BRANDZ TOP 50
MOST VALUABLE GERMAN BRANDS 2019
FIRST-TIME INCLUSIONS
The highest-ranking newcomers to the ranking this year are:

#13 #18

#21
#23
#24

GETTING IT RIGHT
Some of the leading brands in the Top 50 on key factors that strengthen brand value:

- BRAND PURPOSE
- INNOVATION
- COMMUNICATIONS
- EXPERIENCE
- LOVE

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**WELCOME**

6 Strong Brands Thrive As Confidence Grows
by David Roth, CEO The Store WPP, EMEA & Asia, Chairman BrandZ™ and BAV

**1 INTRODUCTION**

10 Overview
12 Highlights
14 The Top 5 Learnings For Marketers
16 Cross Category Trends
18 Economy and Demographics
20 Key Takeaways
26 Media
30 Brand Value
32 Brand Contribution
34 Brand Health
38 Category Growth
40 Love and Emotional Connections

**2 THOUGHT LEADERSHIP**

46 Let’s Creativat! by Martin Blach, Bernd Heusinger and Marcel Loko Hirschen Group
48 How Do We Win Over Gen Z? by Jchai Sinthuaree and Isabelle Schnellbügel Ogilvy
50 It’s About The Makers by Jan Peter Reineke Wavemaker
52 How Do You Transform Disruptors? by Katja Brandt Mindshare
54 In The Driving Seat by Markus Eberl Kantar
56 The Reinvention Of Customer Care by Ron Hofer SYZYGY and USEEDS

**3 BRANDZ™ GERMAN TOP 50**

60 The German Top 50 Ranking
62 Brand Profiles 1-15
70 WPP Company Expert Insights
72 Brand Profiles 17-32
80 WPP Company Expert Insights
82 Brand Profiles 33-50
91 WPP Company Expert Insights

**4 BRAND BUILDING BEST PRACTICES**

94 Brands On Demand by Christian Thron deepblue networks
96 Fail Fast? No Thanks by Jan Pechmann differrent and Sven Wollner GroupM
100 Evolution Based On DNA by Kathleen Ix Superunion

**5 BRAND GERMANY**

105 Made In Germany
106 How The World Views Germany
108 How Do We Measure A Country?
110 Top Of The World
112 Surpassing Expectations
113 Making It Work

**6 RESOURCES**

116 BrandZ™ Brand Valuation Methodology
120 BrandZ™ Genome Mapping
126 WPP Company Contributors
129 Kantar in Germany
130 WPP in Germany
131 BrandZ™ Online & Mobile
132 WPP Company Brand Building Experts
133 BrandZ™ German Top 50 Team
134 The BrandZ™ Brand Valuation Contacts
In this report, we go beyond the ranking itself to understand the varied strengths of the best performers. Our expert analysis covers the many factors that together fuel brand strength and strong financial returns – two key business indicators that BrandZ™ research globally over more than a decade has proved are intricately linked.

But our analysis of this year’s ranking also reveals an uncomfortable truth: that while consumers worldwide know they can count on certain things from German brands – function, reliability, customer service – there’s something missing, particularly among the biggest brands.

It’s the spark of excitement that comes from feeling real love for a brand. Feeling that a brand is fun to be with; that it shares your sense of humor; that it offers warmth and has emotional, memorable stories to tell.

German brands make sense for consumers, without doubt. People know very clearly why they should buy them, but they are less likely to feel the same deep, emotional connection with the most valuable brands that strong brands from other markets are able to generate.

Head and heart decisions don’t have to be at odds with one another. Think of brands like IKEA and Pampers. They make a lot of practical sense, but they also feel right to many people. They make you smile. In Germany, the most loved brands include Google, Amazon, Samsung and HiPP.

When people have begun to take quality for aside from making money. This is one of the most important aspects of nurturing love is having a clear brand purpose – something a brand stands for aside from making money. This is becoming increasingly important to consumers who have begun to take quality as a given; they want something more that resonates with what they want to say about themselves.

It’s also about providing emotion and warmth at every point where the consumer meets the brand – great stores, packaging, customer service and advertising.

In this report, we look at emerging consumer trends that are shaping new behavior, and present insight from across our rankings and reports into the leading brands in the following markets: China, India, Indonesia, France, the UK, Spain, Italy, Australia and South Africa. All are available from www.BrandZ.com and through our interactive mobile apps, at www.BrandZ.com/mobile.

To talk to someone about how WPP’s expertise could help your brand, feel free to contact any of the WPP companies who have contributed to this report – their details are on page 128. I’d also be delighted to hear from you directly.

Sincerely, David Roth
davidroth@wpp.com

WELCOME

STRONG BRANDS THRIVE AS CONFIDENCE GROWS

YET CONSUMERS ARE STILL LOOKING FOR LOVE

Thank you for joining us as we celebrate the brands that have made it into the second annual WPP BrandZ™ Top 50 Most Valuable German Brands 2019 ranking.

These are not just incredibly strong brands in Germany, but many are global leaders in their categories, synonymous with levels of excellence that clearly justify what is often premium pricing. They have grown by being pioneers and innovators – in many cases showing the rest of the world what it means to build innovation not just into a department but into a brand’s DNA. At BrandZ™, we see the clear links between innovative brands and strong, growing brands, and the brands in the German Top 50 provide yet more evidence of the power of innovation.

In this report, we explore a couple of the ways in which brands can create the conditions in which love can thrive.

This report doesn’t offer a love potion to remedy the apparent lack of love, but we do explore a couple of the ways in which brands can create the conditions in which love can thrive.

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INTRODUCTION

Overview
Highlights
Cross-Category Trends
Economy and Demographics
Key Takeaways
Media
Brand Value
Brand Contribution
Brand Health
Category Growth
Love and Emotional Connections
Confidence in Germany’s economic outlook has climbed for the second year in a row and is now among the highest globally. In fact, 78 percent of Germans say that things are going “fairly well or very well” financially for their country, compared to a global average of just 43 percent.

Confidence in the country’s financial standing is now at a five-year high. And when asked about their own personal financial situation, 56 percent also say things are going well, up two percentage points from a year ago, and again above the global average (50 percent).

These perceptions broadly reflect the reality of Germany’s economic situation. While trade conflict between the US and the European Union has created a degree of uncertainty, unemployment has been well under 5 percent for several years and shows no sign of rising.

GDP growth has been ticking along at 2.2 percent a year for the past two years, and is forecast to be 1.9 percent for both 2018 and 2019 – fairly strong by Western European standards.

The European Commission reports that escalating protectionism in key world markets – most notably the US – would be likely to dampen demand for German exports, but for now business investment is still growing, construction activity is strong, and willingness to hire is high.

The continued strength in the labor market is leading to wage growth, and that is likely to boost private consumption – good news for brands.

Ms Merkel said the results showed that even when the economy was thriving, and employment was high, voters wanted more. She said there had been an erosion of trust and confidence in politics. Her takeaway after a poor showing in elections in the prosperous southern state of Bavaria was that she “must better ensure that this trust is there and also make the results of our work visible.”

Kantar research shows that Germans are significantly less concerned about their financial security and corruption than the global average. What worries them more is data security, having someone to care for them in old age, and the fear of being caught up in a terrorist attack.

They are also concerned about the changing nature of German life. There are now more people with foreign citizenship living in Germany than ever before – around one in eight people – following a recent influx of asylum seekers and migrants from other EU countries.

Kantar research shows 63 percent of people are wary about how this is changing the established values and way of life in Germany – a rise of two percentage points in the past year.

“The continued strength in the labor market is leading to wage growth, and that is likely to boost private consumption – good news for brands.”
The combined brand value of the 50 brands to make the 2019 Top 50 is almost $341 billion—an increase of 11 percent over the value of the leading 50 German brands in 2018. The rate of growth is slower than that of French brands over the past year but more than double the rate enjoyed by the leading UK brands. German brands might not be fastest-growing in the region, but they are the most valuable; collectively, they rank behind only China and the USA for combined brand value.

BrandZ™ uses five key indicators of health to determine the overall wellbeing of a brand. German brands perform well when compared to the leading brands from other markets, and those that we class as most healthy have outperformed the rest over the past year in terms of value growth. The healthiest have grown 5 percent in brand value, while the most “frail” have grown by just 1 percent.

Germany has risen from fourth to third place in the world on the annual global “Best Countries” ranking, developed in part by WPP’s VMLY&R BAV Group. The country has climbed above the UK with its strong reputation for openness, high standards of education and its political influence internationally. Germany is first for entrepreneurship out of 80 countries, followed by Japan, the US, the UK and Switzerland.

The fast-growing software specialist SAP is Germany’s most valuable brand for the second year running, with a brand value of US$50.937 million in 2019. This represents an increase in value of 4 percent since last year, reflecting the fact that SAP’s client base has expanded by 78,000 in the past year alone, taking the total number to over 413,000 in over 180 countries. The brand’s promise goes beyond its services: “SAP helps the best-run businesses make the world run better,” its 2018 campaign says. SAP recently announced the $8 billion acquisition of survey software business Qualtrics.

The laundry detergent Persil is among 14 new brands to make the Top 50 in a newly expanded study that now includes 18 categories. Continental, best known for car tires, is the highest-ranking new arrival, worth over $8 billion, and making its BrandZ™ debut in 13th place; other newcomers include car rental giant Sixt, fabric softener brand Lenor, the frozen food delivery service bofrost®, and travel agency AIDA, among many others.
INTRODUCTION

TOP 5 LEARNINGS FOR MARKETERS

1. A HEALTHY BRAND MEANS A VALUABLE BRAND
   - There’s a strong correlation between the BrandZ™ measure of good health, what we call the “Vitality Quotient” (vQ), and growing brand value. And this year’s German ranking shows that health isn’t predetermined by the business sector in which a brand operates. The healthiest brands this year are highly diverse – including DHL, Lufthansa, NIVEA and ALDI – showing that when brands give themselves a workout, they can build up brand muscle in the right places to deliver value.

2. BE DRIVEN BY SOMETHING OTHER THAN PROFIT
   - The brands that have a strong purpose beyond what they produce or deliver every day are viewed more favorably by consumers, and ultimately generate stronger value growth. A brand’s purpose must be more than a PR statement every now and then, which doesn’t just fail to impress consumers, it can lead to a backlash. Have a genuine mission to do something for the greater good, make sure you do something about it, then make sure it is clearly seen as part of the brand’s DNA.

3. TRUST AND LOVE ARE CLOSELY LINKED
   - When German brands start thinking about how to address the lack of love they inspire among consumers, they would do well to start by thinking about trust. There’s a strong correlation between those brands that people trust, and the ones they fall in love with. Love matters not just because every brand wants to be loved, but because love can sustain a brand in the mind of the consumer in the times when it’s not announcing new products and innovations.

4. BE DIFFERENT, IN A WAY CONSUMERS CARE ABOUT
   - Being different to other brands is one way of standing out from the crowd, but it’s important that what sets a brand apart is seen as important to the people it’s targeting. We call this “meaningful difference” and it’s this that makes a difference to success in the market and contributes to a rise in brand value.

5. CONSUMER LOVE REQUIRES EMOTION
   - German brands have many strengths that appeal to consumers’ rational mind, but the biggest often overlook the need to form emotional bonds and communicate with creativity. And it’s emotional, creative communications that leads to brand love. Be warm and friendly, and love may follow.

“There’s a strong correlation between those brands that people trust, and the ones they fall in love with.”
INTRODUCTION

CROSS-CATEGORY TRENDS

1. SHOPPERS ARE ON A MISSION – YOU NEED TO KNOW WHICH ONE

The reason someone starts browsing or shopping – and the extent to which they've already made up their mind about a product or a brand – means they can enter the process with a range of different mindsets, each one affecting their hunger for a bargain, a speedy transaction or a bit of fun. Understanding these differences in approach can help brands unlock real value by adapting communications and the shopping experience – both online and in physical stores. It’s important to distinguish “decided” shoppers from those who are still open to suggestions, and to appreciate the occasion they’re buying for, and the urgency of the day’s shopping mission. Every shopping expedition – to a city center or to a computer screen – involves constant, subconscious trade-offs between time, money and energy.

2. THE AGING POPULATION IS A GOLD MINE FOR BRANDS

Around one in five people in Germany is now aged 65 or older, and while generations X, Y and Z may be hot topics for brands seeking to win over new consumers, here’s a fact that might make marketers look afresh at the more mature consumer: the number of older people in Germany has risen by nearly 37 percent in the past 20 years. There are now close to 18 million people aged 65-plus, and Germany’s low birth rate means they’re a growing demographic. As well as proving a ready market for increasingly sophisticated retirement homes, with gyms and beauty salons, they’re also buying fashion, luxury goods, high-end cars, and they’re traveling.

3. E-COMMERCE HAS ROOM TO GROW – IF THE TERMS ARE APPEALING

Germany is a highly connected market, and in some categories, the vast majority of transactions are done online. In the space of just one year, the proportion of the population using online shopping has risen from 57 percent to 70 percent. Now, 80 percent of people booking flights and 57 of those shopping for clothes do it via clicks, rather than a walk around a physical store. Yet there remains considerable scope for growth in the e-commerce market here, particularly in grocery shopping, which is growing fast but is still used by only a third of German households. What’s holding back everyone else? Shoppers say they’ll switch if the process is made simpler – so it’s easier to find what they want, from a range that’s just as broad as they’d get in a physical shop. They also want faster, free delivery, and easier access to more information about the products they’re buying.

4. TIME IS THE ULTIMATE LUXURY

The demands of daily life are leaving many people feeling like they need a break. Government surveys have shown that many parents wish they could spend more time with their children, and Kantar research in 2018 found that 59 percent of Germans (compared to 51 percent a year earlier) wished they had more time and energy to explore their creativity, both in their personal and professional lives. Technology isn’t always the answer; around a quarter of Germans think they already spend too much time on their mobile phone, and over half say they don’t want a connected device in their home, even if it would make their lives easier. Brands have an opportunity to devise creative ways to streamline services and give consumers more free time – and also to create experiences that feel like a valuable and enjoyable use of their precious time.

5. GREEN CONCERNS ARE DRIVING DECISIONS – TO A POINT

Across Western Europe, consumers are reading labels and making changes to their lifestyles with the intention of reducing their impact on the environment. Germany has a high proportion of commuters who cycle to work, for instance, both for health and environmental reasons, and over half of consumers say they try to have a positive effect on the natural world – not just by reducing waste but by buying ethically sourced products. Yet their good intentions sometimes go awry when the green option costs more – and this is particularly the case for young people, who perhaps have to be more careful about budgeting. Brands that can help make “doing the right thing” more affordable stand to do well in a market where 80 percent of young adults are concerned about the environment, but fewer than 10 percent buy eco-friendly clothing and a minority opt for Fairtrade products.
INTRODUCTION

TOP 50 MOST VALUABLE GERMAN BRANDS 2019

ECONOMY AND DEMOGRAPHICS

ECONOMY

GDP (2017)
€3,277.3BIL.

GDP per Capita (2017)
€39,649

GDP Growth Rate (2018)
1.9%

Unemployment Rate (2018)
3.5%

Main Exports
- Motor Vehicles
- Machinery
- Chemicals
- Computer & Electronic Products
- Electrical Equipment
- Pharmaceuticals
- Metals
- Transport Equipment
- Foodstuffs
- Rubber & Plastic Products

Main Trading Partners
- Austria
- Netherlands
- China
- Poland
- France
- UK
- Italy
- US

Labor Force by Occupation
- Agriculture: 1.4%
- Industry: 24.2%
- Services: 74.3%

TECHNOLOGY

Internet Users (aged 10+)
90%

Time spent per day using Media (adults)
10.6HOURS

E-commerce Spend (per year per internet user aged 10+)
€818

ECONOMY AND DEMOGRAPHICS

CENTER OF POPULATION

Berlin
3.52MIL.

Hamburg
1.79MIL.

Munich
1.45MIL.

Frankfurt
733,000

Cologne
1.069MIL.

Dusseldorf
612,000

Dortmund
586,000

Shuttgart
623,000

DEMOGRAPHICS

Population
82.8MIL.

Total Number of Households
41.3MIL.

Population by Age
- 0-14 years: 12.82%
- 15-24 years: 10.09%
- 25-54 years: 40.45%
- 55-64 years: 14.58%
- 65 years and over: 22.06%

Median Age
- Germany: 44.3
- Italy: 45.5
- France: 41.4
- UK: 40.5
- Australia: 38.7
- US: 38.1
- China: 37.4

Sources: CIA, DeStatis, GroupM, Europa
INTRODUCTION

KEY TAKEAWAYS

In the past two years, Germans’ confidence in their country’s financial future has risen 15 percentage points – a level of optimism beaten only by China. People feel globalization has helped them and their fellow citizens, and that is leading to a higher willingness to spend, particularly on big-ticket items.

There are cuts being made to the consumption of beer – especially among millennials, who are reducing alcohol consumption in the pursuit of better health. Consumers aren’t going thirsty, however, as spending on soft drinks, bottled water and smoothies is increasing. And Germany remains the third-largest consumer of alcoholic drinks per capita, though tastes are shifting towards craft beers, gin and cocktails.

COMPANY AND BRANDS ARE EXPECTED TO TAKE A POSITION ON IMPORTANT ISSUES, AND CONSUMERS INCREASINGLY SEEK OUT THOSE THAT HAVE A POINT OF VIEW ON THE THINGS THAT MATTER TO THEM. OVER HALF OF GERMANS NOW SAY THEY LIKE BRANDS THAT TAKE A STAND – A SIGNIFICANT JUMP IN JUST THE PAST YEAR. SOCIAL IMPROVEMENT, THE ENVIRONMENT, AND RESPONSIBLE SOURCING AND SUPPLY CHAINS ARE HOT AREAS OF FOCUS.

Confidence is soaring: we’ll drink to that

Companies and brands are expected to take a position on important issues, and consumers increasingly seek out those that have a point of view on the things that matter to them. Over half of Germans now say they like brands that take a stand – a significant jump in just the past year. Social improvement, the environment, and responsible sourcing and supply chains are hot areas of focus.

We’ll drink to that

Concerns about data are a big deal in Germany, with three-quarters of people worried that individuals or companies might misuse their data. In fact, it’s one of the top three worries about any issues – even ahead of job security. Be utterly transparent about how data will be used and protected, and demonstrate clear value in return for it being shared. Already, the use of ad blockers here is double the global average.

EVERYBODY LOVES A BARGAIN

A stable economy and strong jobs market mean that consumers have more money in their pockets, are able to spend in more categories, and on more premium products. But a tradition of hunting for the best value for money persists. Many shoppers – even the most affluent – seek out sales, and many prioritize price over brand names. They will pay a premium, but only if they perceive it’s clearly justified.

Everybody loves a bargain

While German brands such as adidas are leading the world in offering people the chance to customize products to their precise preferences, German consumers are less likely than most to expect this to be an option when they buy. The ability to personalize – perhaps a unique color combination or an entirely customized design – is therefore likely to be a source of delight rather than the satisfaction of an expectation.

