



South Africa

50

2018

The annual report on the most valuable brands in South Africa
June 2018

In partnership with



Inspiring new ways

Introduction.



Jeremy Sampson
Executive Director,
Brand Finance Africa

The strength, or otherwise, of a country's economy can be measured by its brands. Not only do they generate money, they pay taxes, create jobs and act as ambassadors.

Every year London based Brand Finance values the top global brands, as well as producing rankings by sector and country. This year over 35 countries and regions are having their brands valued, putting South Africa in good company. Classified as an 'emerging economy' (EE). Therefore it's not surprising that the local economy is dominated by banks and telcos.

All the banks are jostling for position and that makes the competition good for consumers, with five in the top 10. FNB heads the traditional banks, with an impressive 22% increase in value. However the new upstart Capitec is disrupting things in a big way, is the most favoured of banks and last year alone added over 1.2 million new customers. The next twelve months should see the entry of two new banks, one from Discovery and another headed by a former Ceo of FNB. The imminent relaunch of Absa, following the withdrawal of Barclays from Africa will add to the excitement. Who said banking was boring?

In the telco field MTN remains South Africa's most valuable brand by some distance, with a footprint in 22 countries in Africa and the Middle East whilst Vodacom is number two. Cell C is moving up and a new entrant is Blue Label.

Brands and reputational issues have never been more important as has been seen so clearly in South Africa over the last year. Whether it be the nefarious activities of the Gupta family and their acolytes which impacted such companies as Bell Pottinger, Eskom, McKinsey and KPMG, or the problems experienced by Steinhoff and Tiger Brands. Companies, individuals and even countries can be caught up in these issues.

South Africa under the new leadership of President Cyril Ramaphosa now has the opportunity to leave behind the last decade of little or no growth and move ahead. The world will not wait for South Africa. One way to turbo charge the economy, as demonstrated by China, is by developing and investing in home grown brands and also either acquiring or buying into international brands.

Foreword.



David Haigh
CEO, Brand Finance

What is the purpose of a strong brand: to attract customers, to build loyalty, to motivate staff? All true, but for a commercial brand at least, the first answer must always be 'to make money'.

Huge investments are made in the design, launch, and ongoing promotion of brands. Given their potential financial value, this makes sense. Unfortunately, most organisations fail to go beyond that, missing huge opportunities to effectively make use of what are often their most important assets. Monitoring of brand performance should be the next step, but is often sporadic. Where it does take place, it frequently lacks financial rigour and is heavily reliant on qualitative measures, poorly understood by non-marketers.

As a result, marketing teams struggle to communicate the value of their work and boards then underestimate the significance of their brands to the business. Sceptical finance teams, unconvinced by what they perceive as marketing mumbo jumbo, may fail to agree necessary investments. What marketing spend there is, can end up poorly directed as marketers are left to operate with insufficient financial guidance or accountability. The end result can be a slow but steady downward spiral of poor communication, wasted resources, and a negative impact on the bottom line.

Brand Finance bridges the gap between marketing and finance. Our teams have experience across a wide range of disciplines from market research and visual identity to tax and accounting. We understand the importance of design, advertising, and marketing, but we also believe that the ultimate and overriding purpose of brands is to make money. That is why we connect brands to the bottom line.

By valuing brands, we provide a mutually intelligible language for marketing and finance teams. Marketers then have the ability to communicate the significance of what they do, and boards can use the information to chart a course that maximises profits. Without knowing the precise, financial value of an asset, how can you know if you are maximising your returns? If you are intending to license a brand, how can you know you are getting a fair price? If you are intending to sell, how do you know what the right time is? How do you decide which brands to discontinue, whether to rebrand and how to arrange your brand architecture? Brand Finance has conducted thousands of brand and branded business valuations to help answer these questions.

Brand Finance's research revealed the compelling link between strong brands and stock market performance. It was found that investing in highly-branded companies would lead to a return almost double that of the average for the S&P 500 as a whole.

Acknowledging and managing a company's intangible assets taps into the hidden value that lies within it. The following report is a first step to understanding more about brands, how to value them and how to use that information to benefit the business.

The team and I look forward to continuing the conversation with you.

About Brand Finance.

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

Brand Finance was set up in 1996 with the aim of 'bridging the gap between marketing and finance'. For more than 20 years, we have helped companies and organisations of all types to connect their brands to the bottom line.

We pride ourselves on four key strengths:

- Independence
- Technical Credibility
- Transparency
- Expertise.

Brand Finance puts thousands of the world's biggest brands to the test every year, evaluating which are the strongest and most valuable.

