brand Value Change	2023 Brand Value	2024 Brand Rating	2023 Brand Rating
1	5	▲ Marina Bay Sands	Singapore	\$6,164	+89.5%	\$3,253	AAA+	AAA
2	4	▲ FanDuel	United States	\$5,636	+67.2%	\$3,371	AA+	AA
3	2	▼ Genting	Malaysia	\$3,539	-2.3%	\$3,623	AAA-	AAA-
4	13	▲ DraftKings	United States	\$3,194	+108.9%	\$1,529	AA	A+
5	3	▼ Wynn Resorts	United States	\$2,988	-14.2%	\$3,483	AA+	AA+
6	1	▼ bet365	United Kingdom	\$2,850	-29.0%	\$4,015	AAA-	AA+
7	11	▲ Penn Entertainment	United States	\$2,553	+39.0%	\$1,837	A	BBB
8	10	▲ Harrah's	United States	\$2,270	+21.4%	\$1,870	AA+	AA-
9	16	▲ Caesars	United States	\$2,246	+67.7%	\$1,340	AAA-	AA-
10	9	▼ Galaxy Macau	China (Hong Kong)	\$2,003	+1.7%	\$1,970	AA	AA
11	7	▼ MGM	United States	🔒	🔒	🔒	🔒	🔒
12	8	▼ IGT	United Kingdom	🔒	🔒	🔒	🔒	🔒
13	6	▼ Aristocrat	Australia	🔒	🔒	🔒	🔒	🔒
14	12	▼ The Venetian Macao	China (Macao)	🔒	🔒	🔒	🔒	🔒
15	15	= Churchill Downs	United States	🔒	🔒	🔒	🔒	🔒
16	18	▲ City of Dreams	China (Hong Kong)	🔒	🔒	🔒	🔒	🔒
17	24	▲ Novomatic	Austria	🔒	🔒	🔒	🔒	🔒
18	14	▼ SJM	China (Hong Kong)	🔒	🔒	🔒	🔒	🔒
19	19	= Light and Wonder	United States	🔒	🔒	🔒	🔒	🔒
20	17	▼ William Hill	United Kingdom	🔒	🔒	🔒	🔒	🔒
21	21	= Sportsbet	Australia	🔒	🔒	🔒	🔒	🔒
22	20	▼ Sands Macao	China (Macao)	🔒	🔒	🔒	🔒	🔒
23	25	▲ Ladbrokes	United Kingdom	🔒	🔒	🔒	🔒	🔒
24	23	▼ SkyBet	United Kingdom	🔒	🔒	🔒	🔒	🔒
25	26	▲ BetFair	United Kingdom	🔒	🔒	🔒	🔒	🔒



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'.



+ 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.



+ 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.



+ 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

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.

What is 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 x 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%.

4. Forecast Brand Value Calculation credibility

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 Methodology

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.

Brand Strength Index



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 into 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.

Brand Research Methodology

For brands that specialize in B2B relationships and transactions, it's important to understand Brand Equity amongst their relevant target audience to have a holistic view of brand value and empower brand strategies through actionable insights and the monitoring of market trends. Our B2B practice have initiated a global study on the IT services market, conducting a structured quantitative assessment amongst a global network of senior business transformation and IT decision makers. The insights from the study will enable B2B brands to have actionable insights to grow their brand and business.

Brands included in the study: Accenture, Atos, Capgemini, CGI, CI&T, Cognizant, Deloitte, Dextra, DTI, DXC Technology, EPAM, EY, Fujitsu, Globant, HCLTech, Hexaware Technologies, HPE, IBM Consulting, Infosys, loasis, KPMG, Kyndryl, LTIMindtree, NTT Data, Persistent Systems, PwC, Reply, Sopra Steria, Stefanini, TCS, Tech Mahindra, Thoughtworks, TietoEvry, Tivit, Wipro, Xerox, Zup

Brand KPIs and Diagnostics



Brand Funnel

- + Knowledge
- + Consideration
- + Usage
- + Loyalty
- + Recommendation



Brand Image & Personality

- + Reputation, Strategy, Quality
- + Functional Image drivers (24)
 - Value
 - Innovation
 - Culture
- + Emotional connection



Respondent Profile

- + Role, Seniority, Location, Responsibilities
- + Interests & Sponsorship Engagement
- + Recognised Industry Trends



