BRANDZ TOP 30 MOST VALUABLE DUTCH BRANDS 2020
Top 10 most valuable Dutch brands

1. Royal Dutch Shell
   - Brand Value: 19,016 (USD Mil)
   - Category: Energy
   - YoY Change: -7.9%

2. Heineken
   - Brand Value: 12,594 (USD Mil)
   - Category: Beer
   - YoY Change: 6.0%

3. Booking.com
   - Brand Value: 12,199 (USD Mil)
   - Category: Travel services
   - YoY Change: 2.8%

4. Philips
   - Brand Value: 10,965 (USD Mil)
   - Category: Technology
   - YoY Change: 2.3%

5. ING
   - Brand Value: 8,729 (USD Mil)
   - Category: Banks
   - YoY Change: -18.6%

6. KPN
   - Brand Value: 4,573 (USD Mil)
   - Category: Telecom providers
   - YoY Change: 11.0%

7. Rabobank
   - Brand Value: 3,920 (USD Mil)
   - Category: Banks
   - YoY Change: -4.4%

8. ABN AMRO
   - Brand Value: 2,793 (USD Mil)
   - Category: Banks
   - YoY Change: -17.7%

9. Ziggo
   - Brand Value: 2,575 (USD Mil)
   - Category: Telecom providers
   - YoY Change: -5.1%

10. Spar
    - Brand Value: 1,976 (USD Mil)
    - Category: Retail
    - YoY Change: 3.4%

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Total value of the Dutch Top 30 Brands in 2020

US$ 92,103 million

Change since 2019

-1%

The Dutch Top 30 breakdown (by category)
Brand values in US$ million

- Banks
  - Total Value: 15,593 (USD Mil)
  - YoY Change: -16%

- Beer
  - Total Value: 15,296 (USD Mil)
  - YoY Change: 4%

- Beverages
  - Total Value: 1,255 (USD Mil)
  - YoY Change: 6%

- Energy
  - Total Value: 19,016 (USD Mil)
  - YoY Change: -8%

- Food
  - Total Value: 145 (USD Mil)
  - YoY Change: -25%

- Insurance
  - Total Value: 2,033 (USD Mil)
  - YoY Change: -10%

- Online Food Delivery
  - Total Value: 1,592 (USD Mil)
  - YoY Change: 52%

- Retail
  - Total Value: 6,394 (USD Mil)
  - YoY Change: 53%

- Technology
  - Total Value: 10,965 (USD Mil)
  - YoY Change: 2%

- Telecom Providers
  - Total Value: 7,147 (USD Mil)
  - YoY Change: 2%

- Travel Services
  - Total Value: 12,667 (USD Mil)
  - YoY Change: 3%

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Top Risers:

- Thuisbezorgd.nl (Takeaway.com): 52%
- Hertog Jan: 8%
- Senseo: 10%
- Action: 122%

Newcomers:

- bol.com: 52%
I am thrilled to introduce you to this second annual BrandZ™ Top 30 Most Valuable Dutch Brands ranking.

In challenging times, strong brands survive and thrive. This groundbreaking study returns to rank the Netherlands’ most valuable brands. It identifies their strengths as well as areas for improvement, while providing fresh insight into the wider Dutch economic and cultural context. It is your guide to one of Europe’s most vital economic linchpins, and its exciting brand landscape.

In recognition of the Netherlands’ key role as a continental crossroads, our BrandZ™ valuations team first began analyzing Dutch brands in depth in 2019. This year and last, our groundbreaking BrandZ™ analytics have shown how brands can cultivate Meaningful Difference to outperform the market and their peers.

At the close of a challenging decade for Europe, the Netherlands has remained as a bastion of resilience and recovery. Today the country’s growth rate is solid compared to its peers, unemployment is at all-time lows, and leading brands like Booking.com and Heineken are on the march worldwide. At the same time, strong domestic players like bol.com and Coolblue, our two new entrants in the 2020 rankings, have flourished by emphasizing traditionally Dutch notions of service, value, and playful personality.

The Netherlands’ most valuable brand in 2020, Royal Dutch Shell, is also the most valuable energy brand in the world.

None of this is to ignore the difficulties that may lie ahead for the Netherlands and its European neighbors. Trade disputes, the threat of a global slowdown, and Brexit have darkened the economic forecasts for some Dutch brands. Thanks to earnings declines among a few large Dutch companies, the overall value of the BrandZ™ Dutch Top 30 declined by 1 percent this year compared to last.

But as longtime readers of BrandZ™ already know, financial data represents only one part of the overall calculus that defines overall brand value. And the good news is that even in the face of economic headwinds, many Dutch brands have retained the highest average levels of brand health, Meaningfulness, and Brand Love in all of Europe. Because of this, the Netherlands is already better positioned than most countries to win in the coming decade - all while pursuing innovative new standards of brand excellence.