For more information, please visit our website:

www.brandfinance.com



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For further information on Brand Finance®'s services and valuation experience, please contact your local representative:

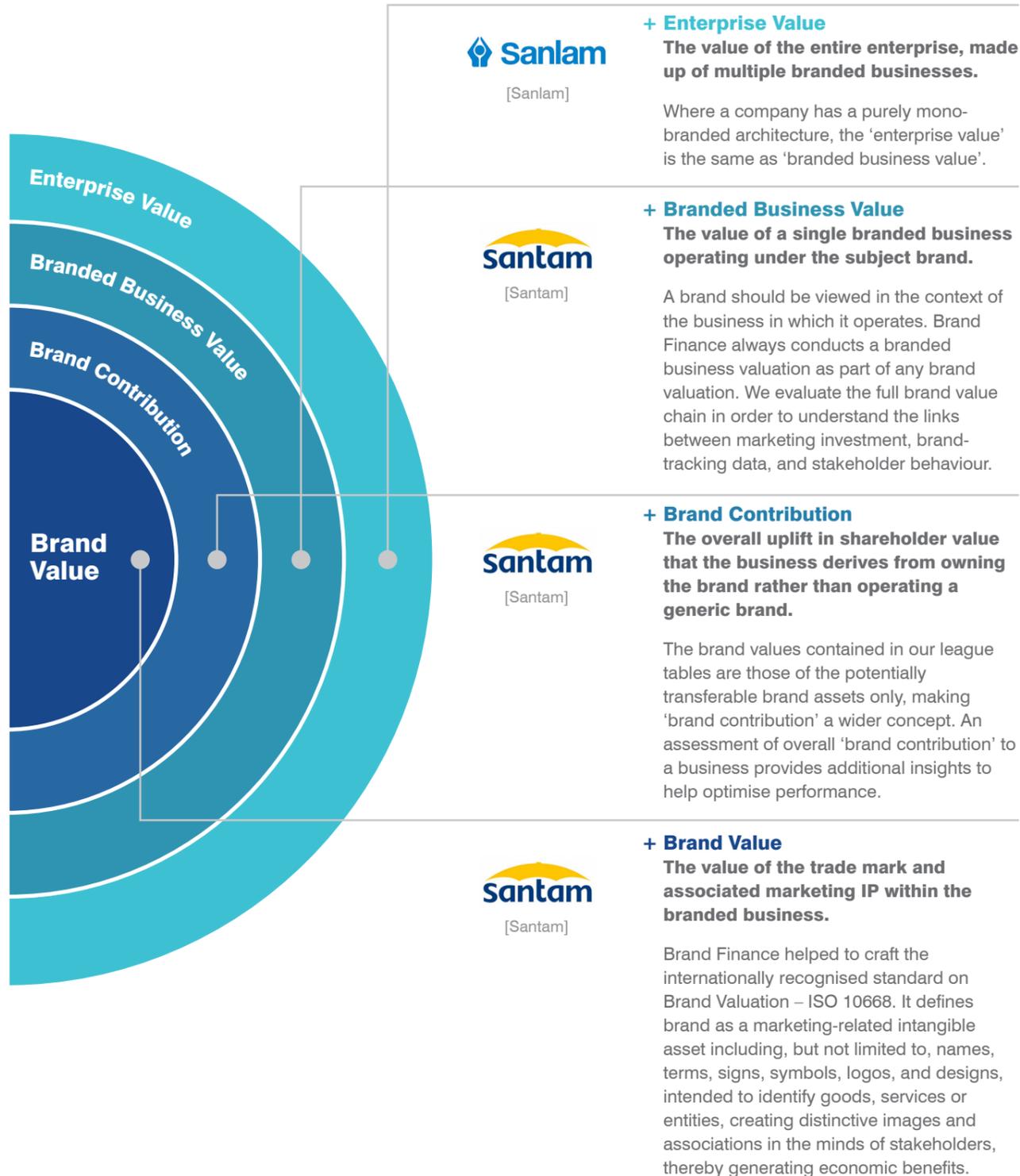
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Definitions.

Brand Value



Brand Strength

Brand Strength is the efficacy of a brand's performance on intangible measures, relative to its competitors.