Have it your way

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Meat’s getting the chop

Germany’s cuisine is known for delighting carnivores, but consumers here are increasingly going meat-free to benefit their health. While they’re generally sceptical about the value of so-called “superfoods”, there is a belief that vegetarianism, and veganism in particular, has lasting health benefits. So, while around 2 percent of UK residents and just over 3 percent of Americans are vegetarian, in Germany, over 4 percent say they don’t eat meat. Women, young people and those who live in cities are most likely to be vegetarian.

Diversity is changing tastes

Net immigration to Germany is over 400,000 people a year, and there are now around 8.5 million foreign citizens residing here. The most recent arrivals – over a million from Syria and Iraq under the government’s “open door” policy on refugees – along with EU citizens seeking study and work opportunities, are fueling rising demand for new products and services. The influx of Muslim consumers in particular, who now number about 5 million, creates a growing market for halal meat, clothing and personal care items.

Top 50 most valuable German brands 2019

As consumers feel more confident and have more money to spend, they’re likely to be more selective with their purchases. This is good news for German companies and brands, especially when they’re crafting their marketing messages. Germany’s top 50 brands, as calculated by brand equity firm Interbrand, include many familiar names – from automotive giants such as BMW and Audi to retailing giants like Lidl and Aldi, and financial services companies such as Allianz and Commerzbank. But there are also some surprising entries, like MC Motorsport which sits in the top 10 for the first time. This company specializes in restoring vintage cars, and its success shows how brands can use their unique selling points to stand out in a crowded market.
INTRODUCTION

TOP 50 MOST VALUABLE GERMAN BRANDS 2019

KEY TAKEAWAYS

FIT TO FULL SCREEN

While mobile phone use is close to ubiquitous, for shopping it remains largely a PC-driven market. For instance, among the people who shop for groceries online, three quarters are doing so from a computer, even if they also have a mobile. A significant number also use a tablet, which leaves only around 14 percent who are shopping from their phone. This is quite a different dynamic to other markets, so communications and online stores need to be tailored accordingly.

HAVE A GOOD TIME

If great brands are built by talented people, then the way to attract and retain the best is not just about offering a competitive salary. Germans are more likely than employees in other countries to say it’s important to them that they work somewhere that gives them a good time as well as payment at the end of the month. Seek out opportunities to bring more fun into the working environment.

OLD MEDIA IS STILL TODAY’S MEDIA

There’s a strong adoption of new technology, and just over half of all German consumers use a social media platform at least once a day. But don’t invest in the new at the expense of the old, which is still a highly effective way of reaching huge numbers of people. Even now, 47 percent of consumers’ media time is spent with traditional TV, print or other “old” media. This is in contrast to the global split, of around one-third of people’s time with old media, and two-thirds with new.

IT’S ALL IN THE MIND

Everyone wants to look good and feel great, but for many Germans, health and mental wellbeing are stronger motivators than wanting to appear attractive. Products that help people look good could consider emphasizing self-confidence and the effect on mood, rather than how other people react. There is considerable demand for services that help people slow down, de-stress and get enough sleep.

CASH IS LOSING ITS LUSTER

There is a long tradition of making payments with cash to protect personal privacy, and this is still most consumers’ favored way to pay, but card payments are on the up for the obvious reason of convenience. Banks have been reducing fees, which is encouraging more people to apply for cards, though debit cards are still much preferred over credit cards. Cryptocurrency payments are rare, though the German National Tourism Board has started accepting payment for its services in Bitcoin and other cryptocurrencies, and the food delivery company Lieferando has been taking Bitcoin payments for over a year.

SOCIAL MARKETING ISN’T JUST ONE THING

Brands can use social media to inspire, inform and lead consumers to interact (and transact). The key to success is knowing which consumers are using which platform for what. Social video is a great source of inspiration – fashion and home decorating ideas, for instance – and that’s best done on YouTube, while Facebook is better suited to imparting information – upcoming discounts, free delivery and opening hours. The extent of a platform’s reach matters less than matching the right branded content to the platform’s users.

CURATE AND CREATE TRUSTWORTHY CONTENT

Consumers are sceptical about the content they encounter, particularly online. Brands therefore need to ensure that across all touchpoints, they are consistent in presenting an image of their brand that rings true to those who know it, that is relevant to consumers in the moment they are exposed to it, and that enables people to engage, rather than simply receive a message.

GERMANS LIKE TO BUY LOCAL

But it’s not for reasons of national pride. Rather, there’s a sense that locally produced goods are more sustainable, and provide jobs for people who live near them. There’s also an artisan feel about many goods that are made locally, and this is an appealing contrast to mass-produced items that to many people implies quality.
INTRODUCTION

While voice-activated digital assistants have been sweeping the English-speaking world, they’ve been a little slower to gain traction in other markets. In Germany, only around 5 percent of households currently have a smart speaker such as Google Home or Amazon Alexa, so this is a niche market for now, but it is on the way. Among people identified as early tech adopters, penetration is 12 percent. These devices promise to change the way consumers and brands relate; brands need to think about the voice they will have – both the literal voice they speak with, but also the personality they project.

TECHIES DON’T ALWAYS WANT MORE TECH

Don’t assume that the early adopters of new technology necessarily want to adopt all things new and digital. In fact, the most digitally active customers are often the most discerning about the products and services they’re willing to try, and their attention is hardest to grab. So, don’t rely solely on broad demographic stereotypes. Within these target groups, there can be a huge diversity of behavior and attitudes, and even those with the most open minds need convincing.

SPEAK WHEN YOU’RE SPOKEN TO

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REMEMBER TO BE HUMAN

This is a high-tech market, but there’s reluctance to leap into the future with mobile payment and bot-led customer service. Levels of enthusiasm for mobile-only payment and for online-only service models are actually lower than global averages. Technology is both exciting and a little frightening. More than half of Germans worry about getting left behind by the pace of change.

AAAAAND RELAX

Everyone’s now looking for brands to provide them with an experience – not just a great product or service at the right price. But while some consumers want high-energy experiences, or something that provides a feeling of escaping from their daily routine, German consumers prioritize experiences that help them connect with other people, are memorable, and help them relax.
A combination of consumer and business confidence is driving steady growth in media investment in Germany. Digital channels are attracting the lion’s share of investment, and are expanding their share every year. But more traditional channels, particularly television but also radio, cinema and outdoor, are also seeing rising levels of spend.

Total media investment was forecast to rise by 1.3 percent for 2018, consistent with the past two years’ growth, when rates of 1.3 and 1.4 percent were posted. This topline figure takes into account a 5.5 percent rise in investment online, and declines of 3 percent for both newspaper and magazine adspend.

Net advertising spend across all media in Germany in 2018 was expected to total US$20.44 billion, according to GroupM.

Large numbers of German consumers are still using desktops and laptop computers to go online, and in Kantar TNS’s global Connected Life study, Germany emerges as one of the top 10 most PC-centric countries in the world. This is important to bear in mind for brands and agencies developing online content; while in many markets the stress is on making content suitable almost exclusively for the small mobile screen, in Germany, that would be a mistake.

Even those people who are heavy users of mobile internet still tend to connect via a computer as well, which affects the optimal media and content mix required to reach them effectively.

Television is still hugely influential, and accounts for 34 percent of the time people spend using any media. This equates to an average of 3.7 hours’ watching TV each day, compared to just under three hours per day spent online. This explains why a significant proportion of advertiser investment goes in this direction; in 2018, TV took 27 percent of budgets, and was growing at 2 percent a year.

This used to be a market dominated by newspapers. In fact, it was only in 2015 when newspaper ad investment was superseded by TV and online as the primary destination for advertising spend. Newspapers are in decline in Germany as everywhere, but are holding out better here than in most markets.

The average consumer in Germany still spends over an hour a day reading a print publication, and that explains why 21.6 percent of net national adspend goes to newspapers here, and a further 10.5 percent to magazines.

German consumers are less avid users of social media than others in northern and western Europe, spending around 45 minutes a day on social networks, compared to an average for the region of closer to an hour, and a global average of 90 minutes. The most popular networks are Facebook, WhatsApp, YouTube and Facebook Messenger.
1. Consumers’ media habits are migrating online, but traditional media is far from dead. Balance online and offline for the right channel approach.

2. Online video is increasingly popular, but it’s not instead of TV. Think about complementing and boosting the effectiveness of TV ads with online video, and vice versa.

3. Social media use and the proliferation of platforms makes effective targeting more difficult, but data and insight show brands how to prioritize platforms and devices with the right content.

4. Ad blockers are prevalent, but it doesn’t mean no one’s watching online ads; their availability does, however, force brands to make sure their content is genuinely engaging.

**Fast Facts**

- % of internet penetration among those aged 10+: 90%
- % of online display bought programmatically: 50%
- % of online display advertising spent on video: 33%
- 10.6 HOURS
- €818

**% Share of Net Media Spend in Germany**

<table>
<thead>
<tr>
<th>Media Type</th>
<th>2008</th>
<th>2018(f)</th>
</tr>
</thead>
<tbody>
<tr>
<td>TV</td>
<td>23.1%</td>
<td>10.5%</td>
</tr>
<tr>
<td>Radio</td>
<td>4.1%</td>
<td>6.3%</td>
</tr>
<tr>
<td>Newspapers</td>
<td>38.5%</td>
<td>21.6%</td>
</tr>
<tr>
<td>Magazines</td>
<td>15.6%</td>
<td>10.5%</td>
</tr>
<tr>
<td>Cinema</td>
<td>0.4%</td>
<td>4.6%</td>
</tr>
<tr>
<td>Outdoor</td>
<td>4.6%</td>
<td>29.5%</td>
</tr>
<tr>
<td>Digital</td>
<td>13.8%</td>
<td>27.0%</td>
</tr>
</tbody>
</table>

**Internet Use by Individuals**

- Mobiles & Smartphones: 87%
- Laptops: 65%
- Desktop PCs: 62%
- Tablets: 46%
- Other: 16%

Source: Germany State of Digital 2018, GroupM
Source: This Year Next Year, GroupM 2018
Source: Statistisches Bundesamt (Destatis) 2018

BEWARE OF CLICHÉS

The connected world is changing the way brands and consumers relate to each other – but it’s not killing off all the old ways of working.

- Consumers’ media habits are migrating online, but traditional media is far from dead. Balance online and offline for the right channel approach.
- Online video is increasingly popular, but it’s not instead of TV. Think about complementing and boosting the effectiveness of TV ads with online video, and vice versa.
- Social media use and the proliferation of platforms makes effective targeting more difficult, but data and insight show brands how to prioritize platforms and devices with the right content.
- Ad blockers are prevalent, but it doesn’t mean no one’s watching online ads; their availability does, however, force brands to make sure their content is genuinely engaging.
INTRODUCTION

BRAND VALUE

The Top 50 Most Valuable German Brands in 2019 are worth a combined US$340.8 billion, which represents annual growth of 11 percent. The ranking is led by brands that have not just become household names in their home market, but which are global leaders in their categories.

SAP is the most valuable brand in Germany for the second consecutive year, with brand value of US$50.9 billion, up 4 percent in the past 12 months as it further expands its client base around the world. The order of the Top 10 in 2019 is unchanged from 2018, with Deutsche Telekom in second place, followed by BMW, Mercedes-Benz and DHL. Nine of the Top 10 brands increased their value over the year; the only one to decline saw a dip of just 1 percent.

Like the other brands at the top of the German ranking, almost all of these names are powerful global brands. The international nature of their consumer base is partly what’s behind their success over the past year. When demand is soft in some markets, that is offset by stronger demand in others.

The overall 11 percent growth rate in the value of the Top 50 is a solid performance in the current climate. The value of the Top 50 UK brands grew by 5 percent over the same period; leading French brands – largely driven by global names in luxury – rose in value by 22 percent. This compares to growth rates for the leading 100 brands in China and our Global ranking – usually streets ahead of growth in other markets, given that they’re led by the world’s ever-expanding tech giants – were 23 and 21 percent respectively.

Source: BrandZ™ / Kantar Millward Brown

Most Valuable German Brands 2019 – The Top 10

<table>
<thead>
<tr>
<th>#</th>
<th>Brand Value Rank</th>
<th>Brand Name</th>
<th>Brand Value 2019</th>
<th>Brand Contribution Index</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>#1</td>
<td>SAP</td>
<td>US$50,937M</td>
<td>2</td>
</tr>
<tr>
<td>2</td>
<td>#2</td>
<td>Deutsche Telekom</td>
<td>US$41,226M</td>
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<td>#3</td>
<td>BMW</td>
<td>US$25,217M</td>
<td>4</td>
</tr>
<tr>
<td>4</td>
<td>#4</td>
<td>DHL</td>
<td>US$23,410M</td>
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<td>#5</td>
<td>SIEMENS</td>
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<tr>
<td>6</td>
<td>#6</td>
<td>ADELANTADO</td>
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<td>#7</td>
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<td>#8</td>
<td>BOSCH</td>
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<td>5</td>
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<tr>
<td>10</td>
<td>#10</td>
<td>adidas</td>
<td>US$8,819M</td>
<td>4</td>
</tr>
</tbody>
</table>
BrandZ™ valuations are unique because they take into account not just the financial might of a business, and the physical presence of a brand on our screens and in our streets. Our valuations also quantify the role that a brand occupies in consumers’ minds. This “power in the mind” is what we call “brand contribution”, and this enables financially smaller brands to punch above their weight in the Top 50 ranking.

Two brands with similar financial scale can therefore find themselves in quite different positions in the ranking. This is because there is a difference in the proportion of their intangible value that is brand-driven, rather than market-driven. That is, they each have a different “power in the mind” of consumers, and this can propel them up or down the Top 50.

In the German Top 50, the power in the mind is very different for different brands. Deutsche Post, for example, which ranks 19th this year, has a brand contribution score of five out of five. This means a high proportion of its intangible value is driven by the brand, and it supercharges the brand, so it achieves a brand value of almost $3.8 billion.

E.ON, meanwhile, has a brand value only marginally higher, and is in 18th position in the 2019 rankings. But E.ON has a lower brand contribution score – one out of five – because it is more dependent on operational aspects and the presence of its real estate for its prominence in the market, whereas for Deutsche Post, the brand is the biggest source of value.

Brand value is hugely important for both brands, because it isn’t just a way to supercharge a brand’s performance in the BrandZ™ rankings. A high valuation reflects how well a brand differentiates itself from its competitors, generates desire, and cultivates loyalty.

Brand strength also helps insulate a brand against decline when times are tough. In challenging times, strong brands tend to be more resistant to a downturn and, when market conditions pick up, they recover faster than the competition.

Five of the Top 10 brands in the 2019 German ranking have high brand contribution scores, that is a score of four or five out of five.

But many of the other top scorers – those that have the greatest proportion of their value driven by their “power in the mind” are from lower down the ranking. These include Krombacher (50th) and Beck’s (39th) beers, along with Lenzit (44th) and the retailers EDEKA and REWE (26th and 40th respectively) – brands that have made themselves part of consumers’ everyday lives.

Zalando has burst into the German Top 50 this year, with a value of over $3 billion putting it in 21st position. The brand has created for itself a unique point of difference in a crowded e-commerce market. Its focus on the opportunity to return unwanted items for up to 100 days is unheard of in the retail sector, and its “Scream for Happiness” campaign highlighted in a very vocal way the joy of receiving an online order.

Zalando is seen as 46 percent more different than the average brand, and provides an online experience 33 percent better than most brands. It also does great advertising, often in conjunction with online influencers, and these all combine to drive not just volume sales but also to give Zalando the power to command a price premium.
INTRODUCTION

BRAND HEALTH

The most valuable brands, not just in Germany but around the world, are those that stand out from the crowd in a way that makes a positive difference to people’s lives. It’s really that simple, and we call it having Meaningful Difference.

Meaningful Difference doesn’t just get a brand recognized or remembered, it adds to the bottom line. Among the German Top 50 Most Valuable Brands this year, the brands that have a high score on the BrandZ™ Meaningful Difference scale are worth almost three times as much as those with a low score (an average brand value for the high scorers of US$8,630 million, compared to $2,847 million for the low scorers).

So, how can the low scorers become high scorers on Meaningful Difference? Just as there are many contributors to human wellbeing, there are multiple factors that contribute towards a healthy brand. BrandZ™ analysis has identified five key attributes shared by healthy, strong and valuable brands.

Brand Purpose
It starts with having a purpose (making people’s lives better). DHL, Lufthansa and Miele are among the German brands with an especially strong sense of purpose.

Innovation
Brands must be innovative ideally in a way that underlines that purpose, which means they’re seen as leading the way in their sector and shaking things up. NIVEA, Deutsche Telekom and ALDI shine in this area.

Communication
They must also be creative, with powerful, memorable advertising and communications. Think here of EDEKA, Beck’s and Lidl.

Experience
They provide a great brand experience that meets consumers’ needs, and is available when and where consumers need it. Deutsche Post, Sparkasse and REWE are great at providing a memorable brand experience.

Love
Over time, consumers develop a sense of love towards the brand. Consumers feel a strong emotional attachment to brands such as DHL, Lufthansa and ALDI.

When a brand is strong on all five of these attributes (scoring significantly above average), they have healthy “vital signs” and we say they’re healthy brands overall. We combine scores on each of the five elements into a single “Vitality Quotient”, or vQ score.

Germany’s Top 50 brands are, on the whole, looking full of vigor. They have an average vQ score of 109, which makes them stronger than 85 percent of all other German brands. This health premium stacks up well against the most valuable brands in other markets. The average vQ score of leading brands in the Netherlands and Spain is 106; in the UK, it’s 108; in France 110; Italy 111 and the United States 113.

Leaders of the pack
DHL, NIVEA and Lufthansa are all among the Top 10 brands in the ranking on all five aspects of brand health. When you think about what these brands have in common, it becomes possible to feel more intuitively what the BrandZ™ data is telling us.

All three brands operate in highly competitive sectors. Yet in many people’s minds, they stand apart from the rest – and not just because they are long-standing and trusted brands, not because they are home-grown.

Lufthansa is a premium brand in an increasingly price-focused category, but NIVEA and DHL are not; a high price tag is not what makes a brand healthy. What unites these brands starts with their focus on a mission that has led them since they began.

For DHL, that’s about simplifying consumers’ lives, while for Lufthansa, it’s making travel special for individuals. They are all innovative, adapting their offer to changing consumer demands. They communicate their distinctive style and their innovations clearly and consistently – the ‘Excellence. Simply Delivered’ tagline clearly sums up DHL’s mission – lived out in the brand experience.
INTRODUCTION

BRAND HEALTH

SPOTLIGHT ON...

BRAND PURPOSE

REWE’s focus on sustainability is reflected in changes to the products the supermarket chain is offering. It is set to expand its range of sustainable fruit juices by switching to exclusively certified organic orange juice by the end of 2023, becoming the first food retailer in Germany to sell exclusively certified organic orange juices. Certified pineapple juices are already available at REWE. Around 68 percent of the private label juices sold by REWE and its discount sister supermarket Penny are either Rainforest Alliance certified or have been awarded the EU Bio-Label.

INNOVATION

DHL is working with Ford to manufacture electric delivery vans called StreetScooters. Its Deliver Future pilot project is also revolutionizing the delivery of medicines to remote areas using drones; trials have seen the autonomous DHL Parcelcopter 4.0 complete a 60km flight. The brand is also investigating the potential for driverless trucks in some markets.