To that end, we are pleased to provide market wisdom and expert insights from WPP and Kantar companies all across the Netherlands through extensive Thought Leadership and Brand Building Best Practices essays. On page 18, Takeaways provide direct, action-oriented recommendations for brands based on our expert analysis of the market. We have also included capsule summaries of the Netherlands’ Top 30 most valuable brands. Taken together, they paint a picture of the many ways that Dutch brands are navigating a dynamic business environment with creativity, pragmatism, and aplomb.

Our BrandZ™ reports serve as a cornerstone of understanding the global and local perspectives businesses need to succeed worldwide. They remain the world’s largest consumer-focused source of brand knowledge and insight, powered by our proprietary BrandZ™ brand valuation methodology. We start by examining relevant corporate financial data and stripping away everything that doesn’t pertain to the branded business. Then we take the unique step of conducting ongoing, in-depth quantitative consumer research with more than 170,000 consumers annually, across more than 50 countries, to assess consumer attitudes about, and relationships with, over 100,000 brands.

If you enjoy this report, we invite you to examine our extensive BrandZ™ library. This year, the Netherlands is joined by many other recent entrants to the BrandZ universe, such as Japan, Germany, and Australia. These titles sit alongside long-running annual studies like the BrandZ™ Top 100 Most Valuable Global Brands, BrandZ™ Top 100 Most Valuable Chinese Brands, and BrandZ™ Top 75 Most Valuable Indian Brands.

At WPP and Kantar, we’re passionate about using our creativity to build strong, differentiated brands that deliver lasting shareholder value. To learn more about how to apply our experience and expertise to benefit your brand, please contact any of the WPP and Kantar companies that contributed expertise to this report. Turn to page 184 for summaries of each company and the contact details of key executives. Or feel free to contact me directly.

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Introduction
THE NETHERLANDS SURVIVES AND THRIVES

When King Willem-Alexander addressed the Dutch Parliament recently to outline the Netherlands economic forecast for 2020, he stuck to the no-nonsense headlines: “National debt is under control and the tax burden can be lowered,” he said. But at the same time, he added, GDP growth likely would slow to 1.5 percent in 2020, down from 2.5 percent in 2018. “The approaching Brexit casts its shadow forward,” the King said. “It’s a profit warning for the short term and the long term, that forces us to consider how the Netherlands will earn money in the future and remain a country with good social services.”

This is all fitting and true enough (although in a society increasingly concerned with notions of fairness, debates still rage about cutting taxes). But what a straightforward recitation of the Dutch economy’s fundamentals misses is just how unusual the country’s journey has been in the past decade.

There has been an undeniable dynamism to the Netherlands’ trajectory ever since the crisis years of 2012 and 2013. Since then, the country has quickly recovered from recession to stand alongside the Netherlands to be a natural option to host financial institutions looking to move their European operations outside of London, many expected the Netherlands to be a natural option to host them thanks to its close proximity, strong financial infrastructure, and English-speaking workforce. In reality, however, ever since the 2012-2013 banking crisis the Dutch have shown little desire to turn itself better positioned than most to survive and thrive in the years ahead. As a small country, the Netherlands has always been vulnerable to outside forces shaping its story. But now more than ever, the Dutch also possess the strength and determination to write their own narrative for a brighter future.

For the Dutch finance system, what all of this means is that instead of receiving an influx of foreign bankers, the Netherlands will have to write its own story of growth and recovery. Because banking will undoubtedly remain a vital part of the Dutch economy – it’s one of the Netherlands’ oldest and most famed industries, after all, and can still be one of its most valuable going forward. The difference today is that instead of relying on an complex financial engineering to secure growth, Dutch banks have been charged by society to tap other sources of innovation: in areas like fintech, payments, and agricultural finance – so-called examples of “boring banking” that are, in fact, anything but.