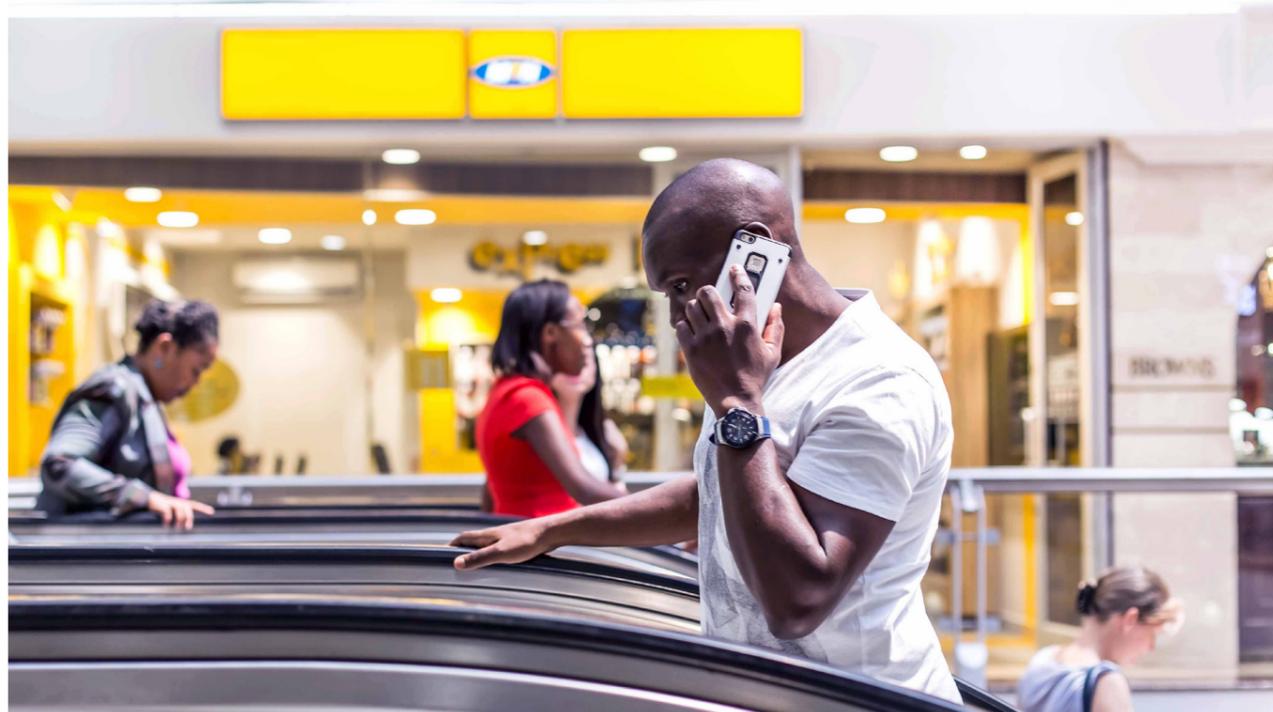
Each brand is assigned a Brand Strength Index (BSI) score out of 100, which feeds into the brand value calculation. Based on the score, each brand is assigned a corresponding rating up to AAA+ in a format similar to a credit rating.

In order to determine the strength of a brand, we look at Marketing Investment, Stakeholder Equity, and the impact of those on Business Performance.

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



Executive Summary.



MTN: SA's Most Valuable Brand

MTN's brand value has grown by 8% over the last year to R44.2 billion, maintaining its leadership as South Africa's most valuable brand, according to the latest report by Brand Finance, the world's leading independent brand valuation and strategy consultancy. MTN's brand value was boosted by a solid overall performance for the year, despite challenging economic conditions and regulatory challenges in some markets.

MTN's brand value grew primarily because of customers spending more on data services, consistent with a global trend of mobile phones being used to transmit more data at the expense of traditional voice traffic. This additional revenue growth is a strong return on the investment that MTN has made in improving data quality and capacity in its network, although this growth in revenue from data was tempered by the Cameroon government introducing a temporary data network shutdown in some regions of that country early last year. As a result, MTN's overall revenue grew by 7.2% last year, with data revenue growing by 34.2%. In recognition of MTN's increasingly strong leadership position in telecommunication services throughout Africa

“Last year we noted the value of the South African 50 top brands was R395 bn, showing a growth of 3% on 2016, so outpacing the growth of the country's economy. This year the value has jumped by 8% to R426 bn as the economy shows signs of recovery from the Zuma years. The potential for South Africa going forward is huge, especially as new brands such as Capitec emerge.”