COMMUNICATION

The car rental category is one that most people aren’t interested in until they need it, and then they compare largely on price. Sixt is using its communications to get beyond that, and is known for consistently using cheeky, timely ads to show the value of its services. When a German government minister took her office car on a trip to Spain and had it stolen, Sixt billboards shouted “There’s Sixt in Alicante! From €29 per day including theft insurance.”

EXPERIENCE

The L&T shopping mall in Osnabrück is going all out to give shoppers a memorable experience, with a surf wave pool now installed in the basement and a high-tech gym and open-air cinema also in the works. Not all great brand experiences need to be quite so headline-grabbing, though. Lufthansa’s FlyNet WiFi in the air, and its focus on safety and a pleasant journey, help it rank among the best German brands for experience.

LOVE

Banking isn’t usually a category that gets a lot of love, but Sparkasse is one of the most-loved brands in the country, thanks to its mission to make banking simple – through new digital products – and its focus on the personal touch. Sparkassen around the country are independently managed, so can focus on the needs of their local customers. Their 2018 campaign “Gemeinsam allem gewachsen” (Together we can do anything”) neatly sums this up.
INTRODUCTION

A year of significant ups and downs for individual brands in the German Top 50 has done little to alter the overall composition of the ranking. This underlines the growth that is possible for brands even in slow-growing categories. In essence, while a rising market can benefit a whole sector, the strongest brands year in and year out make their own growth.

The largest contributor of value to the German Top 50 is, as was the case in the 2018 ranking, cars. Around a fifth of the value of the entire ranking – nearly $70 billion in value – comes from just five brands: BMW, Mercedes-Benz, Audi, Volkswagen and Porsche.

Reflecting strong consumer confidence in Germany, retailers ALDI, Lidl, REWE, Kaufland and EDEKA enjoyed brand value growth, in some cases approaching 10 percent.

BRANDS ON THE MOVE

The car category grew by 5.4 percent this year, with the vast majority of that extra value coming from VW; the brand was still suffering last year from the public backlash over “Dieselgate”. This year, it has bounced back with vigor, and is by far the ranking’s fastest-growing brand, with brand value 66 percent higher than 12 months ago. The value of the other car brands, in comparison, was static. If we expand this category to include broader automotive-related products and services, then brand value growth for the year would be 18.5 percent, supercharged by the inclusion this year of Continental tires and Sixt car rental.

Technology is the next-biggest contributor of value to the ranking, a sector represented by just two giant brands: SAP and Siemens.

Telecommunications providers account for 14 percent of the Top 50’s value this year and this is another sector to experience value growth compared to 2018, thanks in part to the entry of Unitymedia to the ranking, in 23rd position.

Sporting performance
Retail and the closely linked apparel sector were both fine performers this year. Both adidas and Puma saw strong double-digit growth (16 and 37 percent respectively) putting them among the fastest-growing brands in the Top 50 this year. Hugo Boss saw a 7 percent lift.

E-commerce specialist Zalando joined the Top 50 for the first time, in 21st place, giving the retail sector a strong value boost to complement the growth that most of the existing brands in the category enjoyed. dm (in 32nd place) also added value to the category this year.

Reflecting strong consumer confidence in Germany, retailers ALDI, Lidl, REWE, Kaufland and EDEKA enjoyed brand value growth, in some cases approaching 10 percent.

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INTRODUCTION

LOVE AND EMOTIONAL CONNECTIONS

The most valuable German brands are especially strong on providing a great experience, having a clear purpose, and are widely seen as being innovative. But what they tend to lack is love.

Brands might be tempted to think that this doesn’t really matter. Who needs love if they’re regularly coming up with innovative ideas, and making great advertising to promote them? Well, love is worth a lot to a brand – it’s much more than a “nice to have.”

Our research shows that when consumers make decisions about what to do or buy, their brains work in two ways. The first happens almost without any thinking at all. It’s an instinctive response made in a fraction of a second – what’s become known as System 1.

The second way, System 2, is more like thinking in the traditional sense. It’s when someone weighs up the pros and cons of one brand choice versus another and comes to a reasoned decision. Compared to System 1, this is time consuming and taxing.

This is why the brain uses System 1 – the fast, easy approach to decision-making – wherever possible, to help it make sense of a fast-moving world with as little mental effort as possible.

And here’s where love comes in. In essence, people feel first and think second, so when people feel emotional affinity towards a brand, it can lead to that brand becoming the one they reach for without really thinking. It becomes their System 1 choice, and that’s clearly a major competitive advantage.

So, where did the love go for Germany’s brands?

The Top 50 German brands are a poor performers compared to the leading brands from many other large economies.

Worse news still is that German brands are less loved now than they were just a year ago. The love scores of the Top 50 brands has declined 4 percent since 2018, and for the Top 10 has dropped by 7 percent.

When BrandZ™ researchers ask consumers about the personality attributes they associate with leading German brands, we start to see why there’s a respect and even admiration for them – but often a distinct lack of love.

Many of the largest German brands have established a strong reputation for success by providing world-leading, innovative products supporting customer choice and the desire for quality. But for some, this focus on all the rational reasons why someone would choose their brand has come at a price: they’ve forgotten about the emotional connection, and as a result people feel they’re lacking warmth and approachability.

The Top 25 brands in the German ranking over-index on traits such as being in control, arrogant and assertive. They also under-index on some of the more attractive personality attributes, such as being kind, brave, playful and fun.

This is not to say that there aren’t lovable and loved brands in Germany; there are. It’s just that smaller brands – and some of the big international brand names – are doing a better job of getting consumers to fall in love. In fact, among the most-loved brands in Germany, none of the Top 5 features in the BrandZ™ Top 50 Most Valuable German Brands.

The most loved brands in Germany outside the BrandZ™ Top 50

The average score of all brands is 100.
German brands wanting to bring back the love need to look at all of the contacts that consumers have with them. This includes physical experiences in a store or when using a product, along with brand communications, items in the news, and word of mouth. It also brings in packaging, logos and sounds associated with a brand.

At every one of these touchpoints, brands need to deliver not just reasons for making a sensible, System 2 choice, but also positive, emotional associations that embed themselves in consumers’ minds. In this way, they may gradually become the automatic, System 1 brand of choice.

This is a large, long-term task, and there’s no shortcut to building the kind of strong emotional connections that lead to true brand love.

But there are several areas from where brands lacking love can make a start. Here are two:

1. **Trust**
   The brands that tend to perform poorly on the BrandZ™ love measure also tend to be less trusted when consumers are asked about their reputation. Trust levels for the Top 25 brands in our 2019 ranking are significantly lower than the average brand, while brands 26 to 50 have a trust score that’s much higher than average.

   It’s not quite as simple as saying that building trust will definitely lead to love, but love requires an underlying emotional connection with consumers, and few brands can generate that without also building trust.

2. **Emotion-Driven Advertising**
   Ads are an opportunity to etch a brand’s name on the mind of a consumer, but they’re also much more than that. If an ad also creates strong, positive emotional connections, then it is not just recalled, but remembered fondly. And it’s this warmth of feeling that helps lead to love. Germany’s Top 50 brands are less renowned for great advertising than some of the leading brands from other markets. In fact, among the Top 10 brands in Germany for advertising, only three feature in the most valuable Top 50. BrandZ™ research around the world shows that when big brands have engaging communications, they also generate love.
Let’s Creativate!
Why creativity is the source of future business prosperity

How Do We Win Over Gen Z?
The target audience of tomorrow, today, and now

It’s About The Makers
Recapturing the courage of youth to manage change

How Do You Transform Disruptors?
Adaptive marketing for business success

In The Driving Seat
The value of high-octane marketing

The Reinvention of Customer Care
Rethinking KPIs for long-term satisfaction
What really distinguishes highly successful companies from their competitors? What do they do differently? What do the American “GAFA” companies (Google, Amazon, Facebook and Apple) and the Chinese “BAT” companies (Baidu, Alibaba, Tencent) have in common? Why do they leave their European competitors behind?

There are many examples of “creativity” boosting people, teams, governments and companies – we just need so many more of them.

We used these learnings to show that in times of ever-faster globalization and digitalization, it’s essential that ideas can be formed in any possible context and by everyone involved.

How do we do that?
First, adapt to the principles of new work. Old-fashioned, hierarchic workplaces won’t allow any company to be successful in the changing economic world.

Second, invest in infrastructure that enables creativity. That means technological infrastructure as well as office spaces: shared workplaces and meeting points, with single-person cubicles consigned to history.

Third, find, promote and celebrate creative potential! Open up, and involve everybody in the process of developing solutions; of being creative. Have everybody using their creative potential, have the whole organization be creative – choose total creativity over siloed creativity.

This process of tearing down the silos, adapting to total creativity, is what we call “creativation”.

Speaking of creativity, we’re not talking about the arts, or award-winning advertising. We are talking about “total creativity”. About how GAFA and BAT companies work. Constantly changing and challenging themselves. Surprising and amazing their customers with constant innovations. Who could have predicted that Amazon would grow from an online bookstore to a company that sells anything, anywhere, any time? Kindle, Prime, Marketplace, Alexa. And in three years’ time they’ll probably be bringing our beer with a drone.

Let’s creativate!
Many more of those inspiring examples – far beyond the GAFA and BAT stories – feature in our recently published book: “Kreativert Euch!” or in English, “Let’s Creativetate!”. We spoke to entrepreneurs and marketing professionals. And we, the marketing people, are the ones who need to spread the news: creativity is key. For all our futures.

Who should be doing it?
This is our call to companies, politicians and educators. We advise companies to appoint a Chief Creativation Officer. Someone who makes sure that the three steps to total creativity above are observed: there is a creative culture and the right infrastructure, and the business finds, promotes and celebrates creative potential throughout the company. This will boost both the acceptance of total creativity and economic success alike.

But our call doesn’t stop there. It goes far beyond individual companies and even whole sectors of the economy. We’re calling on society to make a creative u-turn.

We’re calling for a Federal Ministry of Creativation. The truth is, politicians need to understand that creativity will be the main source of economic success in the years to come. A Federal Ministry of Creativation would send an extraordinarily strong signal to society.

And, as it always comes down to the next generation, we’re challenging the education system. We call for creativation in schools and in university classes, as creativation starts with education.

Creativation starts with education. In schools and in university classes, as well as small and medium-sized businesses around Germany and Switzerland, including HHP, Umanits and elobau. We met Nicolas Sadracis from the computer science university “42” in Paris, and teachers from a comprehensive school in the small town of Weierheide. We talked to Professor Arne Dietrich about neuroscience and creativity, looked into the administration of the Danish City of Kolding, and Christian Banson, a consultant to the Danish Government. We examined BMW’s “project i”, and the new Axel Springer campus in Berlin.

Finally, we’re displaying our strong belief that creativation will lead to a more human, more open-minded society. Those who are truly creative don’t believe in the past but believe in freedom.

Let’s creativate! It’s our future.
Many traditional companies have lost track of their customers. Products and communications are developed in the ivory towers of brand management and agencies. The only time companies really listen to their target audience is in the labs of market research companies, when they watch consumers test products and ads from behind glass walls.

Another factor complicating true customer centricity: Marketing is often targeted at a defined audience, and one that is, to put it plainly, wrong. Nearly two-thirds of Generation Z already influence the purchase decisions of their families. Gen Z is not only the target group of tomorrow – it’s the target group of today.

The youngest generation currently comprises a quarter of the world’s population; in just a few years it will make up 40 percent of all consumers worldwide. Gen Z are equipped with high monthly budgets and have stronger purchasing power than any young generation before them. Being social media pros, they act as multipliers amongst their peer groups. Thanks to their aptitude for technology and social media, Gen Z use these tools without hesitation, thus unleashing a high degree of inventive energy and productivity. They don’t just consume content, they want to develop and create it too.

Brands, however, have a hard time finding a place in the world of today’s teens. These people are nearly impossible to reach through classic advertising channels and spend more than 3.5 hours a day online, usually on their smartphones. More than half of them dislike brands that try too hard to be “cool” and are tired of brands using stereotypes to address them. The result: Gen Z rejects advertising, especially if it doesn’t communicate with them at eye level.

So, how can brands interact with this most skeptical of all target groups to trigger positive reactions and create business results?

1. Experience, not branding
Gen Z demands a lot from companies. Brands in the traditional sense have lost significance for them. It’s not about the logo, it’s about the personal benefits. Companies that can’t deliver value or amazing experiences will quickly be forgotten. Being true digital natives, Gen Z are used to direct dialogue and expect to be heard and respected.

Digital players such as Airbnb, Netflix and Spotify have shown how an ambitious vision coupled with relevant benefits, ease of use and customer-centric services builds strong brands. Traditional businesses can learn an important lesson from these digital rock stars: the clearer your vision, the better it can be conveyed through a range of touchpoints. Combine this vision with a relevant value exchange and consistent storytelling, and you’ll create experiences that generate real impact.

2. Sound is the new logo
The rise of services like Amazon Echo and Google Home opens up a new playing field for brands. In the near future we won’t see brands anymore, we’ll interact with them through spoken commands. The sound of a brand will become an integral part of the experience they offer, and only those brands with an unmistakable sound – a sound character – will be able to cut through the noisy offers on Amazon or Google.

This is especially relevant when communicating with Gen Z. For them, the keyboard is “so 2017”. More than 200 million voice messages are sent on WhatsApp every day, a large proportion of them sent by the younger generation. Music and sound are much-loved tools for self-expression, represented by apps like TikTok or YouTube. Businesses need to respond to this trend – and quickly. Only by doing this can they prevent the future of their brands being shaped by algorithms.

3. Always stay in beta
The majority of companies understand that customer centricity must be at the core of their business. Nevertheless, nearly two-thirds of German companies are still not actively listening to their consumers. Brands like Facebook and Snapchat already have it the “beta mindset”. These companies experiment instead of finalizing; they keep developing new approaches and have them continuously tested and validated by their customers.

The beta mindset goes beyond product development. Digital advertising offers endless opportunities to test and further develop communication in direct interaction with the target group. Classic campaigns will soon be a thing of the past. Instead, brands will foster a continuous and ever-evolving exchange with their audience.

All’s not lost
Is Generation Z the lost generation for advertising? Not at all. While traditional advertising may be dead, communication lives on. Brands, however, need a much stronger understanding of the youngest target group. They need to meet them where they are, and hand over some of their power when defining their brand and creating communications. That’s how today’s teens will become real influencers. And how the customers of tomorrow will become customers of today.
Nanotec, biotec, fintec, AI, blockchain, etc. The only true constant is change. We’ve always experienced change, but today change moves at a searing pace. The ability to quickly adapt and adjust to different environments is what distinguishes us as human beings. Above all, however, stands our capability to foresee the future. The ability to make increasingly precise predictions based on experience and the given information.

Change itself is not the biggest challenge today. It’s the rapid speed and the frequency with which changes occur.

Our thinking and our actions take place in a linear world; in the predictable, the cause and effect. Our reality, however, is changing exponentially. New platforms and technologies arise daily, changing how we interact, changing our aspirations and needs at a speed we can no longer grasp. Hence, we – whose greatest strength is adaptation and future planning – run the risk of being superseded. What keeps us awake night is the fear of losing control.

The further we look into the future, the more unlikely, unstable and irrelevant our forecasts become. In a world that is developing exponentially and rapidly, one of our unique selling propositions as a human being is almost completely losing its significance.

How should we deal with this? What could inspire us to think and act anew? Where should we move to in a world that is becoming less and less planable, and follows our plans less and less? Is it perhaps a matter of doing much more in the future, instead of wasting time with prognoses, planning and most of all concerns about eventualities, which ultimately don’t stand up to the exponential changing reality? Might courage be the answer? The courage to overcome our fears and embrace change and the new, and to evolve in the intensive and active debate? Is it about the readiness to invest our strength in confrontation with the new, instead of walking on well-trodden paths?

Actually, we have to become like children again. Yes, they observe. Yes, they develop strategies. Yes, with increasing age they – fortunately – think more and more. They experience, learn and therefore grow without any fear of the unknown. But above all they do. They simply do.

It is this unbiased willingness to playfully deal with the new and to learn through experience that we lose as we grow up. It is the driving curiosity, which we train ourselves off by an excess of consideration, successful prognoses and consideration of possible dangers. It is about regaining the courage to pursue our convictions. The courage that carries us forward, even in the event of failure. Because you learn to walk when you walk.

This is not about following every possible trend. Of course, the value contribution to our business and our objectives comes first. But we will only recognize this value if we give the new space in our planning and in our strategies. Space for experience, space for development, space for improvement, space for success.

Let us waste less time on talking and instead wipe away our fears, and understand change and innovation as part of a new reality that we can help shape. There is a growing range of technical possibilities through which we can explore our creativity. The question in the end is: Are we ready for it? Let’s shape our future together, instead of just managing what already exists.

Will we be able to do that? We will only find out if we do. Fortune favors the brave.

“It’s about the makers. Recapturing the courage of youth to manage change.”

“Let’s shape our future together, instead of just managing what already exists.”

JAN PETER REINEKE
Chief Digital Officer
Wavemaker
Jan-Peter.Reineke@wmglobal.com

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Will we be able to do that? We will only find out if we do. Fortune favors the brave.
2. Activate cross-media and consumer-centric insights

For agencies, the aim is to capture signals and triggers sent out by consumers, quickly and as completely as possible, and then to respond with relevant messages across all channels. We need experts who have knowledge about data, algorithms and ad technologies, who develop strategies from the insights gained. New organizational structures must ensure that real-time campaign control takes place directly and in interaction with all media. It is important to accompany clients along this journey, helping set up their “data blueprint”, enabling them to control and assess their communications.

But a word of caution: With the possibility of real-time digital measurement, the greatest danger lies in limiting data and results-based media planning to insights from the digital world. Brand growth requires the maximum exploitation of buyer potential over the long term, including more traditional media. Brands must have visibility in order to be successful. An effect-based optimization of even classical channels is crucial for the optimization of advertising budgets.

Conclusion: Even in traditional channels, it’s essential to urgently shift thinking from performance indicators to outcomes.

3. Create brand relevance with increasing ad “blindness”

The goal of effective brand management has always been to link brands and people more closely. To achieve this, brands must be relevant to consumers and offer added value. According to a UN study, 85 percent of consumers expect brands to make an active contribution to improving their lives. Dove, for example, communicates its mission very clearly: a new understanding of beauty and self-confidence. BrandZ™ research has quantified the impact of such a clear purpose on brand growth. Brands that manage to improve people’s lives in real or perceived ways benefit from triple the brand value growth of other brands. The greatest change in digital disruption is, therefore, not the exponential speed of technological progress, but its consequence – the cultural change that affects all aspects of life, all over the world.

Permanent, successful adaptation is the key to future success. Within media agencies, a completely new area has been developed to meet these requirements. This evolution is logical, as it relies on the fundamental competencies and resources of their business model: Data intelligence, contact management and a deep understanding of consumers. In addition, there must be an understanding of how communication works and how brands are built.