Similarly, in the realm of retail and consumer-facing brands, the Netherlands has rejected any narrative that suggests its home-grown offerings are destined to be overrun by major global corporations. For such a small domestic market (both in area and GDP), the Netherlands has continued to nurture a surprisingly strong brand portfolio. Local retailers like bol.com and Albert Heijn have more than withstood the likes of Amazon and Aldi; and many more Dutch brands besides – including HEMA, thuisbezorgd.nl, Booking, and Action – have actually expanded outward to become bigger world and regional players. Indeed, in category after category, the Netherlands has defied conventional wisdom about what’s possible in a small country. For instance, few would expect a country the size of the Netherlands to be the second-largest agricultural exporter by value - but that’s exactly the case today. This feat was made possible by the country’s embrace of data-enriched, innovative, collaborative way that many Dutch cities have so boldly decided to pivot away from consumer technology to bet on health devices? The Netherlands has most notably diverted from its expected narrative in the runup to Brexit. With major financial institutions looking to move their European operations outside of London, many expected the Netherlands to be a natural option to host them thanks to its close proximity, strong financial infrastructure, and English-speaking workforce. In reality, however, ever since the 2012-2013 banking crisis the Dutch have shown little desire to turn Amsterdam into the next London or Frankfurt. The Netherlands has continued to nurture a surprisingly strong brand portfolio. Local retailers like bol.com and Albert Heijn have more than withstood the likes of Amazon and Aldi; and many more Dutch brands besides – including HEMA, thuisbezorgd.nl, Booking, and Action – have actually expanded outward to become bigger world and regional players. In category after category, the Netherlands has defied conventional wisdom about what’s possible in a small country. For instance, few would expect a country the size of the Netherlands to be the second-largest agricultural exporter by value - but that’s exactly the case today. This feat was made possible by the country’s embrace of data-enriched, hydroponic, and “smart greenhouse” technologies to more efficiently bring plant, food, and animal products to market. It’s a rural analogue to the innovative, collaborative way that many Dutch cities have served as incubators for fintech, data analytics, and design startups.

None of this is to suggest that the Netherlands future is without risk. Growing pains in the finance sector could turn ugly if they lead to a decrease in ordinary people’s pensions. The country’s food and agriculture industry will increasingly come into conflict with the Netherlands’ sustainability goals.

And meanwhile, Dutch consumer confidence is already trending negative for the first time in years - no doubt because people are already starting to worry, and rightly, about the impact of Brexit. In the sociological realm, debates over issues like “Black Peter” and religious dress have exposed tensions in an increasingly multicultural society, while recent terrorism and drug-crime incidents have shown that the Netherlands is in no way insulated from the problems of the wider world. And perhaps we should mention Brexit again, just for good measure?

Nevertheless, the key differentiator here is that the Netherlands is willing to face these risks by taking risks - and smart risks, at that. As a result, it will find itself better positioned than most to survive and thrive in the years ahead. As a small country, the Netherlands has always been vulnerable to outside forces shaping its story. But now more than ever, the Dutch also possess the strength and determination to write their own narrative for a brighter future.
In a challenging macroeconomic environment, the BrandZ™ Top 30 Most Valuable Dutch Brands are worth a combined €92 billion. This is down a slight 1 percent from the year prior, and is in line with declines seen in countries such as the UK (down 3 percent) and Australia (down 5 percent).

Statistically speaking, the Netherlands’ mildly negative trend in total brand value can be attributed to earnings declines among a few of the country’s biggest companies. However, brand marketing in the Netherlands remains relatively strong, with top Dutch brands leading Europe in average measures of overall brand health (the metric known as vQ), as well as Meaningfulness (i.e. making a positive difference to people’s lives) and Salience (i.e. being recognizable and top of mind at the time of purchase).

The overall growth picture also masks wide swings in how brands fared during this second year of the BrandZ™ Dutch Top 30 rankings. Of the 28 returning brands on this year’s list, seven grew their brand value by more than 5 percent, 11 were essentially flat, and ten declined in brand value by more than 5 percent. One clear sign that the Netherlands remains a competitive brand ecosystem: the minimum brand value needed for a brand to win a place in the Dutch Top 30 grew 18 percent this year versus last.

Royal Dutch Shell handily retains its top spot in the BrandZ™ Top 30 Dutch Brands rankings, with a total value of more than $19 billion. Though it declined 8 percent this year (in part due to structural headwinds in the energy industry), Royal Dutch Shell once again accounts for more than a fifth of the Dutch Top 30’s total brand value. Royal Dutch Shell also retains its crown as the most valuable energy brand in the most recent BrandZ™ Global rankings.

Top Dutch brands are worth more relative to national GDP than is the case in many other leading countries. While the total value of top brands in countries like Japan, Spain, and Italy have underperformed relative to those countries’ GDPs, Dutch brands as a group have outperformed relative to the Netherlands’ GDP. What this means, first and foremost, is that top brands remain crucial to the overall Dutch economy, in both good times and bad.

Compared to other markets ranked by BrandZ™, the value of Dutch brands is more concentrated among a few top performers. The Netherlands’ top 10 brands account for a higher percentage of value of the national Top 30 – 86 percent – than any other ranked country. Given this concentration, changes in just two or three brands can have (and did have) a major impact on the year-to-year value of the Dutch Top 30.

This year saw two new entrants to the Dutch Top 30. Both are major players in the field of online retail: Coolblue (which claimed the 16th spot in the rankings) and bol.com (18th). Retail was among the big risers in terms of year-on-year percentage change, growing significantly on the strength of existing brands like Action as well as strong results for these new entrants.