Jeremy Sampson
Executive Director, Brand Finance Africa

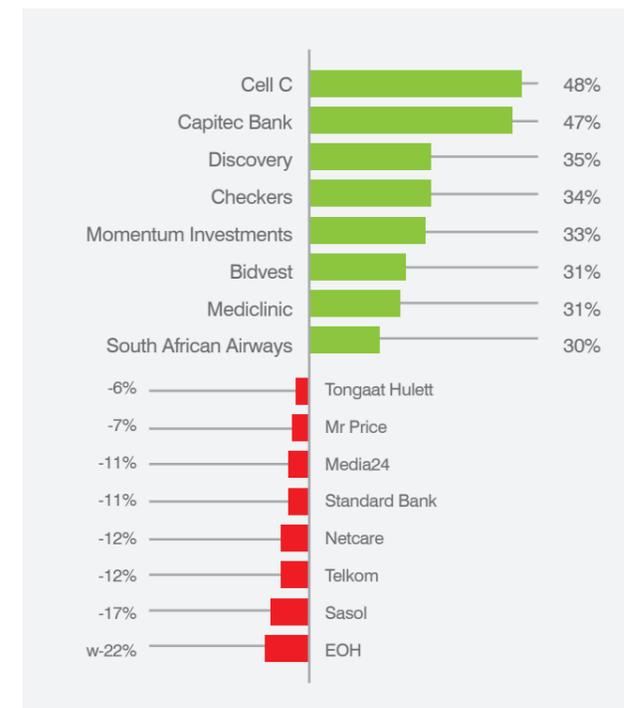
and the other countries it operations, and because of their increasingly resilient network investments, MTN's brand strength rating has been upgraded from AA+ to AAA-. While their existing network infrastructure will be challenged by a transition from 4G to 5G mobile phone services over the long-term, their current brand strength will put them in a strong position to compete in the future

First National Bank jumps up rankings as Sasol drops

First National Bank was the big winner over the last year with its brand value rising 22% to R19.4 billion. This earned First National a jump from being South Africa's 7th biggest brand to now becoming the 3rd most valuable brand in the country.

In addition, it has now become South Africa's most valuable bank brand, just ahead of ABSA (up 3% to R18.9 billion) and Standard Bank (down 11% to R18.5 billion). Despite facing the same broader challenging macroeconomic environment, First National Bank has particularly focused on cross-selling other financial services to its customers, allowing its brand value growth to outpace its closest competitors.

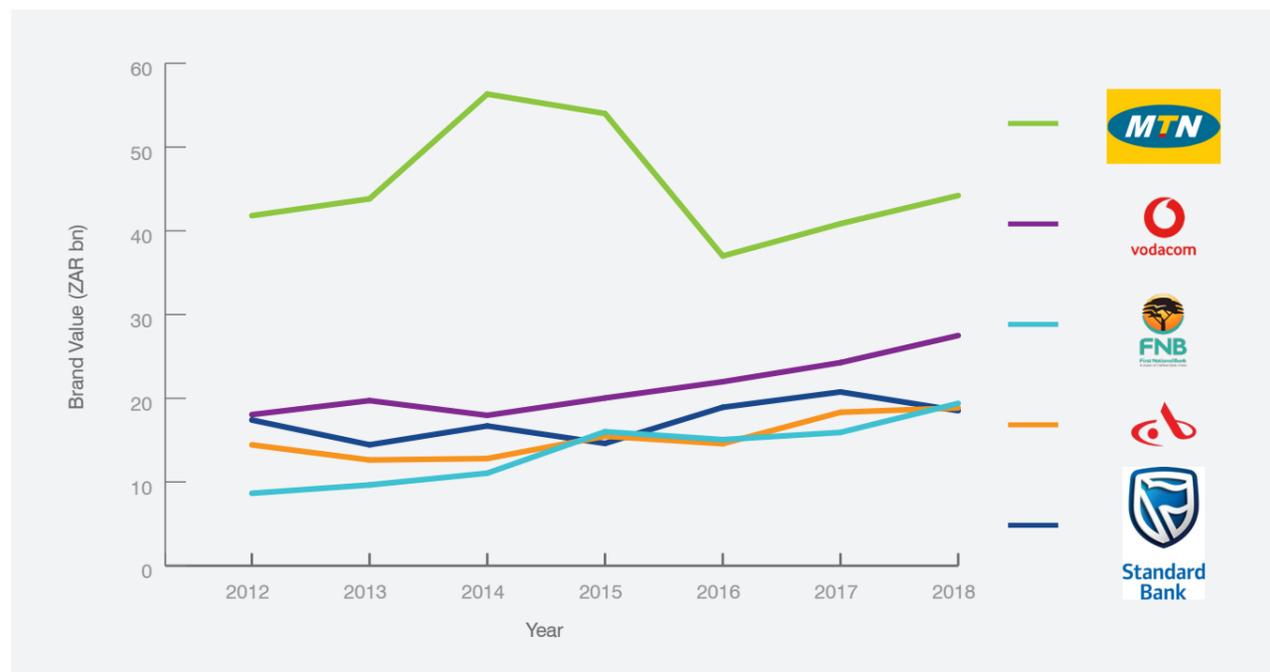
Brand Value Change 2017-2018 (%)