Mastering today’s and tomorrow’s communication challenges is more complex than ever before. It’s in the hands of clients and media agencies to build new trust and strong partnerships. In this way, the great potential for future-oriented, innovative market development can be developed jointly for all clients, from blue chips to medium-sized companies to disruptors.
Marketing and media planners today are in a better position than they were only a few years ago. If data is “the new oil”, then marketing ROI is surely one of the engines that need a high-octane version refined from this raw material. Data can be mined from a range of sources, including a brand’s own collection (CRM, transactions, customer behavior), and third-party sources (social media, data management platforms and customer data platforms).

It is often a bumpy ride. But marketers must be in the driving seat and keep their vehicle on track. Budgets must be optimized across more and more individual touchpoints and channels – paid, owned and earned. They need to balance strategic brand-building investments with short-term activation and promotional efforts. In real time, with their hands on the steering wheel (that is, the keyboard).

When it comes to budget and media optimization, many brands turn to media mix models. Traditional media mix models are based on sales and marketing spend time-series data. Since CFOs typically want to understand what drives sales, they seek to understand its key components: (1) seasonality, (2) sales that are influenced by their own and competitors’ marketing activity, and (3) the so-called “base sales”, i.e. the base revenue level independent of short-term marketing activity.

While traditional media mix models may do a good job of optimizing “incremental sales”, we often see them fail to explain the long-term effects of brand building. Consequently, more than one brand has led itself down a dead-end path of “activation and promotion-only” advertising, ultimately damaging brand equity and negatively influencing sales.

But marketers’ hands need to stay close to the controls while driving high-efficiency marketing – just like a Formula 1 driver’s hands need to stay on the steering wheel: Optimization of marketing ROI is not a one-off action, and needs to be adapted to changes encountered along the way.

Marketing activities evolve, customers change, and new data keeps pouring in. Luckily, today there is something comparable to driver assistance systems: Artificial Intelligence. We can use the latest machine learning tools to derive auto-optimization models that keep up to date with data streams as marketing activities evolve.

And, of course, the driver needs a dashboard on which to gather information and influence the machine: an intuitive optimization and simulation cockpit is essential for the high-octane marketer.

What’s the prize for successful high-octane brand marketers? An average improvement of marketing effectiveness of between 20 and 30 percent in the first year. Holistic marketing mix models have passed the test-drive phase, not only in the automotive industry, but also in packaged goods, logistics and other sectors. The average ROI of second-generation marketing mix models is disproportionally higher than that of simplistic approaches that merely take account of short-term media effects.

Let’s drive!
THE REINVENTION OF CUSTOMER CARE

Rethinking KPIs for Long-Term Satisfaction

Too many companies still approach customer relationship management (CRM) with a self-centric perspective, and see customer care as a cost center rather than the backbone of customer relationships.

Here are eight ways we should use customer care as a valuable business driver to create deep customer relationships.

1. The long-term value of customers is underestimated
   As soon as the salesforce tag switches from “prospect” to “new customer”, the treatment switches from “Prince Charming” to “McKinsey”. That is why customer requests end up at an external call center far from the core of a company. In those times of “everything as a service”, we experience a renaissance of deep customer relationships as the prerequisite for economic success. Why? Because today, customers can decide on a daily basis whether to stay with you or leave. Marketing budgets need to be reallocated towards deep customer relationship programs. Within this context, customer care will be finally seen as what it actually is: a value center.

2. In-sourcing customer care – competitive advantage
   There is that German saying, “every piece of feedback is a gift”. Digital companies do not believe in five-year plans. They continuously improve their products and services in so-called “sprints”. Continuous customer feedback is mandatory for this agile way of offering continuous improvements. And customer feedback is there for free; you only have to listen. Customer care means getting feedback on your products and services. Customer care needs to be an integral part of product and service-development teams.

3. The slow death of self-service
   In recent decades, self-service options for customers have been a popular way to reduce operational costs and, initially, customers were fascinated by the new transparency, speed, accessibility and that feeling of autonomy. Today, however, self-service creates frustration. Leave the dialogue with your customers to automated systems and your customers will leave you. AI-based systems might make a difference in the future, but don’t even think of letting today’s AI-based systems be trained by your customers. We are experiencing a new interpretation of “the customer is king” – could you ever imagine a king trying to deal with a self-service system?

4. Customer is king – here comes their entourage
   Even though debates about personal data still rage, digital assistants are becoming increasingly popular in Germany. As a consequence, companies will experience a decrease in direct dialogue with their customers – to be replaced by an increasing relationship with customers’ digital assistants. Customers send their “digital entourage” to browse and shop for them, turning B2C business into B2E business (“Business-to-Entourage”), and customer care into entourage care.

5. CLV – the ultimate KPI for business success
   We can only improve what we can measure. Maybe this quote is the reason why we still connect business success with marketing KPIs like the number of new customers, or the costs per customer acquisition, but not the increase in customer lifetime value (CLV). Many companies talk about it, but only few actually apply CLV. CLV means the sum of future benefits the company can expect from a customer relationship, which allows them to vary customer care based on the CLV of a customer – from an efficient AI-based approach to cost-worthy personal assistance.

6. Customer care becomes omnipresent
   Technology enables customer dialogues at all touchpoints that customers have with brands. In the near future, Siri will help me with my iPhone, I will have my car explain how I should use it, and websites will guide me with a screen-sharing AI assistant. Technology enables customer dialogues at all touchpoints that customers have with brands. In the near future, Siri will help me with my iPhone, I will have my car explain how I should use it, and websites will guide me with a screen-sharing AI assistant. Technology enables customer dialogues at all touchpoints that customers have with brands. In the near future, Siri will help me with my iPhone, I will have my car explain how I should use it, and websites will guide me with a screen-sharing AI assistant. Technology enables customer dialogues at all touchpoints that customers have with brands. In the near future, Siri will help me with my iPhone, I will have my car explain how I should use it, and websites will guide me with a screen-sharing AI assistant.

7. Customer care is “sales as a service”
   Customer care will dissolve into all organizational units having the potential to orchestrate all digital touchpoints with customers - including the ones marketing used to own. Customer care could holistically design and manage deep customer relationships and be a wise, seamlessly communicating assisting partner to the customer. Companies investing in deep customer relationships are creating a long-term competitive advantage hard to compete with.

8. The rise of “white pattern” business
   With the Nobel Prize winners in Economic Sciences, Daniel Kahneman and Richard H. Thaler we saw a rise in data-driven behavioral economics - unfortunately most often applied to so-called “dark patterns”, which makes customers act to the benefit. Or should I say, “short-term benefit”, as those customers will try to leave or trick back in the long term. For deep customer relationships, we need the opposite - “white patterns” - in which the customer experiences a “retainer” of benefits, trust and value, making them a loyal, long-term customer.

These eight points are all part of one big paradigm shift across industries, from transaction-oriented to relationship-oriented business models, in which the depth of a customer relationship is the ultimate key performance indicator for long-term business success. Customer care could play a leading role in this.
BRANDZ™ TOP 50 MOST VALUABLE GERMAN BRANDS 2019

1. Technology
   - SAP
     - Brand Value 2019: $50,937M (Brand Contribution Index 2)

2. Telecom Providers
   - Deutsche Telekom
     - Brand Value 2019: $61,226M (Brand Contribution Index 3)

3. Cars
   - BMW
     - Brand Value 2019: $25,217M (Brand Contribution Index 4)

4. Cars
   - Mercedes-Benz
     - Brand Value 2019: $23,410M (Brand Contribution Index 4)

5. Logistics
   - DHL
     - Brand Value 2019: $18,509M (Brand Contribution Index 4)

6. Conglomerate
   - Siemens
     - Brand Value 2019: $15,351M (Brand Contribution Index 3)

7. Retail
   - Aldi
     - Brand Value 2019: $14,613M (Brand Contribution Index 2)

8. Apparel
   - Adidas
     - Brand Value 2019: $13,765M (Brand Contribution Index 3)

9. Conglomerate
   - Bosch
     - Brand Value 2019: $10,479M (Brand Contribution Index 3)

10. Cars
    - Volkswagen
      - Brand Value 2019: $8,523M (Brand Contribution Index 4)

11. Retail
    - Allianz
      - Brand Value 2019: $8,830M (Brand Contribution Index 3)

12. Insurance
    - Continental
      - Brand Value 2019: $8,019M (Brand Contribution Index 3)

13. Personal Care
    - Nestlé
      - Brand Value 2019: $7,754M (Brand Contribution Index 3)

14. Cars
    - BMW
      - Brand Value 2019: $6,879M (Brand Contribution Index 3)

15. Cars
    - Porsche
      - Brand Value 2019: $5,868M (Brand Contribution Index 4)

16. Food & Dairy
    - Unilever
      - Brand Value 2019: $4,668M (Brand Contribution Index 3)

17. Energy
    - RWE
      - Brand Value 2019: $3,970M (Brand Contribution Index 3)

18. Logistics
    - Deutsche Post
      - Brand Value 2019: $3,786M (Brand Contribution Index 3)

19. Banks
    - Sparkasse
      - Brand Value 2019: $3,505M (Brand Contribution Index 2)

20. Airlines
    - Lufthansa
      - Brand Value 2019: $3,255M (Brand Contribution Index 2)

21. Retail
    - Zalando
      - Brand Value 2019: $3,079M (Brand Contribution Index 3)

22. Banks
    - dpd
      - Brand Value 2019: $2,269M (Brand Contribution Index 3)

23. Telecom Providers
    - T-Mobile
      - Brand Value 2019: $2,993M (Brand Contribution Index 3)

24. Energy
    - EnBW
      - Brand Value 2019: $2,809M (Brand Contribution Index 3)

25. Telecom Providers
    - 1&1
      - Brand Value 2019: $2,714M (Brand Contribution Index 3)

26. Retail
    - Miele
      - Brand Value 2019: $2,534M (Brand Contribution Index 4)

27. Home Appliances
    - DB Schenker
      - Brand Value 2019: $2,398M (Brand Contribution Index 4)

28. Logistics
    - DHL
      - Brand Value 2019: $2,269M (Brand Contribution Index 3)

29. Logistics
    - DHL
      - Brand Value 2019: $2,255M (Brand Contribution Index 2)

30. Airlines
    - Lufthansa
      - Brand Value 2019: $2,152M (Brand Contribution Index 3)

31. Apparel
    - Zalando
      - Brand Value 2019: $2,152M (Brand Contribution Index 3)

32. Retail
    - dm
      - Brand Value 2019: $1,879M (Brand Contribution Index 3)

33. Personal Care
    - Schwarzkopf
      - Brand Value 2019: $1,803M (Brand Contribution Index 2)

34. Apparel
    - Persil
      - Brand Value 2019: $1,868M (Brand Contribution Index 4)

35. Home Care
    - Rossmann
      - Brand Value 2019: $1,772M (Brand Contribution Index 2)

36. Retail
    - TUI
      - Brand Value 2019: $1,643M (Brand Contribution Index 3)

37. Energy
    - RWE
      - Brand Value 2019: $1,596M (Brand Contribution Index 5)

38. Travel Agencies
    - TUI
      - Brand Value 2019: $1,449M (Brand Contribution Index 4)

39. Beer
    - ReWE
      - Brand Value 2019: $976M (Brand Contribution Index 5)

40. Retail
    - AIDA
      - Brand Value 2019: $981M (Brand Contribution Index 3)

41. Retail
    - Otto
      - Brand Value 2019: $976M (Brand Contribution Index 5)

42. Car Rental
    - Sixt
      - Brand Value 2019: $1,414M (Brand Contribution Index 3)

43. Food & Dairy
    - Lenor
      - Brand Value 2019: $1,411M (Brand Contribution Index 3)

44. Home Care
    - Metro
      - Brand Value 2019: $1,414M (Brand Contribution Index 3)

45. Retail
    - Metro
      - Brand Value 2019: $1,323M (Brand Contribution Index 3)

46. Banks
    - Commerzbank
      - Brand Value 2019: $1,240M (Brand Contribution Index 1)

47. Travel Agencies
    - TUI
      - Brand Value 2019: $1,195M (Brand Contribution Index 2)

48. Retail
    - AIDA
      - Brand Value 2019: $1,106M (Brand Contribution Index 2)

49. Banks
    - Sparkasse
      - Brand Value 2019: $976M (Brand Contribution Index 5)

50. Beer
    - Kronenbourg
      - Brand Value 2019: $976M (Brand Contribution Index 5)

Source: BrandZ™ / Kantar Millward Brown (including data from Bloomberg)
Brand Contribution Index = Brand contribution measures the influence of brand alone on earnings, on a 1-to-5 scale, 5 being highest.
<table>
<thead>
<tr>
<th>Rank</th>
<th>Company</th>
<th>Brand Value</th>
<th>Change since 2018</th>
<th>Headquarter City</th>
<th>Category</th>
<th>Year Formed</th>
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<tr>
<td>1</td>
<td>SAP SE</td>
<td>$50,937 Million</td>
<td>4%</td>
<td>Walldorf</td>
<td>Technology</td>
<td>1972</td>
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<td>2</td>
<td>Deutsche Telekom AG</td>
<td>$41,226 Million</td>
<td>5%</td>
<td>Bonn</td>
<td>Telecom Providers</td>
<td>1995</td>
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<td>3</td>
<td>Bayerische Motoren Werke AG</td>
<td>$25,217 Million</td>
<td>2%</td>
<td>Munich</td>
<td>Cars</td>
<td>1916</td>
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<td>4</td>
<td>Daimler AG</td>
<td>$23,410 Million</td>
<td>-1%</td>
<td>Stuttgart</td>
<td>Cars</td>
<td>1883</td>
</tr>
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SAP is a software developer specializing in enterprise services for small, medium and large businesses across a broad spectrum of industries. Founded by five ex-IBM employees in the 1970s, it now counts 91 percent of Forbes Global 2000 companies among its customers, and has 413,000 clients in over 180 countries. The client base has expanded by 78,000 in the past year alone. The business made its biggest acquisition in more than three years when it bought Callidus Software Inc. for around $2.4 billion, accessing new sales analytics and customer engagement tools to help expand its cloud-based services. In November 2018, SAP announced the $8 billion acquisition of survey software business Qualtrics. The brand has long associations with sports sponsorship, including Formula 1, horse riding and football, and has had individual athletes, including Ernie Els, as brand ambassadors. In 2018, SAP launched a new advertising campaign with the actor Clive Owen, “SAP helps the best-run businesses make the world run better”, highlighting major global challenges that businesses can help solve. The ads say: “because solving big problems is what business does best”.

Deutsche Telekom is Germany’s telecommunications market leader, providing fixed-line phone connections, broadband, mobile and IPTV services for households and ICT solutions for business and corporate customers. It is regarded as a quality brand that represents value for money, though it is not usually the cheapest option. Deutsche Telekom positions itself as an innovator in the telecommunications sector, and has recently launched a new product called MagentaTV, which combines live TV with streaming services such as Netflix and media libraries from the largest TV stations. The launch marks another move by Deutsche Telekom into the entertainment sector. The name reflects the brand’s use of the color magenta in its communications. Deutsche Telekom is among the biggest spenders on advertising in Germany, and its current campaign focuses on the quality of service available to customers. Deutsche Telekom is present in more than 50 countries, and has 168 million mobile customers, 28 million fixed-network lines, and 19 million broadband lines.

BMW is one of Germany’s best-known premium carmakers, renowned for combining design and technology for “Sheer driving pleasure”, or “Friede am Fahren”. BMW’s range of passenger cars runs from the compact BMW 1 Series through to family-sized saloons and the X Series SUVs, as well as the sporty M and Z4 models, and a growing range of electric cars, sold under the BMW i banner. BMW is sold around the world, through glamorous flagship stores and more traditional dealerships. The brand’s focus is on the experience of the driver sets it apart from other high-end automotive names, while many other marques in this category are seen as serious. BMW positions itself as offering premium quality alongside a fun experience. The distinctive roar of a BMW engine is just one example of this in action. As BMW positions itself for a new future of mobility, it has launched the ACES strategy, focusing on Autonomous Driving, Connected Mobility, Electric Driving and Shared Services.
DHL is a letter and parcel logistics brand whose distinctive yellow vans deliver across more than 220 countries and territories. The brand positions itself as “The Logistics Company for the World”, which is about both global coverage but also about simplifying customers’ lives and making a positive difference to the world. DHL is an innovator, and is – with Ford – manufacturing electric delivery vans called StreetScooters. DHL’s Deliver Future pilot project is also revolutionizing the delivery of medicines to remote areas using drones; trials have seen the autonomous DHL Parcelcopter 4.0 complete a 60km flight to an island in Lake Victoria. DHL’s tagline is “Excellence. Simply Delivered.” The brand is a partner and sponsor of a range of sporting and cultural properties that reflect similar values, including the e-sports specialist ESL One, Formula 1 motor racing, FC Bayern München and Manchester United, and multiple Fashion Weeks. DHL is behind a podcast series “Drive: Stories of Entrepreneurship”, presenting insights into the fashion business through the eyes of entrepreneurs.

ALDI is one of the world’s original discount supermarkets and has been a leader in taking the concept beyond Germany to the rest of the world. While consumers know the brand simply as ALDI, the business is divided into ALDI Nord and ALDI Süd, run separately but each offering everyday essentials at low prices. There are more than 10,000 ALDI stores around the world. In the past year, ALDI has launched a mission to combat wasteful packaging. It aims to reduce by 30 percent the packaging used for private label products by 2025, and ensure all private label packaging is recyclable by 2022. ALDI has also launched its own animal welfare brand, “Fair & Gut”, offering selected fresh meat products that have been produced according to strict rules on animal husbandry. ALDI Süd in 2018 launched an advertising campaign aimed at potential employees, with the tagline “For me. For us. For tomorrow.”

Siemens is a global conglomerate that has grown over 170 years into the largest manufacturing company in Europe. Consumers know it best for its range of high-end home appliances and electronics, but Siemens also works in the lighting, medical, transport, energy and building sectors, with a focus on electrification, automation and digitalization. The brand promises "Ingenious for Life", and is driven by its Vision 2020 to make “things that really matter”, pursue sustainable growth, and give all staff responsibility for the company’s success. A recent campaign in India reflected this vision, promoting the power of innovation to fulfill society’s aspirations. Siemens has pledged to contribute to the UN agenda 2030 for Sustainable Development; through Safe Water Enterprises, co-founded by Siemens Stiftung, it supplies around 20,000 liters of drinking water in East Africa. Siemens employs around 377,000 people worldwide.

adidas is the second-largest sporting clothes and footwear brand in the world, and is enjoying strong growth thanks to the global popularity of sports leisure wear and the brand’s association with urban culture. adidas is working to excel in the delivery of the best services and a unique brand experience, and is marking itself out as an innovator. It has a decentralized management approach to allow the brand to be part of the newest trends around the world. Innovations include the Speedfactory, a data-based lab producing shoes that are customized to shoppers’ preferences. And, working with environmental organization Parley for the Oceans, adidas is creating products from plastic waste removed from oceans; already, more than one million pairs of “Ultraboost Parley” shoes have been sold. adidas also created a shoe that incorporates a year’s access to public transport in Berlin. The brand is a heavy investor in sports sponsorship, supporting Real Madrid, FC Bayern München and Manchester United and the German national football team, as well as grassroots sporting activity across a range of disciplines.
Bosch

Company: Robert Bosch GmbH
Brand Value: $10,479 Million
Change since 2018: 7%
Headquarter City: Munich
Category: Conglomerate
Year Formed: 1886

Bosch is a global brand of high-end white goods, power tools and consumer durables, which developed out of a business launched to supply components to Germany’s car industry. Bosch is Europe’s largest manufacturer of home appliances in Europe and generated sales of €78.1 billion in 2017 (up from €73.1 billion in 2016). In its communications, its brand promise is “Bosch. Invented for Life” and it emphasizes its German heritage and high standards of quality to distinguish itself among other global brands in the sector and justify its premium pricing. While Bosch goods tend to be more expensive than average, they appeal to a fairly broad range of potential buyers and the brand does not focus its marketing on only the most affluent households. Bosch also has a large B2B business, supplying power tools to artisans. In October 2018, Bosch became an official partner of the ABB FIA Formula E Championship. The company employs over 400,000 people worldwide. BrandZ™ research covered Bosch’s durables and white goods and small household appliances.