For the second year in a row, Banks ranks as the second-largest category in the Dutch Top 30, with 17 percent of the rankings’ total value (behind Energy at 21 percent). However, macroeconomic challenges in global banking industry have negatively impacted the share price – and thus, the brand value – of many Dutch banks. The good news is that these banks have retained their core brand strengths in many BrandZ™ metrics. This suggests that Dutch banks are positioned to weather macro difficulties better than many of their global peers.

The Top 30 Dutch brands include a mix of domestic and international brands – but the country’s biggest brands tend to have a large presence in the global market. This means that the Netherlands’ Top 30 Brands have a relatively high measure of a metric called overseas exposure – with the Netherlands outperforming countries like the United States, Japan, Australia, India, and China on this score. Needless to say, this exposure to the global economy comes with its benefits and drawbacks. But given the Netherlands’ small size, it’s probably to be expected that some 44 percent of top Dutch brands’ value comes from overseas.
TOP 5 LEARNINGS FOR MARKETERS

1. STRONG BRANDS FARE WELL

The BrandZ™ historical data shows that strong brands worldwide are better positioned to withstand macroeconomic shocks, and recover more quickly from global downturns. Even in this slightly down year for overall Dutch brand value, the data is clear: strong brand equity continues to drive value growth. Growing brands scored significantly higher on measures of Meaningfulness, Difference, and Salience than flat and declining brands.

2. MEANINGFULNESS IS A KEY FIRST STEP

Among the major drivers of brand equity, Meaningfulness stands out as especially important in the Netherlands: even more than Difference and Salience, Meaningfulness is key to driving both demand and price premium in The Netherlands. Fortunately, top Dutch brands are by and large a Meaningful bunch: they scored an average of 124 (versus a global brand average of 100). This figure sits above the global average of 122, and is greater than the average Meaningful score for top brands in all other ranked European countries.

3. DIFFERENCE DRIVES GROWTH

Given that top Dutch brands generally exhibit above-average Meaningfulness, what other attributes might distinguish top performers from the rest of the pack in this challenging year for brand value growth? In a word, Difference. This year, growing Dutch brands in the Top 30 had a strong average Difference score of 124, compared with average scores for flat and declining Dutch brands that hovered closer to the global mean of 100. High perceptions of Difference can be achieved by nurturing a number of brand attributes – including uniqueness, dynamism, leadership, and creativity. What’s clear is that brands need to establish their edge in at least one of these Difference-generating areas to thrive in today’s Netherlands.

4. INNOVATION IS AN IMPORTANT DIFFERENTIATOR

Analysis of all Dutch categories shows that perceptions of Innovation explain about 50 percent of a brand’s Difference score – and on top of this, Innovation is, of course, an important driver of brand value and health in its own right. Top Dutch brands scored an average of 106 for Innovation, a value that’s unchanged from 2019 and represents a middle-of-the-pack performance in the European context. How can this figure be improved? Disruption is one important pathway to Innovation – and certainly garners a lot of headlines. But improving consumers’ perceptions of a brand’s Creativity and Leadership – through better communication about existing brand initiatives, as well as new initiatives – can also help a brand rate as more Innovative.

5. PERSONALITY MATTERS

When it comes to driving brand value, perception matters just as much as reality – and one way to unite the two is to cultivate a more vivid brand personality. A brand could be doing everything right to innovate its processes and products – but if that brand’s consumer-facing personality is dull and unengaging, it likely won’t gain widespread recognition for these improvements. In addition to possessing high scores for Innovation and Difference, many of this year’s growing brands also scored well on perceptions of Creativity, Fun, and Playfulness. Personality should not be mistaken for contrived or inauthentic good cheer – rather, it’s about using clear, appealing brand assets to emphasize a brand’s other strengths in consumers’ minds.
CROSS CATEGORY TRENDS

1 BRACING FOR UNCERTAIN TIMES

Given the Netherlands’ high exposure to the global economy, brewing macroeconomic troubles could cast a pall over Dutch companies’ near and medium-term prospects. Challenges ahead might include escalating trade tensions, as well as the prospect of a global recession. The biggest potential obstacle is Brexit, and its possible effect on trade and labor flows throughout Europe. Proactive Dutch brands of all stripes should be drawing up contingency plans to address these challenges; it’s not at all unlikely that they will have to use them.

2 DUTCH VALUES STILL MATTER

At dawn of the 2010s, there were fears that Dutch brands would be crowded out by foreign corporate titans like Amazon and Aldi. In reality, local retailers like bol.com, Coolblue, and Albert Heijn have held strong by understanding local needs and upholding high Dutch standards of service. What’s more, many Dutch brands – including HEMA, thuisbezorgd.nl, Booking, Action, and the Netherlands’ many beer labels – have actually expanded outward to become even bigger world players. This success has been achieved not despite, but because of, these brands’ typically Dutch attributes like good value, smart design, and quirky humor.