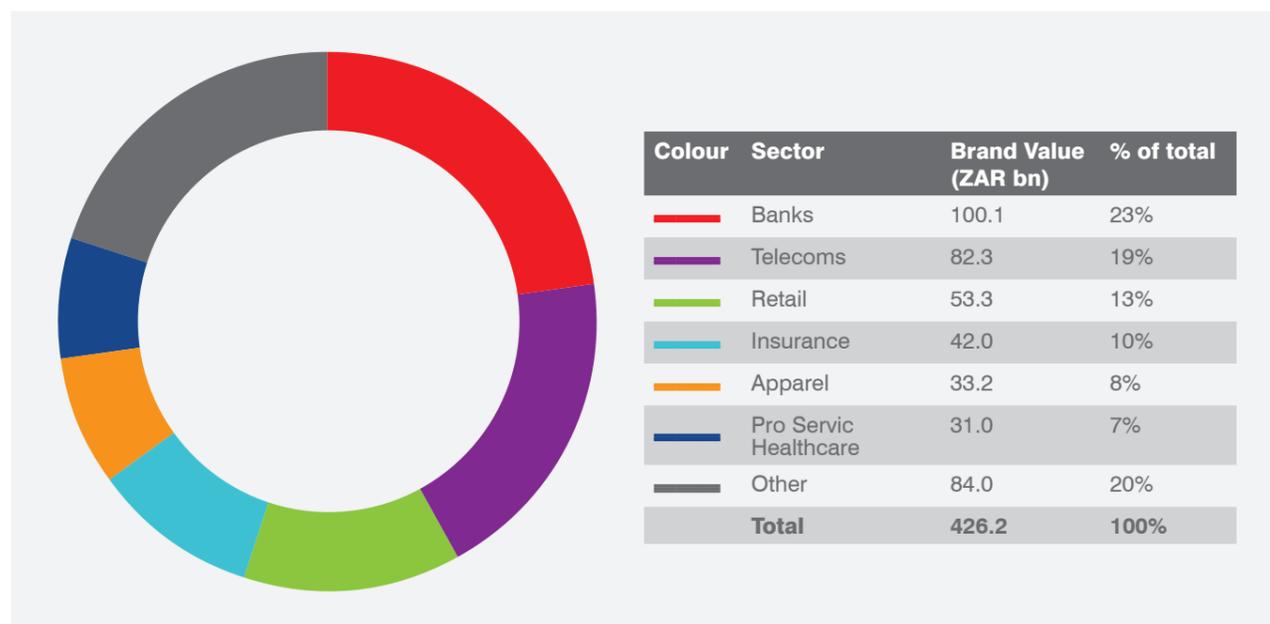
Top 10 Most Valuable Brands

	1 Rank 2018: 1 2017: 1 → BV 2018: R44,2bn BV 2017: R40,8bn 8% Brand Rating: AAA-
	2 Rank 2018: 2 2017: 2 → BV 2018: R27,4bn BV 2017: R24,2bn 13% Brand Rating: AA+
	3 Rank 2018: 3 2017: 7 ↑ BV 2018: R19,3bn BV 2017: R15,9bn 22% Brand Rating: AAA-
	4 Rank 2018: 4 2017: 6 ↑ BV 2018: R18,8bn BV 2017: R18,3bn 3% Brand Rating: AA+
	5 Rank 2018: 5 2017: 3 ↓ BV 2018: R18,5bn BV 2017: R20,7bn -11% Brand Rating: AAA-
	6 Rank 2018: 6 2017: 5 ↓ BV 2018: R18,1bn BV 2017: R18,3bn -1% Brand Rating: AA+
	7 Rank 2018: 7 2017: 4 ↓ BV 2018: R15,6bn BV 2017: R19,0bn -17% Brand Rating: AA-
	8 Rank 2018: 8 2017: 8 → BV 2018: R14,8bn BV 2017: R13,7bn 8% Brand Rating: AA
	9 Rank 2018: 9 2017: 10 ↑ BV 2018: R14,8bn BV 2017: R12,8bn 16% Brand Rating: AA+
	10 Rank 2018: 10 2017: 9 ↓ BV 2018: R14,3bn BV 2017: R13,5bn 6% Brand Rating: AA-

Brand Value Over Time



Brand Value by Sector



Sasol lost significant brand value, dropping 17% to R15.7 billion. Sasol’s exports are particularly vulnerable to exchange rate changes, and the value of the strong Rand relative to the US dollar reduced Sasol’s operating profit by 11%. On the other hand, strong global oil and chemical prices helped offset some of these challenges. In addition, Sasol’s Canadian shale oil opportunities have been devalued due to a forecast decrease in US gas prices over the long-term. The current US Government has spoken publicly about a focus on increasing domestic energy production, which reduces opportunities for Sasol to export into the USA.