Lidl

Company: Lidl Stiftung & Co. KG
Brand Value: $8,523 Million
Change since 2018: 4%
Headquarter City: Neckarsulm
Category: Retail
Year Formed: 1973

Lidl is one of the pioneers of discount grocery and has taken this model - of high-quality goods at the lowest possible prices – to the world. Today, Lidl operates over 10,000 stores in 29 countries. It offers a broader range of branded products than its main competitor, ALDI, and the assortment includes food and non-food items, with a mix of products available in Lidl stores globally alongside those sourced in the home market of each store. In Germany, Lidl has been expanding its organic food range, and now offers in stores its Lidl cook boxes – meal kits with recipes and the required ingredients. Lidl’s brand promise is “Lidl lohnt sich” (Lidl pays off) and the brand is one of Germany’s largest advertisers. Its “Vielfalt” campaign focused on the breadth of the range, especially in organic goods. The brand sponsors the TV contest Germany’s Next Top Model.

Allianz

Company: Allianz SE
Brand Value: $8,360 Million
Change since 2018: 8%
Headquarter City: Munich
Category: Insurance
Year Formed: 1890

Allianz provides insurance and fund management products to over 86 million customers in more than 70 countries. It is one of the largest property and health insurers in the world, and is among the five largest providers of life and health insurance. Allianz is positioned as a premium brand, and promotes its global scale, many years of experience, service excellence and category competence. Oliver Bäte took over as CEO in 2015 and set about providing the company with a stronger digital presence. Allianz was for many years a major sponsor of Formula 1 motor racing, but in 2017 switched to sponsoring the electric Formula E series, to promote sustainable motorsport. In 2018 Allianz announced it would be one of the main sponsors of the Olympic Games from 2021 to 2028, making it the only German company whose logo will be seen during these events. Since 2004, Allianz has been a supporter of the Paralympics.
Continental has grown from a pure tire manufacturer into one of the largest suppliers to the automotive sector in the world. It is still, however, known primarily for passenger cars, commercial vehicles, industrial vehicles and two-wheelers. “Conti”, as it is known, has a mission to invent, develop, produce and market pioneering technological solutions. The brand’s ambition is to evolve from being the best in braking to achieving zero fatalities, then zero injuries and, ultimately, zero accidents involving its tires. This “Vision Zero” goal is being pursued in partnership with the “Stop the Crash” campaign led by Global NCAP, the worldwide consumer organization for new-car safety testing. It is also developing solutions to make motoring more efficient and comfortable, improve the environment, and make mobility affordable for all. Continental sponsors the Giro D’Italia bicycle race, and in 2018 became a sponsor of the Tour de France, with seven of the 22 competing teams using Continental tires. It also sponsors Bundesliga football club Hannover 96. BrandZ™ research focused on Continental’s tires business.

Beiersdorf AG
Brand Value $7,754 Million
Change since 2018 4%
Headquarter City Hamburg
Category Personal Care
Year Formed 1911

NIVEA is a global personal care brand spanning facial care, cosmetics, haircare, styling, deodorants, shower products, sun protection and specific ranges for children and for men. Products are sold in distinctive NIVEA blue packaging in drugstores and supermarkets, and from NIVEA stores in Hamburg and Berlin. NIVEA frequently releases new products and variants, using innovation to regularly renew interest in the category and the brand. Public concern over ingredients in personal care products regularly puts NIVEA in the news. Recently it has been over microplastics in shower and cleansing products. Since 2016, all NIVEA products have been free of polyethylene particles, but Greenpeace has since highlighted NIVEA and several other brands as producing products with other ingredients that are toxic to marine life. Brand communications in 2018 involved heavy use of celebrity testimonials. German national football coach Jogi Löw endorses the men’s range, and NIVEA has also recruited actress and “Bond girl” Monica Bellucci and musician Robin Schulz.

Porsche is a luxury sports car brand synonymous with design, performance and a combination of innovation and tradition. The brand describes its offering as “Intelligent Performance”; it sells over 240,000 vehicles around the world each year, led by the Macan SUV, the Cayenne SUV and the 911 sports car. Porsche is also the world’s largest race car manufacturer, constructing around 300 dedicated race cars for events every year. Porsche has won the 24 Hours of Le Mans 19 times. Since the “Dieselgate” scandal over emissions testing, Porsche has been focusing its innovation on ways to pursue e-mobility without compromising the sports heritage of the brand. Porsche E-Performance is the brand’s answer to reducing fuel consumption and exhaust emissions, while still delivering an exciting driving experience. An E-hybrid is now in production, and a fully electric Porsche is in the pipeline.

Volkswagen is one of the most successful mid-market carmakers in the world. The brand became famous for classic designs such as the Beetle, the Bull campingvan and the Golf, and is now known for models such as the Jetta saloon car and the Tiguan SUV. The brand is in the process of recovering from the “Dieselgate” emissions scandal, focusing on new mobility trends and demands for more innovative engine technology. In 2019, VW is launching an e-mobility car-sharing service in Berlin called “We Share”, with 2,000 all-electric vehicles. Under the Volkswagen Together Strategy 2025 vision, the brand is seeking to be the world’s leading provider of sustainable mobility. The I.D. Crozz electric vehicle is due to begin sales in 2020. Advertising has dropped the long-standing “Das Auto” tagline and simply uses “Volkswagen”, which means “The People’s Car”. VW sponsors sports teams and programmes in the arts, education and infrastructure. Its biggest market is China.
Millennials don’t listen to traditional advertising. Brands, therefore, have to re-examine their communication, shifting from an above-the-line “push” to a more consumer-centric “pull”. For young audiences today, experiences are the new GRP (gross rating point). Amplification is no longer just a matter of reach, but rather how you integrate your brand in customer experience touchpoints.

Vodafone was a brand craving a new, emotional communication touchpoint – one where they weren’t just receiving complaints. At that point, 91 percent of all comments on Vodafone’s Facebook channel were either gripes or were off-topic.

Our plan: Turn complaints into conversations and set up experiential marketing.

To cut a long story short: Together with [m]science we analyzed the online gaming market. Our team developed a strategy to link Vodafone with e-sports in a way that left no room for the competition. The brand

1. Presented an e-sports highlights show with more than 1 million views per week
2. Launched original content formats on all social channels
3. Ran influencer marketing with raffles, sweepstakes and meetups

The results: Combining the biggest e-sports names and leveraging a 360° activation strategy, Vodafone became the unrivaled #1 (non-endemic) brand in e-sports, raising partnership awareness over 300 percent (from 11 percent to 36 percent). Around 800 million contacts were established in just one year, leading to a rise in brand consideration from 62 percent to 77 percent in the 18-29 age group.

Comments on Vodafone’s e-sports content were 82 percent on topic and 95 percent positive. We transformed the problem of “social complaining” into enthusiastic conversations around e-sports.

Large corporations are increasingly relying on innovative ventures, labs and programs as they seek to expand their core business, tap into new digital market territory, and secure future viability.

Often corporations rush to launch new brands for these activities. It seems they almost instinctively draw a clear distinction between the core brand and their new, digital activities. At Deutsche Bahn, this led to the “10K” project for autonomous local public transport, while Volkswagen’s urban mobility venture was branded “MOIA”.

In branding projects, we usually hear the argument that our client’s company cannot credibly launch digital innovations under its own brand. The image employees have of their company is often distorted. They tend to judge their brand more negatively than the general public.

But can’t we believe that large corporations are innovative? Especially when they prove it with real products?

Anyone who doubts the power of their own core brand to innovate will find it difficult to discard a dusty image later on. As always, when it comes to brand architecture, the challenge is to differentiate between internal and external perceptions.

Brands should let their performance on customer experience touchpoints speak for itself. Because if you innovate, your core brand should feel the benefits.
Knorr is a global food brand best known for its mealmaker products, pasta sauces, soups and bouillons, promising to help make it easy to cook tasty meals. It regularly launches new products and flavors to maintain consumer interest, and in recent years has been gradually building up its popular "Naturally Tasty" line, which launched in 2015 with mealmaker variants and now extends to over 20 mealmakers, plus salad dressings, soups, sauces and ketchup. Recent communications for the range have the tagline "100% natural ingredients. Delicious!". In 2018, Knorr Mein Würzgeheimnis (spices) was added to the Knorr range, underlining the brand's flavor expertise. Sustainability is an increasingly important part of the Knorr brand strategy; taglines in use across the range include "Taste with a good feeling", "Cooking with passion" and "Taste the world".

Deutsche Post is Europe’s largest postal company, delivering more than 64 million letters in Germany every working day and operating approximately 12,000 post offices and integrated stores. The Deutsche Post brand DHL operates globally with a focus on parcels and non-standard logistics, while the Deutsche Post brand is only available within Germany. Its brand promise is "Deutsche Post – Die Post für Deutschland" (the post for Germany). In the past year, CEO Frank Appel has announced cuts in spending with a view to Deutsche Post turning a profit of €5 billion by 2020. This has led to the brand withdrawing its sponsorship of the national football team. Instead, it is supporting a range of other sports, including winter sports, and it has been granted naming rights for the world’s first artificially iced bobsleigh track, in Königssee. In motor sport, the brand has set up a Speed Academy to spot and promote talented young drivers.

Sparkasse is Germany’s leading retail bank, with around 50 million customers and 16,000 branches across the country, including in small villages. Regional Sparkassen are independently managed, so they can focus on the local customers they serve. This personal touch is at the heart of the brand, as well as its innovation, particularly online. Sparkasse offers several banking and payment apps, including Kwitt, for sending and requesting money, and the paydirekt service, which is a competitor to PayPal in Germany. The brand’s communications are strongly associated with the color red in the Sparkasse logo and the claim: "Wenn's um Geld geht – Sparkasse" or "When it comes to money – Sparkasse". For several years, the brand’s promise has been the message "... ist einfach", meaning “it’s simple”, and in 2018 it launched the ‘Gemeinsam allum gewachsen’ campaign (!Together we can do anything!) to promote unity and the courage to solve big problems.
Zalando is a leading online fashion platform, delivering clothing, shoes and accessories to customers in 17 countries. The online store offers products from around 2,000 brands, as well as from 16 of Zalando’s own private labels, or “zLabels”. The brand has set itself apart online by offering free delivery and the right to return unwanted goods for up to 100 days. Such strong focus on returns is unprecedented in retail. This consumer-centricity was at the heart of Zalando’s striking advertising campaign “Scream for Happiness”, which helped popularize shopping for fashion online – and gave delivery workers around the country a memorable reaction when customers got their parcels. Zalando works closely with online influencers and fashion celebrities, hosts live events, and, to mark its 10th anniversary in 2018, partnered with supplier brands on exclusive collections for Zalando. In late 2018, the brand opened its Zalando Campus in Berlin, a new corporate headquarters for more than 5,000 employees.

Deutsche Bank is a German global banking and financial services company with almost 100,000 employees in over 70 countries. Its mission is to “enable economic growth and societal progress”, and to be a strong, safe bank that is well positioned to pursue growth opportunities. Deutsche Bank has 535 branches in Germany for private banking, and is part of the Cash Group, which allows Deutsche Bank customers to use its 9,000 ATMs in Germany fee-free. The brand has dropped its “Passion to Perform” tagline and in mid-2018 launched phase two of its campaign with the tagline “Neue Zeit braucht neues Banking” (“New times bring new banking”). Advertising stars the solo round-the-world yachtswoman Laura Dekker, and positions Deutsche Bank as the enabler at the side of its clients, helping them achieve their goals. The campaign uses the hashtag #positiverBeitrag (#positiveimpact). Christian Sewing became the new Deutsche Bank CEO in April 2018.

EnBW is the third-largest energy supplier in Germany, and primarily serves the state of Baden-Württemberg. Its heritage dates back to an electricity producer founded over a century ago, but it has been known by its current name since being formed by a merger in 1997. EnBW supplies electricity, gas, water and energy-related products and services to 5.5 million customers. The brand has a mission to reshape the energy sector, and aims to have 40 percent of its output from renewables by 2020. EnBW is investing in offshore wind and developing innovations to optimize household energy consumption through smart home services. Brand communications have an off-beat style unusual in the energy sector. Advertising with the tagline “Energy becomes personal” uses amusing stories and unfamiliar images to highlight the personal benefits of a new-energy future. EnBW is a strong supporter of sport and the arts, sponsorships include the EnBW Upper League, and several gymnastics squads.

Unitymedia is the second-biggest cable internet provider in Germany based on the number of homes connected, and is the market leader in the regions of Nordrhein-Westfalen, Hessen and Baden-Württemberg, where it is able to offer download speeds of up to 400 megabits per second. The Unitymedia portfolio also includes digital TV, and fixed-line and mobile phone services. Unitymedia has been the subject of an attempted acquisition by Vodafone, but the deal is subject to approval by anti-monopoly regulators. Since 2017, Unitymedia has run a marketing campaign with the tagline “Was das geht?” (“meaning ‘Wow, that’s possible?’”) across multiple media. Ads mark a departure for the telecommunications category; one YouTube video, for example, features passionate kissing by a series of sometimes unorthodox couples in unorthodox situations. These include a police officer and a suspect, and a young man and woman in the front of a moving car. The ad’s message is ‘When all is hate, you must love’, and promotes unlimited broadband.
### 1&1

**Company**
United Internet AG

**Brand Value**
$2,714 Million

**Change since 2018**
0%

**Headquarter City**
Montabaur

**Category**
Telecom Providers

**Year Formed**
1988

1&1 offers mobile network services, broadband, web hosting, virtual servers and email solutions to individuals, households and small businesses. It has grown into one of the leading providers of data, internet and voice services in Germany. Services are often sold as bundles, positioned as offering the ideal combination of value for money, great connections, and good customer service. It has more than 9 million customers, and is a leader among DSL and mobile service providers. In late 2018, 1&1 teamed up with cloud infrastructure specialist ProfitBricks to form 1&1 IONOS, a web hosting provider that says it’s the first to be able to guide businesses through creating a site, opening an online store and launching their own servers. The brand often pokes fun at rival Deutsche Telekom in its advertising, and for several years TV presenter Kilian Reichert has been the public face of 1&1 ads.

### EDEKA

**Company**
EDEKA Zentrale AG & Co. KG

**Brand Value**
$2,534 Million

**Change since 2018**
8%

**Headquarter City**
Hamburg

**Category**
Retail

**Year Formed**
1898

EDEKA is Germany’s leading grocery retail group, with around 11,400 stores across a range of store formats and sub-brands. Stores are being modernized, as EDEKA works to improve the shopping experience as well as offer products, formats and locations that suit consumers’ needs. EDEKA offers a wide range of private label products, ranging from the economical Gut und Günstig lines, to higher-priced international specialty foods. The private label ranges are highly popular and EDEKA has announced plans to further extend its portfolio. In 2018, EDEKA removed more than 200 Nestlé products from their shelves because they could not reach an agreement on wholesale prices. The business has more than 17,000 trainees, making it Germany’s biggest trainer of staff. EDEKA tends to bring humor to its advertising, often to promote its support for the WWF and other social causes, such as tackling racism. Most EDEKA advertising uses the tagline Wir lieben Lebensmittel (We just love food).

### Miele

**Company**
Miele & Cie. KG

**Brand Value**
$2,460 Million

**Change since 2018**
9%

**Headquarter City**
Gütersloh

**Category**
Home Appliances

**Year Formed**
1899

Miele is a German-based global manufacturer of high-end domestic appliances and commercial equipment, with a focus on kitchen and laundry products. It promises to be “Immer besser” or “Forever better”, and appeals to affluent consumers seeking the highest standards of performance, ease of use, energy efficiency and design. Recent innovations include a dining concept linked to Miele-backed startup MChef; owners of the dialog oven can come home to three-course meals ready to go straight in the oven. Miele has also invented a coffee machine giving users the choice of three different bean types, and a semi-autonomous dishwasher, which dispenses detergent automatically and just leaves the user to load and unload the machine. Many Miele appliances, including the dishwashers, can be controlled and programmed via an app. In 2017-18, Miele grew sales by 2.5 percent in Germany and 4.3 percent globally. Miele products are now available in 47 countries.

### Deutsche Bahn AG

**Company**
Deutsche Bahn AG

**Brand Value**
$2,398 Million

**Change since 2018**
NEW ENTRY

**Headquarter City**
Essen

**Category**
Logistics

**Year Formed**
1872

DB Schenker is a global logistics provider using land transport, air and ocean freight, contract logistics and supply chain management. It sees its role as helping the world do business, ensuring a seamless flow of goods and allowing supply chains to stay lean. DB Schenker has about 2,000 offices and over 72,000 staff around the world. The business has long-standing links with Deutsche Bahn, and a recent Deutsche Bahn campaign also features DB Schenker. The campaign centers on a video ad in which Ex-Formula 1 World Champion Nico Rosberg is running through a train in search of his seat, passing various obstacles, including an Indian wedding party in full swing. When he gets there, punk legend Iggy Pop is in his seat. As the train moves along, a DB Schenker truck is shown traveling in parallel. DB Schenker is the official logistics partner of the German Olympic team.
DPD is a fast-growing parcel delivery network whose initials stand for “Dynamic Parcel Distribution”. There are 6,000 pickup points across Germany and over 32,000 in 35 European countries. There are now 11,000 DPD Germany delivery drivers on the road each day, delivering 375 million parcels a year. DPD is the delivery partner of e-commerce brands ASOS, Home24 and Würth. DPD provides carbon-neutral shipping at no extra cost to the customer – part of the “DrivingChange” strategy. This also includes intelligent urban delivery solutions such as electric vehicles and bikes to reduce congestion, and innovative partnerships such as the ParcelLock joint venture with GLS and Hermes, allowing parcel boxes to be used by multiple courier brands. The new DPD Food delivery service launched with food box provider HelloFresh, using express delivery and precise one-hour delivery slots. It also now serves myTime and Gourmondo. The charitable DPD Foundation works with Plan International and supports DPD staff in need of assistance.

La Poste S.A.