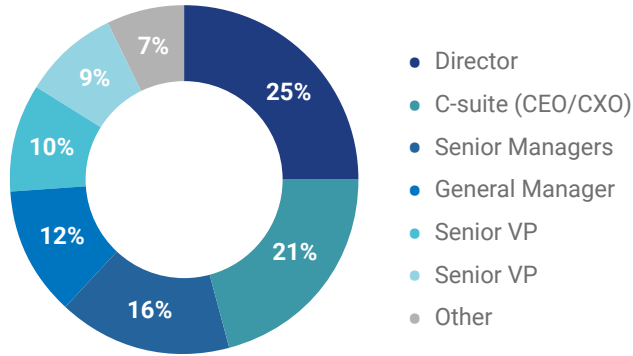
Gender

- + Male - 72%
- + Female - 28%

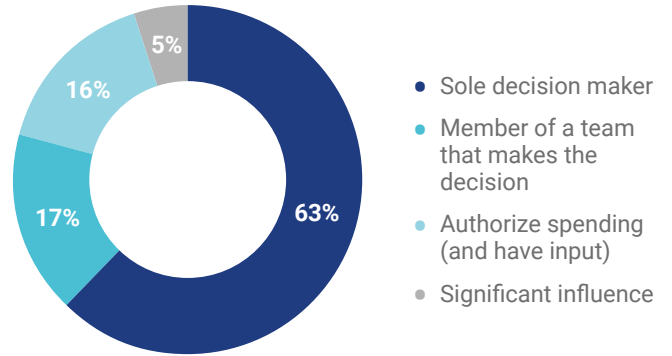
Regions	Sample Size	Country	Sample by Country
North America	354	United States	292
		Canada	62
Asia-Pacific (APAC)	216	Singapore	50
		Japan	51
		India	85
		Australia	30
		Spain	16
Europe	291	Sweden	8
		Germany	70
		France	36
		Italy	38
		United Kingdom	109
		Brazil	51
Latin America (LATAM)	101	Mexico	50

Brand Research Respondent Profile

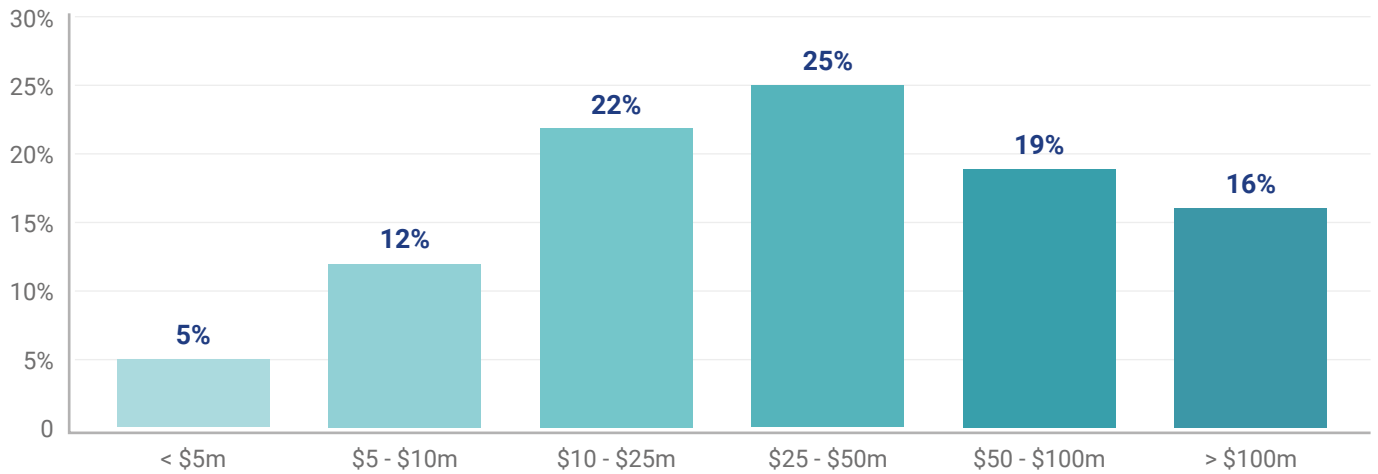
Which of the following job titles is the closest match for your current role?