3 CONSUMERS NEED REASSURANCE

Dutch consumer confidence began to decline precipitously in late 2018, and in 2019 it dipped into negative territory for the first time in four years. Though nowhere near the lows of 2013, Dutch consumers’ economic confidence and willingness to buy is clearly in a downward swoon. This is not yet a cause for brands to panic – it’s not as Dutch people will stop spending money overnight – but now is the time to double down on brand strengths, as well as revisit the strategies that worked best during previous gloomy spells. There are strong Dutch values around thrift, resourcefulness, and creativity under pressure that local brands can rely on in times when consumers seek reassurance.

4 INSTANT IS THE NEW QUICK

In search of convenience, security, and innovation, Dutch consumers have been especially eager to embrace new forms of quick payment. In 2018, cash accounted for only 37 percent of purchases and 59 percent of peer-to-peer transactions in the Netherlands. Dutch consumers embrace of contactless and digital transactions makes sense given the Netherlands’ continent-leading rates of internet and smartphone penetration, and is reflected in a growing passel of Dutch fintech startups led by the likes of Adyen. In 2019, transactions sped up even further after the country’s major banks rolled out a new Instant Payment standard that credits users’ accounts within seconds, no matter the time or date. Combine these developments with the news that bol.com has begun to offer 2-hour delivery in select parts of Amsterdam – a fulfillment standard that’s likely to spread given the Netherlands’ high population density – and “instant” is clearly becoming the new “quick” in the world of Dutch commerce. Going forward, there’s a real opportunity for brands to make the combination of high speed and high service into a hallmark of Dutch commerce.

5 TRUST IN TRANSPARENCY AND ACCOUNTABILITY

Amid media reports on corporate tax schemes, foreign corruption trials, money-laundering controls, executive pay, and “greenwashing,” Dutch brands and businesses are more scrutinized than ever. Going forward, they will need to take proactive steps to explain their intentions and guard their reputations. Social media has increased brands’ exposure to feedback from ordinary citizens, and increasing public debates on inequality and sustainability will necessarily invite comment from leading Dutch businesses. An increasingly global economy has given activist investors, regulators, and the press more influence than ever on boardroom operations. In this environment, transparency and self-accountability should not be a last resort or a means of damage control, but a preferred way of doing business.

6 COLLABORATION WINS

The nation of collaboration for success is more vital than ever in the Netherlands. The Dutch Top 30 is full of examples of brands linking up to seek mutual wins and enhance their global competitiveness. Consider, for instance, bol.com’s successful pivot to working with third-party sellers, as well as the brand’s tight integration with Albert Heijn grocery stores. Consider the way that banks have cooperated to seamlessly implement the new Instant Pay standard nationwide. And consider the very existence of one top Dutch brand, Sensea, as the fruit of a technical partnership between two others, Philips and Douwe Egberts. It turns out that the best way to compete may well be to collaborate.
TAKEAWAYS

1. **DON’T IGNORE RURAL CITIZENS**
   In late 2019 a series of protests by Dutch farmers brought attention to growing urban-rural divides, and the need to manage stakeholder tensions amid the transition to a more sustainable society. The so-called “tractor protests” (in which protesting farmers snarled urban commutes by driving their equipment into metro areas) were notable for the way that they challenged policies aimed at reducing livestock emissions, among other aspects of the sustainability agenda. Beyond the specific policy issues at play (the government has indicated it is willing to provide more compensation for farmers, while the protestors complain they are being scapegoated while the “real polluters” run free), the protests are a reminder that rural Netherlands remains a potent agricultural and political force. Politicians and business should not overlook the needs and concerns of these citizens in the coming decades.

2. **THERE’S A NEW RETIREMENT MATH**
   Recently, several major Dutch pension providers warned that they might have to cut their payouts due to insufficient funds in the face of historically low interest rates. While policy responses are being debated, the news is already reshaping how ordinary Dutch people think about spending and saving for the future. There is declining trust in social institutions like pensions, and a growing belief that people need to look out more for themselves. For the finance industry, new retirement math will likely result in increased consumer demand for long-term investment products. Beyond this, the wider effects of these pension scores on retail psychology is as yet uncertain. (Will people feel the need to sacrifice now in order to retire later?) But is likely to be profound.

3. **MANAGE CONCERNS ABOUT FAIR PLAY**
   Amid contentious debates over a planned 2021 corporate tax rate cut, notions of “fair play” have returned to the center of Dutch political life. Disclosures about whether and how major companies (Dutch and foreign) pay their taxes have gained significant traction in the Dutch media; look behind these discussions of “royalty payments” and tax deductions, and what’s emerging is a cultural consensus that all should contribute their “fair share” to Dutch society in challenging times. In this climate, brands that brandish this slogan about corporate responsibility while exposing themselves to withering media criticism face significant reputational risks. Conversely, those align themselves plainly with values of fairness and equity should fare much better.