Brand Value $2,269 Million

Change since 2018 -2%

Headquarter City Aschaffenburg

Category Logistics

Year Formed 1976

Lufthansa is a premium international airline with a name for safety, service and the youth of its fleet, which allows it to run efficiently and minimize the effect on the environment. The brand is part of the Star Alliance, and the wider Lufthansa brand family includes Swiss, Austrian and the budget airline Eurowings. In the past year, several airlines in the group experienced a surge in the number of delays, and more than 18,000 flights were cancelled during the affected period. The company blamed air traffic and ground control problems for the chaos, but Carsten Spohr wrote an open letter of apology for the inconvenience caused. Lufthansa has recently changed its logo – one of the best-known designs in the sector. The yellow “fried egg” circle with a blue crane inside taking flight has been refreshed with a dark blue and white design. Lufthansa’s advertising tagline remains “Nonstop You”, and recent campaigns have focused on special moments enjoyed when traveling to different Lufthansa destinations.

dm-drogerie markt GmbH + Co. KG

Brand Value $2,152 Million

Change since 2018 NEW ENTRY

Headquarter City Karlsruhe

Category Retail

Year Formed 1973

dm is the largest chain of drugstores in Germany and is now also present in 13 European Countries. It has around 3,500 branches and 59,000 employees, 40,400 of whom are in Germany. Stores offer well-known health and personal care brands, as well as dm’s own brands, the first of which was introduced in 1986. There are now 21 own brands, including the popular Balea bodycare range, and the increasingly important organic selection, dmBio. The brand’s communications tagline is “Hier bin ich Mensch, hier kauf ich ein” (Here I am human, here I shop). This motto has been part of the dm-drogerie markt logo since 1992. It reflects dm’s commitment to “humanity and partnership” in its relationships with customers, employees, trading partners and the environment. It invests heavily in staff training, and while the brand does little traditional advertising, it works closely with online influencers, including Stefanie Giesinger and Paola Maria.

Hugo Boss AG

Brand Value $2,212 Million

Change since 2018 7%

Headquarter City Metzingen

Category Apparel

Year Formed 1924

Hugo Boss is a premium apparel brand with a strong heritage in men’s business suits but with a range that now extends to modern tailoring, evening wear, casual clothing, shoes and accessories for men and women. Business wear tends to be sold under the BOSS sub-brand, while younger and more casual styles are in the Hugo range. In recent years, the brand has undergone a digital transformation, selling its Hugo collections to wholesale partners via a digital showroom and providing Click & Collect and Order from Store services to consumers. In 2018, Hugo Boss released a limited-edition update to the iconic white BOSS suit worn by Michael Jackson on his Thriller album cover, to mark what would have been his 60th birthday. New celebrity ambassadors for the brand include Anthony Joshua for stretch tailoring, Anwar Hadid for Hugo, and Jamie Dornan for Fragrance Hugo Boss the Scent. Hugo Boss is a major supporter of the arts and sport; it is also the official outfitter of the German national football team.
The Germans see themselves as pioneers in healthy nutrition and sustainable food production, and believe that people in other countries are less aware of such issues. But does this self-image correspond to reality? A look at the TGI Europa study by Kantar Media shows how consumers differ across Europe – and the contradictions within German consumers’ behavior.

For example, in all countries, around 18 percent of consumers buy organic meat, but in Germany, opting for organic meat is mainstream. The country with the highest proportion of regular smoothie drinkers is France (67 percent), while in Germany, only 35 percent drink them regularly, indicating that there could still be potential growth in the German smoothie market.

Which consumers are the most ethical? Here, the TGI Europa data shows how distorted our self-image is in Germany. In fact, a higher percentage of people in Great Britain, France and Spain agree with the statement “I like to pay more for environmentally friendly products” than in Germany. The same applies to “I only buy products from companies whose ethical attitude I can identify with.” Awareness of ethics and ecology is no longer a German peculiarity, but a European phenomenon.

Such apparent contradictions in attitude represent marketing opportunities. Consumer behavior in the 21st century is inherently conflicted: you want to have everything – the highest quality, and ecological and ethical production – and at the same time you want the cheapest prices.

Innovative products and smart communication can offer consumers solutions that correspond to their values; attitudes and behavior and help them avoid psychological conflicts. From vegan sausages to organic discounters, there are ways to help consumers balance their needs. The analysis of consumer behavior and comparisons between countries can highlight the strongest areas of potential.
BRANDZ™ GERMAN TOP 50

TOP 50 MOST VALUABLE GERMAN BRANDS 2019 | BRANDZ™ GERMAN TOP 50

Schwarzkopf
Company: Henkel AG & Co. KGaA
Brand Value: $1,879 Million
Change since 2018: 37%
Headquarter City: Herzogenaurach
Category: Apparel
Year Formed: 1948

Schwarzkopf began as a powdered shampoo with the silhouette of a head on the label that the brand still uses today. There is a range of sub-brands under the single Schwarzkopf umbrella brand. The retail part of the business, which targets consumers directly, includes hair care, styling and hair dye products with the sub-brands Poly, Taft, Seborin and Gliss Kur. A street styling brand, Got2B, is available in Europe. The professional side of the business includes Igora Botanic dyes and Essensity, which focuses on the natural origins of its ingredients. The brand’s tagline is “Professional haircare for you” and ambassadors include actors and models and high-profile haircare professionals. For its 120th anniversary in 2018, Schwarzkopf launched the innovative YouTube campaign “create your style.” The highly successful vignette series positioned the brand as a problem solver and broadened its appeal to a younger audience.

PUMA
Company: PUMA
Brand Value: $2,023 Million
Change since 2018: -12%
Headquarter City: Düsseldorf
Category: Personal Care
Year Formed: 1898

PUMA is one of the world’s leading sports brands, specializing in footwear, apparel and accessories for performance athletes, amateurs and for casual living. Sports supported by the range include football, training, running, golf and motorsports, and PUMA products are sold in more than 120 countries. CEO Bjorn Gulden has announced PUMA’s mission is to be “forever faster”, focusing on five key priorities: brand strength, product, women’s, distribution and organization. He has also pledged to highlight sustainability as a key PUMA value, integrated into all business operations. PUMA-sponsored athletes have included Michael Schumacher and Boris Becker; Spanish footballer Cesc Fabregas is a current PUMA ambassador. The brand also sponsors several football clubs and national teams, as well as athletics teams and individuals. PUMA also works with non-sporting celebrities; singer Rihanna is women’s creative director and global ambassador for women’s training, and the Korean boy band BTS has shot several commercials for the brand. PUMA employs around 13,000 people worldwide.

Persil
Company: Henkel AG & Co. KGaA
Brand Value: $1,868 Million
Change since 2018: NEW ENTRY
Headquarter City: Düsseldorf
Category: Home Care
Year Formed: 1907

Persil is the German market leader in laundry detergent, and is available in most countries around the world. It was the first commercially available “self-activated” laundry detergent, and is the brand that has underpinned the growth of parent company Henkel. The brand takes its name from two of its original ingredients: sodium perborate and sodium silicate. Persil advertising for many years featured the “Persil lady”, drawn by a Berlin artist in the early 1920s, and most Germans know the jingle that accompanied the brand’s tagline “Unser Bestes von Persil” (“Our best from Persil”). Persil represents both tradition and innovation; new product releases aim to improve washing performance and make the laundry experience easier. Its Mega-Caps, for instance, were the first pre-dosed detergent that could be added directly to the washing drum. Persil has been associated with environmental protection since the 1980s; it has developed detergents that work in cold water, and advises consumers on how to use less water.

Rossmann
Company: Dirk Rossmann GmbH
Brand Value: $1,803 Million
Change since 2018: NEW ENTRY
Headquarter City: Burgwedel
Category: Retail
Year Formed: 1972

Rossmann has grown from a single store in Hanover into the second-largest drugstore chain in Germany. Stores carry a vast assortment of goods, ranging from skin and body care items, to baby products, cleaning agents, food and wine, along with photo services and special promotional and seasonal items. Sales have been growing at 6.5 percent a year in Germany and 6.8 percent more widely; the brand operates in several other European markets, including Poland, Hungary, Czech Republic and Albania. Rossmann is rapidly expanding its footprint, having launched 230 new stores in 2018, 105 of them in Germany, taking the total to over 2,100 outlets in Germany and around 3,800 internationally. The brand supports a range of social projects, including the German Children’s Fund, a mentoring project called Die Lassiehelfer, and singing association Klassal’Wir Singen. On International Women’s Day 2018, the logo of a centaur in the O of Rossmann was replaced with a female centaur and online the store was called Rossfrau.
RWE is one of Europe’s leading suppliers of energy, supplying around 20 million homes with electricity, and 10 million with gas. The business launched over a century ago in Essen, in the west of the country, and now operates across not just Europe but also Asia and the USA. RWE’s energy comes from gas, coal, hydropower, biomass and renewable sources such as nuclear. The focus is shifting increasingly towards renewables, and in 2016 the company split off its renewable business into a specialist division, Innogy. The majority stake held by RWE in Innogy will be transferred to E.ON as part of a wide-ranging exchange of assets and business units. RWE’s communications tagline is “ZUKUNFT. SICHER. MACHEN.” (“Making the Future Secure”), and this features in advertising and in the brand’s support for sport, education and culture. It stresses the importance of a sustainable energy supply, and sponsors grassroots organizations in the markets where it operates, particularly those that help young people.

TUI Group is the world’s largest tourism business. It comprises 1,400 travel agencies, online portals, six airlines, over 385 hotels and resorts, and 16 cruise liners. TUI provides around 20 million customers a year with holidays to 180 countries and regions. The TUI smile logo, used by the brand for 13 years, has become one of the most readily recognized symbols in the European tourism industry. Both the logo and the TUI name are now used consistently across the markets in which TUI operates, under a “oneBrand” strategy that saw local operations in the Group, such as the UK’s Thomson, rebrand. Consistent branding helps TUI deliver a consistent consumer experience, as holidaymakers going from flight to airport transfer to hotel will know to “Follow the Smile”. TUI tour operators have a strong presence in Austria, Poland, Switzerland, Denmark, Finland, Norway, Sweden, France, Belgium, the Netherlands, China, Russia and Ukraine. The business employs around 67,000 people.

REWE is a fast-growing supermarket chain focused on innovation, sustainability and shoppers’ changing needs. In 2017, REWE took over 64 Kaiser’s Tengelmann stores, mostly in the city of Berlin, strengthening the brand’s position in the capital, and taking its total number of stores in Germany to almost 3,400. REWE operates a range of formats to suit different shopping occasions, and offers all major brands as well as its popular own brands, including REWE Feine Welt, REWE Bio and Ja!. The supermarket was the first in Germany to offer online grocery ordering, available for home delivery or click-and-collect in stores, and is working to expand this service beyond the 75 cities where it is currently available. REWE has also led the sector in reducing plastic in stores. The brand sponsors FC Köln football club and features footballer Thomas Müller in its communications. Campaigns frequently focus on regional, seasonal fresh produce. REWE is a partner in Payback, Germany’s largest customer loyalty program.
**BRAND PROFILES**

### #41 METRO

**Company** METRO AG  
**Brand Value** $1,414 Million  
**Change since 2018** -22%  
**Headquarter City** Düsseldorf  
**Category** Retail  
**Year Formed** 1963

METRO is a national chain of cash and carry stores that aims to deliver great value for money and customer service to individual consumers and small business customers. The business has expanded over the decades, and now serves 21 million customers in 35 countries. It places great emphasis on earning consumers’ loyalty, and has a structure that allows stores to localize their range and service offerings. METRO advertising has been linked to its support for small businesses and entrepreneurs. The brand is a long-time supporter of the Düsseldorf marathon, now called the METRO Marathon, and supports the annual 19-day cultural event, the Düsseldorf Festival. It has launched the METRO Foundation Sculpture Park, an area within its headquarters campus that celebrates the work of young artists and is open to the public: METRO sponsors German competitors in the Bocuse d’Or contest for top chefs, and is a global cooperation partner of the United Nations World Food Programme, conducting fundraising with employees and customers.

### #42 SIXT

**Company** Sixt SE  
**Brand Value** $1,413 Million  
**Change since 2018** NEW ENTRY  
**Headquarter City** Pullach  
**Category** Car Rental  
**Year Formed** 1912

Sixt is an international car rental service recognizable by its bold black-and-orange logo and its often-daring advertising. In Germany, where it is the market leader, the brand is mainly used for business rentals and promotes the high quality of its fleet – mostly cars of German origin. It has around 2,200 collection stations, and most bookings are made online. Sixt was part of a car-sharing joint venture with BMW called DriveNow, but it withdrew from the partnership when BMW and Mercedes-Benz opened up talks on joining rival service car2go. Sixt has announced a €100 million investment in new mobility services in the coming years; it is already piloting digital self-service rentals at airports. Sixt advertising often pokes fun at events in the news; when a German government minister had her car stolen on a trip to Spain, Sixt billboards shouted “There’s Sixt in Alicante! From €29 per day incl. theft insurance”.

### #43 bofrost*

**Company** bofrost* Dienstleistungs GmbH & Co. KG  
**Brand Value** $1,411 Million  
**Change since 2018** NEW ENTRY  
**Headquarter City** Straelen  
**Category** Food & Dairy  
**Year Formed** 1966

bofrost* has grown from a delivery service begun with just one converted VW bus into Europe’s largest direct seller of frozen food, operating in 13 countries. bofrost* offers householders frozen pastries, vegetables, pizzas, seafood and ice-cream, delivered to their door by the now-famous friendly salesperson and driver, widely known as “the Bofrost Mann” (or woman). This closeness to consumers has helped bofrost* and its competitors in the home-delivery sector – to grow in recent years, as direct feedback from consumers helps inform new ranges and flavors. bofrost* has about 70 percent of the market in Germany, with a network of 115 branches supplying 2.5 million homes via almost 3,000 special deep-freeze vehicles. The brand has a focus on supporting social responsibility programs that help children. The brand recently ran a campaign inviting people to share images online of tasty meals and dining togetherness, and promised to donate one Euro for every photo shared. It also ran an employer branding campaign with the tagline “Here comes your bofrost* moment”.

### #44 LENOR

**Company** Procter & Gamble Co  
**Brand Value** $1,368 Million  
**Change since 2018** NEW ENTRY  
**Headquarter City** Schwabach am Taunus  
**Category** Home Care  
**Year Formed** 1963

Lenor is an international market leader in fabric conditioning, promising softness and freshness for your clothes since 1963. The brand initially focused on consumer demand for cleanliness, and in the 1970s became associated with care for the environment. In the decades that followed, it rode on waves of enthusiasm for wellness and wellbeing, and now positions itself as a partner to self-made women. With its current Lenor Mystery collection, it moves beyond the laundry category to become more like a fashion or cosmetics brand. Innovations over the years have improved the range, with “New Lenor Softness Technology” in 2013 to keep clothes looking newer for longer, and in 2014, a sustainability-driven move to reduce pack sizes by 30 percent without losing efficacy. The brand’s tagline is widely known: “Everybody feels good in Lenor” or in German, “Ich fühle mich wohl in Lenor”. To advertise its new Unstoppables product, Lenor has launched a video spot featuring FC Bayern München football players Alaba, Lewandowski and Müller.
Kaufland presents a unique offering in German retailing – a chain of discount hypermarkets – and one that is expanding across Europe. There are more than 1,250 Kaufland stores in Germany, the Czech Republic, Slovakia, Poland, Romania, Bulgaria and Croatia. As part of family-owned retail group Schwarz, Kaufland’s direction is aligned with the group’s overall expansion and organizational strategy. Much like Lidl, the discount supermarket chain with which it has long been associated, Kaufland has been investing in improvements to stores and services to enhance the customer experience, as well as extending the product portfolio to draw in a wider range of consumers. In 2018, however, Kaufland delisted more than 600 Unilever products, including brands such as Knorr, Langnese and Lipton, saying that it found significant price increases by Unilever unacceptable. Kaufland employs more than 148,000 people.

Company
Kaufland Stiftung & Co. KG
Brand Value
$1,323 Million
Change since 2018
6%
Headquarter City
Neckarsulm
Category
Retail
Year Formed
1984

Commerzbank serves more than 18 million private and small business customers, as well as more than 8,000 corporate clients, multinationals, financial service providers and institutional clients. It finances approximately 30 percent of Germany’s foreign trade and is a major lender to corporate clients. Commerzbank has around 1,000 branches around the country. It has announced a plan to reinvent the bank to become more digital and more efficient, to better suit the changing preferences of consumers, while maintaining excellent personal consulting services. The strategic plan is called Commerzbank 4.0. The bank positions itself as a brand that represents competence and fairness, and it emphasizes business transparency and its fair treatment of people in its communications. The long-running “Die Bank an Ihrer Seite” (“The Bank at Your Side”) in 2018 made way for a new communications approach, stressing dynamism and the new strategic positioning in its “Digital and personal” campaign.

Company
Commerzbank AG
Brand Value
$1,240 Million
Change since 2018
2%
Headquarter City
Frankfurt am Main
Category
Banks
Year Formed
1870

AIDA is a premium cruise holiday brand catering primarily to the German-speaking market. It operates 12 cruise ships and offers holidays in the Mediterranean, Asia, the Americas and the North Sea, ranging from a few days to over 100. The brand positions itself as an innovator and, in response to criticism of the cruise sector for its use of crude oil, in October 2018 launched the first cruise ship powered by liquefied natural gas (LNG). The AIDAnova is also AIDA’s largest ship, with capacity for up to 6,600 passengers. The AIDA brand revolutionized the German cruise market, which previously had a very formal image appealing to older audiences; cruising is now seen as a fun holiday with wider appeal. AIDA is a heavy online advertiser and currently focuses on tailoring trips to specific groups’ needs, such as adventure, wellness, or families. A YouTube mini-series called “The Crew” launched in 2018 to boost AIDA’s employer branding. AIDA ships all feature red lips on the front of the hull.

Company
Carnival Corp
Brand Value
$1,195 Million
Change since 2018
NEW ENTRY
Headquarter City
Rostock
Category
Travel Agencies
Year Formed
1960

Otto has grown from a retailer offering phone-shopping services into the largest online lifestyle and fashion retailer in Europe. To distinguish itself from Amazon, its main competitor, Otto emphasizes a more personalized service, as well as its two-hour delivery window for furniture and large appliances. In late 2018, Otto extended its free next-day delivery offer to include furniture and white goods – which need a two-person team to deliver – in addition to around 12,000 products already available the next day. A 2018 brand campaign highlighted the extensive range of products and services available, with the tagline “Das ist OTTO!” or “That’s OTTO!”. The brand is a big user of YouTube, and in one mockumentary-style campaign tells an amusing story of a washing machine delivery – in a five-minute film that only mentions the Otto brand at the end. Another hit Otto video places a Hungarian stock photo model into a surreal story about delivering a gaming computer.

Company
Otto Group
Brand Value
$1,064 Million
Change since 2018
17%
Headquarter City
Hamburg
Category
Retail
Year Formed
1949

#45
Kaufland

#46
Commerzbank

#47
AIDA

#48
Otto
# 49

**HypoVereinsbank**

**Company**
UniCredit SpA

**Brand Value**
$981 Million

**Change since 2018**
-2%

**Headquarter City**
Munich

**Category**
Banks

**Year Formed**
1998

HypoVereinsbank is one of the leading privately owned banks in Germany and part of the pan-European Banking Group UniCredit, offering a broad range of products for private clients, SMEs and institutional investors. It has over 550 branches in Germany, as well as e-banking options including a mobile banking app. While the brand resulted from a merger in 1998, parts of the business date back to the late 18th century. The brand’s focus is on its long history of developing savings products and linking Germany and Europe to the rest of the world. HBV was not advertising at the time this report was produced, through it has high visibility through its sponsorship of the UEFA Champions League and FC Bayern München. The brand has an extensive art collection, with 14,000 pieces distributed among 400 offices.