Capitec Bank is South Africa’s strongest brand

In addition to measuring overall brand value, Brand Finance also evaluates the relative strength of brands, based on factors such as marketing investment, familiarity, loyalty, staff satisfaction, and corporate reputation. Along with the level of revenues, brand strength is a crucial driver of brand value. According to these criteria, Capitec Bank (brand value up 35% to R6.8 billion) became South Africa’s strongest brand, taking over from First National Bank. Capitec’s brand strength has benefited from positive perceptions amongst its core customer base, which is consistent with their introduction of more unsecured credit offerings with interest rates as low as 12.9% in some circumstances. A focus on reducing legal and administration costs are particularly attractive to their client base, which grew by 1.2 million clients over the last year.

OUTsurance and Cell C achieve fastest growing brand values

Insurance brand OUTsurance (brand value up 48% to R2.4 billion) and telecoms brand Cell C (up 47% to R3.7 billion) recorded the fastest growing brand values over the last year amongst South Africa’s most valuable brands. While OUTsurance has faced significant challenges in South Africa’s domestic market, it has achieved notable success in Australia, New Zealand and the UK. Cell C, however, is bouncing back from a tough trading conditions which led to the recapitalisation of the business in 2016. Cell C’s focus on the prepaid market has benefited, like MTN, from increased data usage by mobile users.

Top 10 Strongest Brands

	BSI Score 85.0
	BSI Score 82.9
	BSI Score 81.9
	BSI Score 81.7
	BSI Score 79.1
	BSI Score 79.1
	BSI Score 78.1
	BSI Score 77.8
	BSI Score 76.4
	BSI Score 75.2

Brand Finance South Africa 50 (ZAR m)

Top 50 most valuable South African brands 1-50

Rank 2018	Rank 2017	Brand name	Country	Brand value (ZAR m) 2018	% change	Brand value (ZAR m) 2017	Brand rating 2018	Brand rating 2017
1	1	MTN	South Africa	44,210	+8%	40,846	AAA-	AA+
2	2	Vodacom	South Africa	27,493	+13%	24,259	AA+	AA
3	7	First National Bank	South Africa	19,389	+22%	15,923	AAA-	AAA-
4	6	ABSA	South Africa	18,852	+3%	18,328	AA+	AA
5	3	Standard Bank	South Africa	18,515	-11%	20,757	AAA-	AA+
6	5	Woolworths	South Africa	18,142	-1%	18,360	AA+	AAA-
7	4	Sasol	South Africa	15,689	-17%	19,009	AA-	AA-
8	8	Investec	South Africa	14,870	+8%	13,781	AA	AA
9	10	Nedbank	South Africa	14,828	+16%	12,820	AA+	AA+
10	9	MultiChoice	South Africa	14,322	+6%	13,519	AA-	AA-
11	11	Castle	Belgium	🔒	🔒	🔒	🔒	🔒
12	12	Shoprite	South Africa	🔒	🔒	🔒	🔒	🔒
13	14	Mondi	South Africa	🔒	🔒	🔒	🔒	🔒
14	16	Mediclinic	South Africa	🔒	🔒	🔒	🔒	🔒
15	New	Aspen Group	South Africa	🔒	🔒	🔒	🔒	🔒
16	17	Old Mutual	United Kingdom	🔒	🔒	🔒	🔒	🔒
17	13	Spar	South Africa	🔒	🔒	🔒	🔒	🔒
18	18	Sanlam	South Africa	🔒	🔒	🔒	🔒	🔒
19	21	Discovery	South Africa	🔒	🔒	🔒	🔒	🔒
20	19	Pick 'n Pay	South Africa	🔒	🔒	🔒	🔒	🔒
21	26	Checkers	South Africa	🔒	🔒	🔒	🔒	🔒
22	28	Capitec	South Africa	🔒	🔒	🔒	🔒	🔒
23	25	Sappi	South Africa	🔒	🔒	🔒	🔒	🔒
24	20	Mr Price	South Africa	🔒	🔒	🔒	🔒	🔒
25	22	Netcare	South Africa	🔒	🔒	🔒	🔒	🔒
26	27	Liberty	South Africa	🔒	🔒	🔒	🔒	🔒
27	24	Telkom	South Africa	🔒	🔒	🔒	🔒	🔒
28	30	Rainbow Chicken	South Africa	🔒	🔒	🔒	🔒	🔒
29	34	Bidvest	South Africa	🔒	🔒	🔒	🔒	🔒
30	31	Truworths	South Africa	🔒	🔒	🔒	🔒	🔒
31	29	Media24	South Africa	🔒	🔒	🔒	🔒	🔒
32	New	Engen	South Africa	🔒	🔒	🔒	🔒	🔒
33	37	Clicks	South Africa	🔒	🔒	🔒	🔒	🔒
34	35	Rand Merchant Bank	South Africa	🔒	🔒	🔒	🔒	🔒
35	42	Cell C	South Africa	🔒	🔒	🔒	🔒	🔒
36	32	Momentum	South Africa	🔒	🔒	🔒	🔒	🔒
37	41	Santam	South Africa	🔒	🔒	🔒	🔒	🔒
38	39	Wesbank	South Africa	🔒	🔒	🔒	🔒	🔒
39	43	Foschini	South Africa	🔒	🔒	🔒	🔒	🔒
40	50	OUTsurance	South Africa	🔒	🔒	🔒	🔒	🔒
41	48	South African Airways	South Africa	🔒	🔒	🔒	🔒	🔒
42	47	Life Healthcare	South Africa	🔒	🔒	🔒	🔒	🔒
43	44	Sasko	South Africa	🔒	🔒	🔒	🔒	🔒
44	38	EOH	South Africa	🔒	🔒	🔒	🔒	🔒
45	46	Hi Fi Corporation	South Africa	🔒	🔒	🔒	🔒	🔒
46	New	Clover	South Africa	🔒	🔒	🔒	🔒	🔒
47	49	Growthpoint	South Africa	🔒	🔒	🔒	🔒	🔒
48	45	Tongaat Hulett	South Africa	🔒	🔒	🔒	🔒	🔒
49	New	Blue Label Telecom	South Africa	🔒	🔒	🔒	🔒	🔒
50	33	Country Road	South Africa	🔒	🔒	🔒	🔒	🔒