4. **BEAT THE HEAT**
   It seems as if every summer now brings record-setting, “once in a generation” heat waves to Dutch cities. It may be time, then, to stop treating extreme heat as an emergency aberration, and start dealing with it as a new normal—a recurring challenge that’s ripe for disruptive solutions. Indeed, many in the Netherlands are wary of simply turning to air-conditioning when facing summer heat, as that technology typically comes with strong sustainability downsides. Instead, there’s room for a wide variety of brands and businesses—from industrial designers to home furnishers to beverage-makers—to innovate and educate around the subject of cooling off.

5. **REMIX ADULT LEISURE**
   Changes in technology, laws, and consumer taste have offered businesspeople new opportunities to innovate in two “adult” product categories that many associate with Dutch culture (frequently for the better, and sometimes for worse). In the alcohol industry, brands from Heineken on down have found success with new low- and zero-alcohol formats. At the same time, the business of providing marijuana and psychedelic substances—which scaled back considerably last decade as the Netherlands rejected “stoner tourism”—is being remade as a more innovative category as new chefs and wellness experts combine these materials with gourmet ingredients and “body-hacking” superfoods. Beer is about so much more than “getting drunk” these days, and psychedelics are about more than “getting high.” Given this, the prospects for remixing adult leisure seem bright.

6. **BET ON DIGITAL LOGISTICS**
   With its world-class seaports and airports, the Netherlands has long enjoyed a reputation as a major logistics hub. This is becoming increasingly true in the digital world, too—and while servicing these B2B aspects of the digital economy may lack the allure of more consumer-facing tech ventures, diversifying into the world of digital logistics holds significant value for the Dutch economy. Examples include the ways Philips has harnessed big data in its Innovation Services and Logistics businesses; Thor Equities’ plans to build and lease major e-commerce distribution centers in the Netherlands; and the work being done by fintech startups and major Dutch banks alike—on using technologies like AI and blockchain to simplify payments and invoicing.

7. **CELEBRATE NATIONAL PRIDE**
   This year the Netherlands will field strong teams at the Summer Olympics and the European Soccer Championships. These events have historically spurned feelings of national pride, and have offered brands the chance to tap in to feelings of patriotism through both official sponsorships and more informal tactics. In addition, this year the Netherlands is playing host to several Euro 2020 matches—and, just as excitingly, is staging the Eurovision song contest following Duncan Laurence’s win last year. What these hosting opportunities provide is a chance to define how the Netherlands presents itself to the world: should it be a new vision of Dutch culture? (Or both?) Should it be strong and serious, or cheeky and irreverent? (The latter seems likelier for the camp pageantry that is Eurovision.) One interesting development is that for the first time, the country has officially ended the practice of referring to itself as “Holland” during international events, opting instead for the more modern and geographically inclusive “Netherlands.” At core, the switch is about the Netherlands actively defining itself on its own terms, rather than being defined by outdated names (and clichés) held by others. It’s a sign that national pride can be rooted in forward-looking, contemporary values.

8. **MOVE BEYOND MEAT**
   As Dutch people report trying to eat less meat, a number of Dutch brands are moving to provide diners with alternative options. Some recent examples: Commercial agent VeganBox has worked with supermarkets like Jumbo and Albert Heijn to expand meat-free and vegan shelf space; frozen food brand Mora has collaborated with Dutch meatless brand The Vegetarian Butcher (recently acquired by Unilever) on a range of crave-able snacks; and Rabobank brought a “Braassee 2050” food future concept to the Lowlands festival, serving tasty meat alternatives like a “celeriac shawarma.” And then there’s Mosk Meat, the Maastricht-based startup at the forefront of lab-grown “clean meat.” Eat up!
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Top 30 Most Valuable Dutch Brands 2020

9 EMBRACE SOCIAL JUSTICE
Recent debates over the use of blackface in “Black Pete” celebrations have surfaced an important generational divide. While 68 percent of Dutch people surveyed in 2017 supported keeping the character in blackface, sentiment among young people trended in the opposite direction, with more than half of Dutch people between the ages of 18 and 25 opposing the practice. It’s a reminder that younger Dutch people are more eager to see “social justice” – not to mention multiculturalism and diversity – as essential facets of modern society.