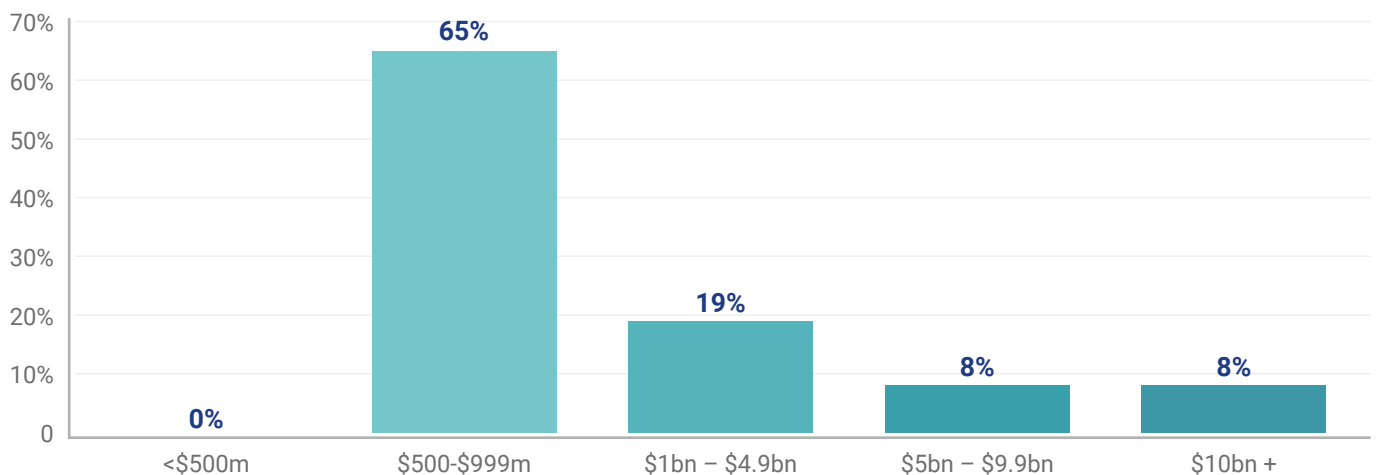
Which of the following job titles is the closest match for your current role?



Average digital transformation services/IT consulting order sanctioned/ approved by you/your team




Company's annual revenue (operating budget if public sector)



Key Survey Questions

Questions	
	How familiar are you with the below firm's digital transformation services/IT consulting?
	Which of these options best describes your likelihood to consider using/purchasing the following brand(s) digital transformation services/IT consulting in the future?
	Have you or your company purchased digital transformation services/IT consulting from this firm in the last two years?
	How good, in your opinion, is the overall reputation of the companies listed below?
	On a scale of 0-10, with 0 being very poorly and 10 being very strongly, how would you rate this brand on the following attributes: meet my needs, a brand I trust, a brand I admire.
	Please select which statement you agree more with regarding the price for the service offered by this brand: So cheap I doubt its quality, cheap but bargain for the price, average price, expensive but worth the price, too expensive for what you get.
	On a scale on 0 to 10, how likely are you to recommend the following brands?
	How would you rate the quality of these companies' services compared to others?
	How would you rate the sustainability of these companies in terms of its actions to protect the environment and in supporting communities and wider society?
	Thinking about the past 30 days, have you had any kind of conversation or exchange of views about the brands listed below. Please think about conversations in person, on the phone, messaging apps, online forums, social media post, etc.
	Which of the below brands to you remember seeing, hearing or reading about in advertising, communications or media (including sponsorship, events, industry publications etc.)?
	Which of the below channel(s) / platform (s) do you remember seeing this <BRAND> communicating and being active on?
	How would you rate the AI vision and capabilities of these companies?
	<ul style="list-style-type: none"> - To what extent do you agree or disagree that the following brand is...? - Committed to the environmental aspects of sustainability (e.g., climate change, avoiding waste/pollution, preservation of wildlife etc.). - Committed to the social aspects of sustainability (e.g., Women in Tech, equality, diversity and inclusion, education, etc.) - Well managed and governed (e.g., has a competent, diverse, and experienced leadership, treats customers and suppliers fairly, not corrupt etc.).