# 50

**Krombacher**

**Company**
Krombacher Brauerei Bernhard Schadeberg GmbH & Co. KG

**Brand Value**
$976 Million

**Change since 2018**
6%

**Headquarter City**
Kreuztal-Krombach

**Category**
Beer

**Year Formed**
1803

Krombacher is a premium beer brand that stands out in a crowded market for its close connections with environmental protection, animal welfare and nature conservation more generally. This image is reinforced through the Krombacher conservation project “Artenschutzprojekt”, to which the brand has been using as a brand cue for years, together with the song “Stars will lead the way” by Simple Minds. As many German consumers look for nature conservation more generally, this image is reinforced through the launch of Krombacher Fassbrause in cola and orange flavors, the brand in 2018 launched Krombacher Landbier and Krombacher 0 percent Radler.

## Sharing Intelligence for Shared Benefit

Our data is protected, but is our intelligence owned by Amazon, Google or Apple? At the AsiaCCS 18 conference in South Korea, the first ideas were presented on how to protect AI models with watermarks.

It’s about time that non-profit organizations such as the Mozilla Foundation or the Wikipedia Foundation designed AI platforms in the public domain, accessible to all of us – the very people whose intelligence makes those systems “smart”.

Such a platform could enable private AI systems to be built, and we as owners could decide how they were used and with which social AI networks they could connect.

In contrast to unified AI systems designed by corporations, this system of public and private AlS could guarantee the diversity, accessibility and transparency of intelligence we need in an evolving democratic society.

Wouldn’t it be great to have access to your own personal AI? It would have a much slower learning curve, as it would learn only from you and a selected set of co-trainers, but it would be designed around your context, your belief system, your values, and it could help others - humans or their private artificial intelligence. It could be an AI system trustworthy enough to prepare, predict and maybe even make decisions on our behalf. A key future technology owned by society - us.

So, let’s put artificial intelligence into public hands. Let’s fight for the diversity, accessibility and transparency of Artificial Intelligence!

## Attracting and Retaining the Best Talent

The value of great employer relations

A shortage of skilled workers is not only a challenge for companies, but it also has a detrimental effect on the economy. In Germany, there is currently a shortage of around 440,000 qualified workers (study by the Institut der Deutschen Wirtschaft, 2018). If these positions were filled appropriately, an additional €30 billion in economic output could be realized. But filling high-caliber roles takes a long time – in the case of software developers, it’s currently 159 days, German Federal Employment Agency figures show.

Recruitment campaigns cannot work in isolation. Companies must foster a corporate culture in which people play the central role. Because it is no longer about employer branding, but about employer relations. All efforts need to start inside the organization to build a brand that is authentic, relevant and distinctive. The following five questions will help you:

1. **Where do we stand?**
   Take an honest look inside the organization, at the mission statement and corporate culture, the strengths and challenges.

2. **Where do we want to go?**
   Set goals for the business model and the market, including social responsibility and the required competencies.

3. **Who do we want with us?**
   Which people are right for us? The clearer the image of the target group, the clearer the requirements of the employer will be. Think about both professional skills as well as the overall personality.

4. **What can we change?**
   Organizations will have to restructure and partly reinvent processes, leadership and culture in order to be attractive to the desired target groups.

5. **How do we communicate?**
   Only now is it time to think about communication, core messages, and channels. And to make the employer strategy something that can be experienced both internally by existing employees as well as externally by candidates.

Companies should focus on their future as employers if they are to secure their future as a company.
Brands On Demand
The enduring power of campfire tales

Fail Fast? No Thanks
Bridging the death valley of innovation

Evolution Based On DNA
The balancing act between change and continuity
BRANDS ON DEMAND

THE ENDURING POWER OF CAMPFIRE TALES

"Your brand is what other people say about you when you’re not in the room." - Jeff Bezos, Amazon founder.

Throughout human history, one thing has not changed – that those who tell the best stories are the ones who survive. Even our Stone Age ancestors knew this as they encouraged trade around the campfire. In those days, it was all about flints, blades and hunting magic; today it is mattresses, razor blades and the power of the digital brand.

So, not much has really changed in the hundreds of generations. We humans have always loved convincing stories, and today’s direct-to-consumer brand stories should therefore also be told, in a credible way, around a digital campfire.

We seek meaning, identification and belonging in the stories we hear. Unfortunately, many direct-to-consumer brands still make the mistake of only responding to our needs with quality, reliability or subscription services – but not compelling stories.

These brands often have one key problem in common: The identical performance of competitors in their respective categories. This can turn today’s hot product into the flint of 50,000 years ago - a stone just like any other.

The reason this happens is that too many companies are satisfied to launch a little-differentiated product and a world of brands still make the mistake of only responding to our needs with quality, reliability or subscription services – but not compelling stories.

If digitization has shown us one thing, it’s that speed is everything. Recognizing markets, developing new products and ensuring relevance in a category must all be done at pace.

Then three key steps are crucial for success: a brand must win its way into people’s minds, their hearts – and their front doors. In the age of subscription services, on-demand offers and digital shopping baskets, products find their way to people’s front doors on their own.

The path to the hearts and minds is forged by a brand and a convincing story. It makes the difference between a little-differentiated product and a world that gives us meaning, identification and belonging.

More and more agencies are now offering services that help meet this need for rapid brand development. These “brands on demand” present a new range of services that will quickly, iteratively and in partnership build a brand and a product. They stand for a central brand idea that is consistently reflected in the product, messages and experiences of the consumer.

While platform-driven companies such as Airbnb, Instagram and Pinterest, as first movers, were able to conquer entire markets with one offer, then follow up with the development of a brand and story, the situation today is completely different.

This is especially the case for direct-to-consumer brands.

Think of Dollar Shave Club, Warby Parker, Glossier and Casper. These category champions had a strong brand idea and compelling story right from the start.

The success of the American mattress company Casper shows what’s possible when you have more than a good product and a memorable name. Founded in 2014, the company already has more than one million customers and a value of more than $750 million.

Brands such as Emma, Bruno and Eve also offer “mattress in a box” solutions, but lack the brand credibility that Casper has in the mind of the consumer.

Casper’s brand positioning, “Live a life well slept”, gives the brand scope for expansion. Whether it’s through a mattress, bed frame, duvet or bed linen, Casper positions itself as a reliable provider of quality sleep, a key pillar of overall wellness.

The brand conveys this position through countless content formats on all relevant social media channels. Through its own high-quality magazine, “Wolly”, Casper has also become a media brand.

The essence of the brand is physically embodied in Casper’s Nap Bar, “The Dreamery”, in New York. Visitors can take a Power Nap ($25 dollars for 45 minutes) in a perfect Casper sleeping world. If they also buy a mattress, so much the better.

The Casper brand has become the evangelist for a good night’s sleep and all the positive things that go with it. Coupled with a high aesthetic demand on the products and enthusiasm for social media dialogue with the brand’s fans, it has helped develop a mattress market that in 2019 is light years away from the mattress outlets of a decade ago.

John Hegarty, well-known adman and a partner in the British mattress startup Simba, wanted his brand to do what Casper had already done: “Create a brand, not a business, through an offer that people really love.”
Inventiveness is alive in German companies. There is huge enthusiasm for technology such as augmented reality, voice, face and emotion recognition, robotics, drones, holograms and more. There’s just one problem with innovations: the majority of them fail. After an initial spell of euphoria, many promising new technologies, services and products vanish into obscurity. After nearly every “Wow!” comes an “Oh no!”.

Missing mission
Many German companies don’t have a clear mission when it comes to innovation. In a recent survey of 300 business decision-makers, 50 percent attributed the failure of innovation efforts to the lack of a strategic framework and an objective. Things are done because they are technically possible. Thus, the actual addresssee of the innovation, the user, is overlooked. More than 30 percent of decision-makers see a missing use case as a reason for innovation projects falling flat. These points are the result of a study, “Bridging the Death Valley of Innovation”, by WPP’s different and GroupM together with G+J e|MS.

Hype, hype, hooray?
"Just do it", "be courageous", "try and fail fast" are all mantras from startups that have spread to the corporate world in recent years. The problem is that many innovation projects are hyped by companies before you even know they are relevant to users. Welcome to the “Death Valley of Innovation”, also known as Gartner’s “Trough of Disillusionment”.

From ideation to implementation – the essential step forward
Companies today want to be (and must be) more innovative than ever. Consequently, whole armies of consultants and trainers are available for ideation exercises, and the sails are set. But what is often lacking in the efficient implementation of ideas is the appropriate experience, as well as suitable processes, tools and all-important user orientation. The challenge is no longer to develop ideas. It is in the implementation.

Technology for real life – successfully activating innovations
Frustration is spreading in innovation Germany. Everyone heads to Silicon Valley and comes back with “design thinking”. But most new products and services still don’t really take off. The “Bridging the Death Valley of Innovation” study shows that for 61 percent of people, the most important reason why innovations fail is a lack of ability to assess whether an idea will reach a sufficiently large user base; 59 percent state that innovations are hyped internally without honestly answering the question of customer relevance.

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FAIL FAST?
NO THANKS

BRIDGING THE DEATH VALLEY OF INNOVATION

“The challenge is no longer to develop ideas. It is in the implementation.”

Four ways to bridge the Death Valley of Innovations
Supported by interviews with decision-makers and experts, we have identified four ways to successfully activate and launch technological innovations:

1. Many innovations lack a clear mission. Be sure as marketer that you have a solid understanding of your purpose and the “why” behind your idea. EGO represents your contribution to a better world.

2. The second lever for successful innovation is EMPATHY. The aim is to solve a real problem for users. Many companies make too little effort, work on fake problems or simply construct wrong use cases. EMPATHY is about real understanding of consumer insights.

3. ENGINEERING, the third lever, describes the fact that you have to think your offer lovingly through to the end. Unfortunately, this also happens far too rarely. Often, the more an innovation project thrives, the less user orientation results. Be sure of your hero feature and allow yourself to be ‘perfectly imperfect’. This is ultimately more attractive to consumers.

4. The last activation lever is ENERGY. A real innovation is more than just another product. It is a movement. First of all, people have to be inspired within a business, then the excitement for a new product or a new service builds externally. Energy is more about powerful storytelling than simple selling.

"The challenge is no longer to develop ideas. It is in the implementation.”

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"The challenge is no longer to develop ideas. It is in the implementation.”
The following checklist shows five very concrete attributes for each activation lever, which should help brands innovate for the long term.

**EGO**

**Purpose**
In one sentence: What is the contribution to a better life or society?

**Enemy**
Against which enemy in human life are you fighting?

**Brothers and Sisters in Mind**
Who are your allies from the beginning?

**Objectives**
What is your strategic mission?

**Vivid Picture**
How would you measure your success if there were no numbers?

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**EMPATHY**

**Real User**
Who is the user – beyond stereotypes?

**Pain Points**
What exactly is the real problem for people?

**Value Proposition**
What do you do better than existing alternatives?

**Overcoming the Status Quo**
How do you conquer irrational barriers to change?

**Reality Check**
Does this also work outside of Berlin Mitte?

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**ENGINEERING**

**Key Offering**
Can you put your offer in one sentence?

**Relatedness**
Is what you are offering connectable to your customers’ ecosystems?

**Love at First Sight**
What is your hero feature?

**Answers Over Questions**
Which click is the “click too many”?

**Perfectly Imperfect**
How do you create friction and contact?

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**ENERGY**

**Sell A Dream**
In one sentence – what is your dream?

**Sell A Team**
Who is the face behind your technology?

**Create Rumors**
How do you make others talk about you?

**Partner with Legends**
Which strong partners underline your claim?

**Family First**
How do you inspire your team?

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In a nutshell:

1. The question of technological feasibility must be extended to include the question of human feasibility.
2. Always remember: Fake problems lead to fake innovations. For many companies, customer centricity is unfortunately still just a platitude, not an attitude.
3. In recent years, many companies have invested massively in the methodological knowledge of the “innovation building kit”. But just because the caretaker is now also a Scrum Master doesn’t mean that innovation succeeds automatically.

We would like to encourage you to use this checklist to work on your EGO, EMPATHY, ENGINEERING and ENERGY.

And here’s wishing you a safe trip across the bridge over the Death Valley of Innovation. [https://innovation-death-valley.different.de/](https://innovation-death-valley.different.de/)
EVOLUTION
BASED ON DNA

THE BALANCING ACT BETWEEN
CHANGE AND CONTINUITY

In 1958, the average life expectancy of companies in the S&P 500 Index was 61 years; by 2012 that lifespan had shrunk to just 18 years, and it has since declined further still. The reasons for this: saturated markets, increased customer expectations, and the developing and flourishing of technological innovations that disrupt established companies faster than ever before.

This environment demands constant change, because today only the most relevant brands can continue to grow in the long term. Many companies react to this pressure to innovate by introducing new processes, structures and attitudes. New offers are worked out in a business accelerator; agile teams develop new solutions, and established companies disrupt their own operating models. The focus is on speed, agility and change.

However, the potential gains to be made through a process of renewal are frequently not fully exploited. On the one hand, innovations are often based on new technologies, so opportunities outside the core business can be overlooked. On the other hand, taking up new trends promises quick profits – but then new solutions tend to lack sustainable success. Or innovations rely solely on consumer insights, and the brand’s offering becomes generic. In the long run, therefore, what appear to be innovations can weaken the brand rather than strengthen it.

Just think of NIVEA Beauté, a sub-brand that failed to capitalize on the brand-specific expertise in skin care. Instead, current beauty trends were taken up, resulting in a diffuse brand presence. After more than 10 years, NIVEA Beauté was withdrawn from the market. Or Coca-Cola Life, the more natural and healthier cola variant thanks to the vegetable sweetness of stevia. Consumers reacted hesitantly. For Coca-Cola fans, the product seemed too green and healthy, while consumers in search of natural, healthy beverage alternatives did not think of Coca-Cola as an option for them. Today, the brand is a niche product.

Both cases have one thing in common: the sub-brand lacked authenticity, credibility and recognition. This is a problem in times of decreasing customer loyalty and increasingly fragmented shopping habits. Today, the brand is the glue that holds together different brand touchpoints. This is the only way to create consistent brand experiences and thus build trust, orientation and the motivation to buy.

Successful innovations are characterized by building on a brand’s core promise. This requires an awareness of the attributes that differentiate a brand in its category, and which are seen as strengths by consumers. Only then can the brand itself function as inspiration, filter and guideline in the innovation process, and support the development of credible, authentic solutions. By filtering out weak ideas early on, the process can be accelerated, and costs therefore reduced. The brand perspective also broadens the field of vision for new applications, and stimulates the generation of great, sustainable and unique ideas. Strong innovations can in turn rejuvenate the brand and strengthen the brand core.

Nintendo, a 128-year-old company, is currently revolutionizing the handheld gaming category with its Switch console. Whether the user is in a car, on the train or at home, the game can be played without interruption thanks to the seamless transition between the handheld device and the living room console. This provides a unique, uninterrupted gaming experience. With the Switch console, Nintendo demonstrates its ability to intelligently combine both hardware and software. An increase of 44.5 percent in operating profit confirms the relevance of this innovation and its positive effect on brand success.

Sephora is a French-based, global cosmetics retail chain founded in 1969 with around 300 brands on offer. By incorporating the creation of unique beauty experiences into its DNA, the company has proactively promoted digital transformation at an early stage. Its innovative experiences include an augmented reality tool that allows shoppers to “try out” make-up to see how it would look on them, and an artificial intelligence-powered recommendation system to help people find the right foundation to match their skin tone. These kinds of innovations have helped Sephora become what is now the world’s leading cosmetics retailer.

Successful innovations always require a return to a brand’s DNA and the differentiating strengths of a brand. The successful deployment of these “assets” in such fast-changing times as these requires a business to regularly pause and reflect. This is the only way to promote a permanent process of self-renewal, which is dynamic but not arbitrary.
Made in Germany
How The World Views Germany
How Do We Measure A Country?
Top Of The World
Wish You Were Here?
Surpassing Expectations
Making It Work
Germany has climbed one position in the annual Best Countries ranking, taking third place from the UK in the 2018 league table.

The country has a powerful reputation as an open nation, with a strong commitment to gender equality and government transparency. Germany’s gains in the ranking come about in part as a result of weakening confidence in the UK, which has been negotiating the terms of its departure from the European Union.

Germany’s continued strong showing in the ranking reflects the positive way in which consumers and business leaders regard it against a range of key attributes – not just economic power but “soft power” qualities such as compassion and innovation.

The annual Best Countries ranking measures global perceptions of countries against a series of attributes – impressions that have the potential to drive trade, travel, and investment, and directly affect brands. It was developed by WPP’s VMLY&R BAV Group, and The Wharton School of the University of Pennsylvania, with U.S. News & World Report. The ranking is revealed each year at the World Economic Forum in Davos, the world's largest gathering of global leaders and heads of industry and influence.

The ranking is based on a large global survey, which asks a range of people about how they perceive different countries against a range of key attributes. Impressions of a country matter immensely to brands because the feelings people have about a place are projected onto the brands that come from there. This, in turn, affects what people are likely to buy, and how much they’re willing to pay for it.

This is why labelling olive oil “Produce of Italy” commands a premium, as does “Made in France” when applied to fashion. Likewise, the words “Designed in California” add a certain cachet to a range of personal electronics that are “Assembled in China”.

Just as countries perform an ambassadorial role for the brands they’re home to, brands also perform the same role for their home country. Samsung has helped reshape international views about South Korea, for instance, Sony has done the same for Japan and Japanese products. The reason German cars sell so well around the world is that people believe in German design and engineering – in a large part because of brands like BMW, Mercedes-Benz, Audi and Volkswagen.

How people feel about a country and its brands can, therefore, change over time, depending on the behavior of governments, brands and populations. When all parties are aligned on what they want to stand for abroad – and work together to ensure they deliver on their promises – great things can be achieved. Strong countries fortify strong brands, and the same applies in reverse.
Germany leads the world when it comes to innovation. The place where the car was invented—and repeatedly reinvented ever since—it is also the birthplace of contact lenses, Christmas trees, bicycles, jeans and gummy bears. German engineering and efficiency have become legendary, thanks largely to the continued reliability of its brands. This, along with strong perceptions around innovation, have led Germany to the top of the Best Countries sub-ranking on entrepreneurship.

Germany is first for entrepreneurship out of 80 countries, followed by Japan, the US, the UK and Switzerland. This reflects how well-connected Germany is to the rest of the world, the standards of education among its workforce, the availability of capital and skilled labor, transparent business practices, well-developed infrastructure and well-developed legal framework.