10 EASE BURDENS AT WORK
According to Dutch government’s Central Bureau of Statistics, “more employees are reporting work-related mental fatigue... One out of six employees (17 percent) report this fatigue as occurring at least several times a month, up from 13 percent in 2015. The most commonly cited complaint is feeling drained at the end of a working day: 32 percent of employees suffer from this at least a few times a month. 20 percent get up in the morning feeling tired.” Similar proportions of employees report feeling significant information overload in the form of emails, phone calls, and social media messages. Brands and businesses have a role to play in alleviating this stress – both through the products and services they offer the population at large, as well as through the policies they offer their own employees.

11 LABOR IS IN DEMAND
Record low unemployment rates have led to high feelings of security for Dutch workers. According to official government statistics, people feel less worried than ever about losing their jobs, and more confident that they would be able to find new employment. Going forward, the high demand for workers could make employees feel more empowered to advocate for improvements like flexible hours, telecommuting, and mental health support. Employers, meanwhile, may start looking toward automation technologies to them cope with labor shortfalls.

12 EXPLORE BIOPHILIA
The Netherlands has long been at the forefront of creating sustainable, energy-efficient projects. The next step is biophilia: embracing and incorporating nature into all aspects of design. Projects like the Alliander business park in Duiven go beyond green roofs and solar panels to incorporate large windows, living walls, open breezeways, and ample vegetation throughout their floorplans, in order to truly bring the outside in. A leading global proponent of biophilia is the Dutch couturier Iris van Herpen, whose 3-D printed dresses are inspired by the hidden math of nature, and who recently made her architectural debut directing the renovation of the Naturalis Biodiversity Center in Leiden according to biophilic principles.

13 CONSIDER THE TRANSCENDENT
In 2019 the Central Bureau of Statistics reported that, “for the first time in history, a majority of the Dutch population [51 percent] had no religious denomination... Attendance of religious services, too, has declined over time.” But while official religion may be on the decline, people still desire community and yearn for transcendental experiences. Consider, for instance, the continued popularity of travel and camping, or the way music festivals and “fitness tribes” might fulfill some people’s need for communal rituals and rites of passage.

14 SUPPORT THE “NEW FRUGALITY”
When Martine Postma started the first Repair Café in Amsterdam in 2009, she helped to position the Netherlands at the forefront of a “New Frugality” trend that married typical Dutch thrift with modern concerns for sustainability. Today, that energy has spread to digital platforms as well, thanks to their algorithmic ability to match excess supply with demand (for goods and infrastructure capacity) so that nothing goes to waste. Marketplats, of course, is the legacy player in enabling Dutch people to buy used goods online (though it’s facing new competition in the fashion space from foreign resale platforms like Vinted and Micolet, which recently launched in the Netherlands). But also note the rise of platforms like Too Good To Go and Quicargo, which match users to suppliers in hopes of reducing food and shipping waste, respectively.

15 LEARN TODAY’S LOVE CODES
Love and romance – not to mention flirting, sex, and dating - will always be timeless themes in culture and in marketing. So here’s a statistic to consider when depicting courtship in today’s Netherlands: according to a 2019 survey by the Rutgers foundation, some 48 percent of Dutch people under the age of 24 have made a profile for an online dating site such as Tinder. (This is compared to a figure of 20 percent for the Netherlands’ overall adult population). Just as algorithms are increasingly determining people’s shopping lives, so, too, are they influencing the Dutch dating scene.
ECONOMY AND DEMOGRAPHICS

Land area: 33,893 sq. km
Population: 17.3 million

Household structure by number of occupants (2017):
- 1 person: 38.0%
- 2 people: 32.6%
- 3 people: 11.9%
- 4 people: 12.3%
- 5+ people: 5.2%

Average household size: 2.15 persons

Education Level Achieved, among people aged 25-64 years (2017):
- Finished primary or lower secondary school: 21.6%
- Finished secondary school or has a higher (non-degree) qualification: 41.2%
- Tertiary degree or comparable qualification: 31.2%

Unemployment rate: 3.5%
Average yearly income (2018): €28,800

Import Value: €442 billion
Export value: €495 billion

GDP: €771 billion (2018 est.)
GDP growth rate, 2018: 2.7%
GDP growth rate, year on year Q2 2019: 1.8%
GDP growth rate 2019 forecast: 1.8%

Unemployment rate: 3.5%
Average yearly income (2018): €28,800

Import Value: €442 billion
Export value: €495 billion

GDP - composition, by sector (2017)
- Agriculture 1.6%
- Industry 17.9%
- Services 70.2%

GDP Per capita 2017 (PPP): USD$53,600

Major import partners:
- Germany
- China
- UK
- Russia
- U.S.

Major export partners:
- Germany
- France
- China
- Belgium
- U.S.