Demographics

	What is your current age?
	Which gender do you identify as?
	A quick question about sports and interests. Which of these things do you follow, in-person, on TV or online? Please select all that apply

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
- + Research Analytics
- + Soft Power

Questions we can help answer:

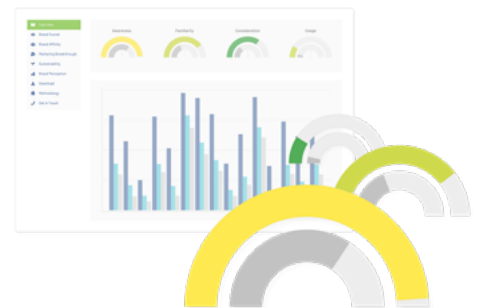
- Are we building our brands' strength effectively?
- How do I track and develop my brand equity?
- How strong are my competitors' brands?
- Are there any holes in my existing brand tracker?
- What do different stakeholders think of my brand?

Brand Insights

Make your brand's business case.

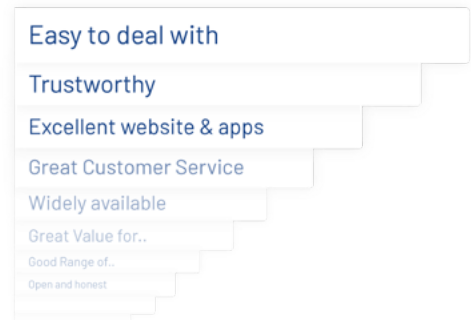
Benchmarking

In-depth external benchmarking – comparisons against direct competitors across key KPI's through the Brand Strength Index framework.



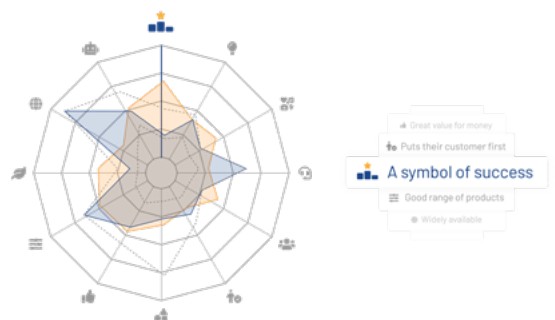
Drivers Analysis

Statistical **correlation** analysis to understand what is important in driving Brand Consideration, Reputation, Brand Strength and Value.



Brand Associations & Market Positioning

Diagnose Brand Strengths & Weaknesses – What is my brand known, and not known for? How do I leverage or optimize my brand position to grow brand value?



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

Questions we can help answer:

- 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

Questions we can help answer:

- 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 Sustainability

Understand perceptions and align them with performance.

Sustainability and ESG have never been more important considerations for marketers, finance professionals, and the brands they serve. Our sustainability services bring clarity, allowing you to make the right decisions to add value, protect yourself from risk, and do the right thing.

- + Perceptions Evaluation and Tracking
- + Sustainability ROI Analysis
- + Competitor Insights and Positioning Recommendations
- + Materiality Exercises
- + Stakeholder Engagement and Workshops
- + Sustainability Reporting and Disclosure Support

Questions we can help answer:

- How important is sustainability in driving the choices of customers, employees, and investors?
- Which sustainability issues are most relevant to my brand?
- How sustainable is my brand perceived to be versus competitors?
- What is the potential value of enhancing perceptions?
- Could value be at risk? If so, how much?
- How do I secure investment or budget allocation?
- How do I improve performance and perceptions?

Sponsorship Services

Maximise value from your sponsorships.

Sponsorships are often amongst the most extensive, influential, and expensive brand building activities a company can undertake. We use the same techniques applied in brand valuation, such as research, financial modelling, and strategic analysis. This approach helps marketing and finance managers to understand the effectiveness of sponsorships and maximise ROI.

Advertising equivalency, and traditional research interpretation of sponsorships, fails to adequately address key questions around brand building and value creation. Brand Finance takes a broader view to understand sponsorships in the context of achieving brand and business objectives.

- + Sponsorship Strategy
- + Partnership Opportunity Analysis
- + Return on Investment Analysis
- + Partnership Tracking
- + Sports Investment Due Diligence
- + Sponsorship Prospectus building
- + Activation Measurement & Strategy

Questions we can help answer:

- Can I develop a sponsorship strategy to match commercial objectives?
- Is the partnership a good fit?
- What is the short-term impact on business performance?
- What impacts there on long-term brand building metrics?
- What is my financial return from the sponsorship investment?
- Should the partnership be renewed, and if so, at what price?
- How does my sports partnership compare to the market?



Brand Dialogue Services

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).

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

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

Strategic Communications

- + Crisis Communications
- + Brand Positioning & Reputation
- + Corporate Social Responsibility
- + Geographic Branding

Brand Finance Network

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

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