Brand South Africa.



Ms Linda Magapatona-Sangarate
Chief Marketing Officer,
Brand South Africa



Inspiring new ways

South Africa is a brand, the country's Nation Brand and Brand South Africa's responsibility is to develop strategies to manage the reputation through marketing and communications. We have to portray a positive image of the country in order to enhance our global competitiveness. We can only achieve this through showcasing South Africa's innovations and highlighting the country's strengths, and investment potential.

The country's commercial brands play a key role in showing off a country capabilities. They tell the story of a strong Nation Brand which is experienced by both domestic and international audiences.

We are delighted to continuously support and play a role in South Africa's Top 50 Most Valuable Brands Announcement. Every year, leading brands are evaluated to determine the most valuable brands, these brands support and carry positive sentiments of Brand South Africa's mandate worldwide. Over the last few months, the country has seen progressive transitions of renewed hope, it is imperative now more than ever that we incessantly build confidence and celebrate these brands that assist in positioning the nation positively and inspire new ways.

"A Nation Brand is more than its constituent parts. Essentially it can be viewed as an outcome, or result, of a country's combined geographical, demographic, economic, societal, cultural, state- and private sector features. In the case of South Africa's Nation Brand, it is an asset that has to be managed through varied methodologies in a highly competitive global marketplace." – Brand South Africa's General Manager for Research Dr Petrus De Kock

The value and quality of these brands is a reflection of the country's brand, we thank corporate South Africa for playing its part in good governance, delivering value proposition to consumers and we look forward to honouring the Top 50 most valuable brands for years to come.

Methodology.

Brand Finance calculates the values of the brands in its league tables using the Royalty Relief approach – a brand valuation method compliant with the industry standards set in ISO 10668.

This involves estimating the likely future revenues that are attributable to a brand by calculating a royalty rate that would be charged for its use, to arrive at a 'brand value' understood as a net economic benefit that a licensor would achieve by licensing the brand in the open market.

The steps in this process are as follows:

- 1 Calculate brand strength using a balanced scorecard of metrics assessing Marketing Investment, Stakeholder Equity, and Business Performance. Brand strength is expressed as a Brand Strength Index (BSI) score on a scale of 0 to 100.
- 2 Determine royalty range for each industry, reflecting the importance of brand to purchasing decisions. In luxury, the maximum percentage is high, in extractive industry, where goods are often commoditised, it is lower. This is done by reviewing comparable licensing agreements sourced from Brand Finance's extensive database.
- 3 Calculate royalty rate. 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 Determine brand-specific revenues by estimating a proportion of parent company revenues attributable to a brand.
- 5 Determine forecast revenues using a function of historic revenues, equity analyst forecasts, and economic growth rates.
- 6 Apply the royalty rate to the forecast revenues to derive brand revenues.
- 7 Brand revenues are discounted post-tax to a net present value which equals the brand value.



Understand Your Brand's Value.

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 business performance and offers a cost-effective way to gaining a better understanding of your position against competitors.