Germany is also gaining a reputation internationally for its political and economic leadership, particularly within the European Union, where it is the largest economy; long-serving Chancellor Angela Merkel is a readily recognized figure on the world stage. Perceptions of the country are also evolving as a result of the government’s willingness to accept refugees from countries affected by war. While somewhat controversial domestically, the policy internationally adds to Germany’s reputation for openness and its promotion of social justice.

What Germany seems to be lacking, however, is approachability. Its scores for being friendly and fun are some way down the rankings; German brands could work on presenting a warmer, more welcoming image as well as focusing on traditional German areas of strength.

"German engineering and efficiency have become legendary, thanks largely to the continued reliability of its brands."
The Best Countries 2018 ranking incorporates the views of more than 21,000 individuals surveyed in 36 countries in four regions: the Americas, Asia, Europe, and the Middle East and Africa. These people included a high proportion of “informed elites” – college-educated people who keep up with current affairs – along with business decision makers and members of the general public.

Respondents are asked about the 80 countries that feature in the 2018 ranking; between them, these countries account for about 95 percent of global Gross Domestic Product, and represent more than 80 percent of the world’s population.

People surveyed for Best Countries are asked how closely they associate 65 attributes with a range of countries. These attributes are then grouped into eight categories, which are used to calculate the Best Countries ranking:

- **Adventure**: A country is seen as friendly, fun, has a pleasant climate, and is scenic or sexy.
- **Citizenship**: It cares about human rights, the environment, gender equality, is progressive, has religious freedom, respects property rights, is trustworthy, and political power is well distributed.
- **Cultural Influence**: It is culturally significant in terms of entertainment, its people are fashionable and happy, it has an influential culture, is modern, prestigious and trendy.
- **Entrepreneurship**: It is connected to the rest of the world, has an educated population, is entrepreneurial, innovative, and provides easy access to capital. There is a skilled labor force, technological expertise, transparent business practices, well-developed infrastructure, and a well-developed legal framework.
- **Heritage**: The country is culturally accessible, has a rich history, has great food, and many cultural attractions.
- **Open For Business**: Manufacturing is inexpensive, there’s a lack of corruption, the country has a favorable tax environment, and transparent government practices.
- **Power**: It is a leader, is economically and politically influential, has strong international alliances and a strong military.
- **Quality of Life**: There’s a good job market, affordable living costs, it’s economically and politically stable, family-friendly, safe, has good income equality and well-developed public education and health systems.

Each of the eight measures is given a weighting in its contribution to the total score for each country, as follows:

The weight of each category in the final index is determined by the strength of its correlation to per capita GDP (at purchasing power parity). As seen in the graphic below, a nation focused on providing great quality of life for its people, which cares about rights and equality, and has a focus on entrepreneurship, is seen as having the most powerful nation brand. This reflects how the world has changed; no longer is it just tanks and banks that give a country influence around the world. Hard power is making way for softer power that comes about as a result of entrepreneurship and cultural exports.

In addition to the eight categories above, a momentum metric called “Movers” represents 10 percent of the index, measuring how different, distinctive, dynamic and unique a country is seen to be.

To see the full Best Countries methodology, visit: https://www.usnews.com/news/best-countries/articles/methodology
Switzerland tops the ranking as it is highly regarded for its citizenship, being open for business, for having an environment that encourages entrepreneurship, offering its citizens a high quality of life, and for being culturally influential.

All of the other countries in the top five also score highly across all of these measures. Canada is especially strong on the citizenship measure. Germany has a similar Best Countries profile to the UK, though Germany is stronger on entrepreneurship and is seen as offering a better quality of life. Japan’s greatest strength is also entrepreneurship, but it also scores highly across all the other measures.

Tourism matters a great deal to the development of a country brand, and not just because tourists buy things when they’re on holiday. The experiences that visitors have while in a country are instrumental in reinforcing or challenging what they thought before they arrived about a whole range of aspects of that country.

Do the trains run on time? Are the people they meet friendly? Does their visit cost more or less than they’d budgeted for? These questions affect overall impressions of a country’s infrastructure, general reliability, trustworthiness and personality.

In turn, these impressions color future expectations of that country’s products and services. If you used public transport on your holiday and every train you took broke down, you’d be unlikely to buy an expensive watch from that country a few years later. Similarly, if you saw unsanitary conditions and pollution, you might reasonably think twice about the food you buy.

Growth in visitor numbers to Germany is currently outpacing the global average, according to the World Tourism Organization. While the average annual increase in tourist arrivals globally is a little under 4 percent a year, the rise in Germany in 2017 (the latest figures available) was 5.3 percent. Since 2013, visitor numbers have risen 18 percent, and in 2016, more than 37 million people arrived in the country, WTO figures show.
German brands can make most of what their country brand already represents in the minds of international consumers, and at the same time contribute to what “Made in Germany” stands for. Brands can use their country of origin to greatest effect when they align with values and positive attributes already associated with that country.

A focus on the following attributes will chime with what consumers around the world feel German brands can offer.

1. Leadership
   Germany’s strong global connections and its leading position in Europe and in global politics gives German brands leverage to position themselves as category leaders with an international outlook and influence to match.

2. Innovation
   For over a century, Germany has been at the cutting edge of design and manufacturing, something that German brands have reinforced. Brands that highlight their innovation credentials will feel authentic to international buyers.

3. Technical excellence
   Respected German brands across a range of sectors, from fashion and beer to cars and appliances, have secured Brand Germany a place in consumers’ minds as the source of world-beating quality.

4. Advocacy for environmental and social justice
   Germany is increasingly becoming known for its focus on green issues, thanks to national policies promoting clean energy, and the population’s propensity to buy organic, recycle waste, and cycle to work. The country’s recent stance on immigration signals openness and fairness. These all reflect well on brands with a green or social mission.

5. Value that justifies a premium
   German goods and services aren’t expected to be a bargain; in fact, the opposite is true. Yet there is a clear feeling that it’s worth paying extra for “Made in Germany”. The premium pricing is reassuring, and links to expectations of quality and longevity.

Germany Trade & Invest (GTAI) – the country’s foreign trade and inward investment agency – has launched a global campaign to encourage enterprises from around the world to see Germany as an appealing place in which to do business.

The “Germany Works” campaign promotes the sectors in which Germany has traditionally been strong, such as automotive and logistics, as well as newer areas of expertise, like green energy, life sciences and “smart” machinery.

At the heart of the campaign is an animated video depicting an engine driven by a range of different areas of strength, all working in unison. It describes Germany’s “permanent quest for better solutions” and will be promoted online in videos and online banners, as well as in print titles such as The Financial Times and New York Times, and on TV networks including the BBC, Bloomberg and CNN.

GTAI CEO Dr Robert Hermann says: “Germany not only meets all the requirements for reliability among business partners and public stakeholders, but it also stands for dynamism, drive and innovativeness. The campaign does an excellent job of knowing how to convey just how reliable Germany is as a business location.”
RESOURCES

BrandZ™ Brand Valuation Methodology
BrandZ™ Genome Mapping – The Science Behind Our Art
WPP Company Contributors
Kantar in Germany
WPP in Germany
BrandZ™ Online & Mobile
WPP Company Brand Building Experts
BrandZ™ German Top 50 Team
BrandZ™ Valuation Contacts
INTRODUCTION

The brands that appear in this report are the most valuable in Germany. They were selected for inclusion in the BrandZ™ Top 50 Most Valuable German Brands 2019 based on the unique and objective BrandZ™ brand valuation methodology that combines extensive and on-going consumer insights with rigorous financial analysis.

The BrandZ™ valuation methodology can be uniquely distinguished from its competitors by the way we use consumer viewpoints to assess brand equity, as we strongly believe that how consumers perceive and feel about a brand determines its success and failure. We conduct worldwide, on-going, in-depth quantitative consumer research, and differentiates the BrandZ™ methodology from competitors that rely only on a panel of “experts”, or purely on financial and market desktop research.

Before reviewing the details of this methodology, consider these three fundamental questions: why is brand important; why is brand valuation important; and what makes BrandZ™ the definitive brand valuation tool?

Importance of Brand

Brands embody a core promise of values and benefits consistently delivered. Brands provide clarity and guidance for choices made by companies, consumers, investors and other stakeholders. Brands provide the signposts we need to navigate the consumer and B2B landscapes.

At the heart of a brand’s value is its ability to appeal to relevant customers and potential customers. BrandZ™ uniquely measures this appeal and validates it against actual sales performance. Brands that succeed in creating the greatest attraction power are those that are:

- Meaningful
  - In any category, these brands appeal more, generate greater “love” and meet the individual’s expectations and needs.
- Different
  - These brands are unique in a positive way and “set the trends”, staying ahead of the curve for the benefit of the consumer.
- Salient
  - They come spontaneously to mind as the brand of choice for key needs.

Importance of Brand Valuation

Brand valuation is a metric that quantifies the worth of these powerful but intangible corporate assets. It enables brand owners, the investment community and others to evaluate and compare brands and make faster and better-informed decisions.

Brand valuation also enables marketing professionals to quantify their achievements in driving business growth with brands, and to celebrate these achievements in the boardroom.

Distinction of BrandZ™

BrandZ™ is the only brand valuation tool that peels away all of the financial and other components of brand value and gets to the core – how much brand alone contributes to corporate value. This core, what we call Brand Contribution, differentiates BrandZ™.

Step 1: Calculating Financial Value

Part A

We start with the corporation. In some cases, a corporation owns only one brand. All Corporate Earnings come from that brand. In other cases, a corporation owns many brands, and we need to apportion the earnings of the corporation across a portfolio of brands.

To make sure we attribute the correct portion of Corporate Earnings to each brand, we analyze financial information from annual reports and other sources, such as Kantar Consulting. This analysis yields a metric we call the Attribution Rate.

We multiply Corporate Earnings by the Attribution Rate to arrive at Brand Earnings, the amount of Corporate Earnings attributed to a particular brand. If the Attribution Rate of a brand is 50 percent, for example, then half the Corporate Earnings are identified as coming from that brand.

Part B

What happened in the past – or even what’s happening today – is less important than prospects for future earnings. Predicting future earnings requires adding another component to our BrandZ™ formula. This component assesses future earnings prospects as a multiple of current earnings. We call this component the Brand Multiple. It’s similar to the calculation used by financial analysts to determine the market value of stocks (Example: 6X earnings or 12X earnings). Information supplied by Bloomberg data helps us calculate a Brand Multiple. We take the Branded Earnings and multiply that number by the Brand Multiple to arrive at what we call Financial Value.

Step 2: Calculating Brand Contribution

So now we have got from the total value of the corporation to the part that is the branded value of the business. But this branded business value is still not quite the core that we are after. To arrive at Brand Value, we need to peel away a few more layers, such as the in-market and logical factors that influence the value of the branded business, for example: price, availability and distribution.

What are the after is the value of the intangible asset of the brand itself that exists in the minds of consumers. That means we have to assess the ability of brand associations in consumers’ minds to deliver sales by predisposing consumers to choose the brand or pay more for it.

We focus on the three aspects of brands that we know make people buy more and pay more for brands: being Meaningful (a combination of emotional and rational affinity), being Different (or at least feeling that way to consumers) and being Salient (coming to mind quickly and easily as the answer when people are making category purchases).

We identify the purchase volume and any extra price premium delivered by these brand associations. We call this unique role played by brand, Brand Contribution. Here’s what makes BrandZ™ so unique and important. BrandZ™ is the only brand valuation methodology that obtains the customer viewpoint by conducting worldwide on-going, in-depth and consistent quantitative consumer research, online and face-to-face, building up a global picture of brands on a category-by-category and market-by-market basis.

Step 3: Calculating Brand Value

Now we take the Financial Value and multiply it by Brand Contribution, which is expressed as a percentage of Financial Value. The result is Brand Value. Brand Value is the dollar amount a brand contributes to the overall value of a corporation. Isolating and measuring this intangible asset reveals an additional source of shareholder value that otherwise would not exist.

Eligibility Criteria

Each of the brands included in the BrandZ™ Top 50 Most Valuable German Brands 2019 must meet the following criteria:

1. The brand is originated in Germany
2. And is owned by a publicly listed company traded on a credible stock exchange, or its financial information is available in the public domain.
All methodologies use financial research and sophisticated mathematical formulas to calculate current and future earnings that can be attributed directly to a brand rather than to the corporation. This exercise produces an important but incomplete picture.

What’s missing? The picture of the brand at this point lacks input from the people whose opinions are most important – the consumer. This is where the BrandZ™ methodology and the methodologies of our competitors part company.

How does the competition determine the consumer view?
Interbrand derives the consumer point of view from different sources like primary research and panels of experts who contribute their opinions. The Brand Finance methodology employs a complicated accounting method called Royalty Relief Valuation.

Why is the BrandZ™ methodology superior?
BrandZ™ goes much further and is more relevant and consistent. Once we have the important, but incomplete, financial picture of the brand, we communicate with consumers, people who are actually paying for brands every day, regularly and consistently. Our ongoing, in-depth quantitative research includes 3.6 million consumers and more than 120,000 brands in over 50 markets worldwide. We have been using the same framework to evaluate consumer insights since we first introduced the BrandZ™ brand building platform in 1998 which allows historical understanding of the change in brand equity.

What’s the BrandZ™ benefit?
The BrandZ™ methodology produces important benefits for two broad audiences:

1. Members of the financial community, including analysts, shareholders, investors and C-suite, depend on BrandZ™ for the most reliable and accurate brand value information available.
2. Brand owners turn to BrandZ™ to more deeply understand the causal links between brand strength, sales and profits, and to translate those insights into strategies for building brand equity and fueling business growth. Since we have been using the same framework to measure these insights, this enables historical and cross-category comparisons.
One of humanity’s greatest recent achievements was successfully sequencing our own genome in 2003, revealing the key building blocks of what makes us each unique.

The BrandZ™ Brand Genome visualises your brand’s “genome” on a page, with all the genome sequence measures providing an instant overview of your brand.

The ultimate tool for a new business pitch and a lot more

Brand Genome is a unique BrandZ™ tool, exclusive to WPP. It’s free, available 24/7 and takes just seconds to create.

Visit [http://genome-measures.wppbrandz.com](http://genome-measures.wppbrandz.com) where you will be able to find out about each of the BrandZ™ measures, what they are, how they are calculated and how you can access a report which contains the measure.

To download a sample genome map visit: [http://wppwrap.com/bg.pdf](http://wppwrap.com/bg.pdf)
We wrote the book

**BrandZ™ Country Reports:**

- **BrandZ™ Top 50 Most Valuable German Brands 2019**
- **BrandZ™ Top 75 Most Valuable Global Retail Brands 2018**
- **BrandZ™ Top 100 Most Valuable Global Brands 2018**
- **BrandZ™ Top 75 Most Valuable Global Brands 2018**
- **BrandZ™ Top 50 Most Valuable Latin American Brands 2018**
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WPP has been in China for over 40 years. We know the Chinese market in all its diversity and complexity. This experience has gone into our series of BrandZ™ China reports. They will help you avoid mistakes and benefit from the examples of successful brand builders.

SPOTLIGHT ON...

Spotlight on Cuba
Cuba is a market unparalleled both in the Caribbean region and the world. Brand awareness among Cubans is high, but gaining access to them uniquely challenging. Now is the time to plan your Cuba strategy.
brandz.com/article/spotlight-on-cuba

Spotlight on Mongolia
Mongolia’s GDP has grown at rates as high as 17 percent in recent years, encouraging a growing number of international brands to gravitate toward this fast-growth market and make a beeline for one of Asia’s hidden gems.
brandz.com/article/spotlight-on-mongolia

Unmasking the Individual Chinese Investor
brandz.com/article/unmasking-the-individual-chinese-investor-report

The Power and Potential of the Chinese Dream
brandz.com/article/chinese-dream-report

The Chinese Golden Weeks in Fast Growth Cities
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The Chinese New Year in Next Growth cities
brandz.com/article/chinese-new-year-report
WPP COMPANY CONTRIBUTORS

BAV Group is a global consultancy with expertise in consumer insights and brand marketing strategy. Using BrandAsset® Valuator, a proprietary brand management tool and global database of consumer perceptions of brands, BAV informs strategic and creative solutions that drive business results. Over 25 years, BAV has captured data and consumer insights on more than 60,000 brands in 50 countries around the world, evaluating 75 brand image and equity dimensions that matter. BAV Group is a unit of WPP (NYSE: WPP), the world's largest creative communications group.

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Different Since 1997 different has acted as a mentor and unconventional thinker for ambitious brands. different helps companies to find relevance as a brand in the hurly-burly of the digital era, to find their promise to the world, to truly deliver on that promise with strong products and services and to live each day with a motivated team. With its customers different develops new products, services and business models, helps organisations to become agile and future-ready, and makes teams and employees fit for the digital age. Since October 1st 2017, different has been a proud member of the SYZYGY Group.

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Hirschen Group
The Hirschen Group was founded in 1995 and is one of the largest owner-managed agency groups in Germany. Almost 800 employees serve over 300 clients at sites in Berlin, Hamburg, Dresden, Köln, Stuttgart, München, Frankfurt, Wien and London with a total billing volume of over 470 million euros. It is a platform for a wide variety of communication and consulting agency brands that offer creative advice for communication, digitalization and public opinion.

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We were born in Asia in 1997, as a start up with a desire to change the media world. Now we are a global agency with 116 offices in 84 countries and billings of $35bn (source: RECM). We aim to be our clients’ lead business partner, to grow their businesses and drive profitability through adaptive and inventive marketing. We do this through speed, teamwork and provocation because in today’s world everybody and ends in media. We create new things and have fun doing it. Mindshare is part of GroupM, the media investment management arm of WPP, the world’s leading communications services group.

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To learn more about how to obtain valuable insights applicable to all business areas contact:

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TOP 50 MOST VALUABLE GERMAN BRANDS 2019

RESOURCES

132

133

6 RESOURCES

BRANDZ™ GERMAN TOP 50 TEAM

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Nikhil Banga is a BrandZ™ Valuation Manager for Kantar Millward Brown. He looks after brand valuation projects in BrandZ™ for various countries.

Victoria Becker
Victoria Becker is Marketing Executive at Kantar Millward Brown. Together with Hartmut Scheffler and Martin Koegel she is leading the local marketing communications, PR and launch event activities for the new ranking.

Jo Bowman
Jo Bowman has worked for newspapers in Australia before moving to Hong Kong to specialize in business writing with a focus on Asian branding and marketing. She has since worked in Italy and the UK, as a writer and editorial consultant.

Bernd Buechner
Dr. Bernd Buechner is Managing Director of Kantar Millward Brown Germany, ensuring that the team delivers on its mission to help brands grow by delivering meaningful impact.

Thomas Deneke
The WPP Director is Client Director at Kantar Millward Brown and responsible for Business Development. Along with the team he actively promotes BrandZ™ Germany among the marketing community in Germany.

Lucy Edgar
Lucy Edgar is the Global Marketing Manager at Kantar Millward Brown where she is responsible for the PR, marketing and communications on the BrandZ™ projects.

David Roth
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The consumer viewpoint is derived from the BrandZ™ database. Established in 1998 and constantly updated, this database of brand analytics and equity is the world’s largest, containing over 3.6 million consumer interviews about more than 120,000 different brands in over 50 markets.

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