What is a Brand Value Report?

Brand Valuation Summary

- + Internal understanding of brand
- + Brand value tracking
- + Competitor benchmarking
- + Historical brand value

Brand Strength Index

- + Brand strength tracking
- + Brand strength analysis
- + Management KPIs
- + Competitor benchmarking

Royalty Rates

- + Transfer pricing
- + Licensing/franchising negotiation
- + International licensing
- + Competitor benchmarking

Cost of Capital

- + Independent view of cost of capital for internal valuations and project appraisal exercises

Customer Research

- + Utilities
- + Insurance
- + Banks
- + Telecoms

For more information regarding our Brand Value Reports, please contact:

Richard Haigh
Managing Director, Brand Finance
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What are the benefits of a Brand Value Report?



Insight

Provide insight as to how the brand is performing vs. key competitors on underlying measures and drivers of brand value and brand strength.



Strategy

Understand where brand value is being generated by region and channel in order to identify areas of opportunity that warrant further investigation.



Benchmarking

Track year-on-year changes to brand value and set long-term objectives against which high-level brand performance can be benchmarked.



Education

Provide a platform of understanding which the company can use to educate employees on the importance of the brand.



Communication

Communicate your brand's success to shareholders, customers, and other strategically selected audiences.



Understanding

Understand and appreciate the value of your brand as an asset of the business.

Consulting Services.

1. Valuation: What are my intangible assets worth?

Valuations may be conducted for technical purposes and to set a baseline against which potential strategic brand scenarios can be evaluated.

- + Branded Business Valuation
- + Trademark Valuation
- + Intangible Asset Valuation
- + Brand Contribution

2. Analytics: How can I improve marketing effectiveness?

Analytical services help to uncover drivers of demand and insights. Identifying the factors which drive consumer behaviour allows an understanding of how brands create bottom-line impact.

- Market Research Analytics +
- Return on Marketing Investment +
- Brand Audits +
- Brand Scorecard Tracking +

3. Strategy: How can I increase the value of my branded business?

Strategic marketing services enable brands to be leveraged to grow businesses. Scenario modelling will identify the best opportunities, ensuring resources are allocated to those activities which have the most impact on brand and business value.

- Brand Governance +
- Brand Architecture & Portfolio Management +
- Brand Transition +
- Brand Positioning & Extension +

4. Transactions: Is it a good deal? Can I leverage my intangible assets?

Transaction services help buyers, sellers, and owners of branded businesses get a better deal by leveraging the value of their intangibles.

- + M&A Due Diligence
- + Franchising & Licensing
- + Tax & Transfer Pricing
- + Expert Witness

Brand & Business Value

MARKETING

We help marketers to connect their brands to business performance by evaluating the return on investment (ROI) of brand-based decisions and strategies.

FINANCE

We provide financiers and auditors with an independent assessment on all forms of brand and intangible asset valuations.

TAX

We help brand owners and fiscal authorities to understand the implications of different tax, transfer pricing, and brand ownership arrangements.

LEGAL

We help clients to enforce and exploit their intellectual property rights by providing independent expert advice in- and outside of the courtroom.



Communications Services.

We offer a variety of services to help communicate your brand's success.

How we can help

- Your Brand Value**
Explain and discuss your brand's performance in more depth.
- Press Release**
Assist with the creation of a press release communicating your brand's success.
- CEO Quote**
Supply a quote in recognition of your brand's performance for you to use in external and internal communications.
- Social Media**
Coordinate with your social media activity to communicate your brand's success more effectively.
- Awards**
Produce an accolade plaque and hand-written certificates, personally signed by our CEO, to recognise your brand's performance.
- Advertising**
Allow full use of the Brand Finance logo on your ad designs and create a bespoke digital endorsement stamp for your website and investor relations use.

Brand Finance[®]

Strongest Global Brand 2018

Your Brand

Example digital endorsement stamp for use on your website as well as in investor relations and advertising, to recognise your brand's performance.



BRAND EXCHANGE[®]

WHERE BRANDS MEET FINANCE

BECOME A MEMBER

A contemporary and exclusive members' club & events venue in the heart of the City of London

Characterful space for meetings and private events
Members' events with focus on marketing and branding
Discounted room hire for members



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Brand Exchange is a member of the Brand Finance plc group of companies

Brand Dialogue[®]



Value-Based Communications

We execute strategic communications programmes to optimise the value of your business and to enhance brand perception among stakeholders.

SERVICES

- Research and Insights
- Project Management and Agency Steering
- Content and Channel Strategy
- Integrated Communications Planning and Execution
- Communications Workshops

For more information, contact enquiries@brand-dialogue.co.uk or visit www.brand-dialogue.co.uk

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