Home Internet penetration: 98 percent (highest in EU)
Mobile subscriptions (per 100 people, 2017 est: 121)
- U.S. 122
- Italy 141
- Japan 153
- Germany 129
- Spain 113
- France 106
- China 105

Ease of doing business: 36 out of 190 markets

Sources: CBS NL, CIA World Factbook, OECD, Eurostat
Total Dutch ad spend is projected to reach €3.77 billion for 2019, up 4 percent from the year prior, according to figures from Kantar. In 2020 the figure should continue to rise another 4 percent, to €3.91. One reason these projections are notable is because they show advertising growth rates outpacing national GDP growth – a sign that the Dutch ad market remains strong even in challenging times. Another notable trend is the move towards digital: this category first captured the majority of all Dutch advertising spending in 2017, and is projected to rise to nearly 54 percent of all advertising in 2019 and 56 percent in 2020.

### Top 5 Websites Monthly reach in users (000s)

- **Google**: 13,301
- **facebook**: 11,256
- **bol.com**: 10,709
- **YouTube**: 9,102
- **Google Maps**: 7,948

### Top 5 Apps Monthly reach in users (000s)

- **Google**: 12,052
- **WhatsApp**: 11,078
- **YouTube**: 10,698
- **Google Maps**: 10,364
- **Facebook**: 9,807

### Top 5 Audio Streaming Sites Monthly reach in users (000s)

- **Spotify**: 1,693
- **Soundcloud**: 625
- **OMX Audio Streams**: 444
- **Kerkamroep**: 170
- **Sonos**: 128

### Advertising spend Total amount in 2019 (€Mil):
- €3.772 Mil.
- +4% from 2018

### Gross Media Spending per Category (2018 in €Mil)

- Retail: 108.0
- Food: 102.0
- Hospitality, Travel, and Leisure: 77.0
- Transport: 62.8
- Media: 51.9
- Financial Services: 50.8
- Personal Care: 49.5
- Consumer Durables: 44.9
- Building, Real Estate: 14.8
- Professional Products: 11.2
- Agricultural: 11.2
- Farming: 10.0
- Home Appliances/Consumer Electronics: 9.8
- Automotive: 7.0
- Professional Services: 6.3
- Medical: 4.5
- Retailers: 4.5
- Foodservice: 3.5
- Detergents: 3.4
- Building, Real Estate: 3.3
- Professional Products: 3.2
- Agriculture: 2.4
- Home Appliances: 2.0
- Consumer Electronics: 2.0
- Medical: 1.9
- Retailers: 1.9
- Foodservice: 1.9
- Detergents: 1.8

### Adult Media Usage Daily Time spent in minutes

- Online PC/Laptop/Tablet: 174.3
- TV: 145.6
- Online on Mobile: 123.4
- Radio: 116.6
- Social: 81.7

Music streaming: 53.5
Games: 40.3
Watching online: 46.3
TV/streaming: 41.0
ENERGY, BANKS AND BEER BRANDS LEAD NETHERLANDS IN CATEGORY VALUE

The value of the BrandZ™ Top 30 Most Valuable Dutch Brands remains concentrated at the top of the ranking, with the number one brand, Royal Dutch Shell, accounting for more than one-fifth of the brand value of the entire Top 30.

<table>
<thead>
<tr>
<th>BRAND</th>
<th>BRAND VALUE 2020 (USD MIL)</th>
<th>% BRAND VALUE CHANGE (2019-20)</th>
<th>% OF VALUE OF THE TOP 30 DUTCH BRANDS 2020</th>
</tr>
</thead>
<tbody>
<tr>
<td>Shell</td>
<td>19,016</td>
<td>-7.9%</td>
<td>21%</td>
</tr>
<tr>
<td>Heineken</td>
<td>12,594</td>
<td>6.0%</td>
<td>14%</td>
</tr>
<tr>
<td>Booking.com</td>
<td>12,199</td>
<td>2.8%</td>
<td>13%</td>
</tr>
<tr>
<td>ING</td>
<td>10,965</td>
<td>2.3%</td>
<td>12%</td>
</tr>
<tr>
<td></td>
<td>8,729</td>
<td>-18.6%</td>
<td>9%</td>
</tr>
</tbody>
</table>

The top three brands in the Dutch ranking – Royal Dutch Shell, Heineken, and Booking.com – account for nearly half of the total brand value of the Top 30. The Netherlands’ top 10 brands account for a higher percentage of value of the national Top 30 – some 86 percent – than any other ranked BrandZ™ country. Given this, changes in just two or three brands can have a major impact on the year-to-year value of the Dutch Top 30.

In this second edition of the BrandZ™ Dutch Top 30, it is now possible to examine year-on-year trends in category value. Retail was the biggest riser in terms of year-on-year percentage change, growing 53% in value in 2020 on the strength of two new retail brands entering this year’s list, as well as positive year-on-year growth for all five returning retail. Online food delivery grew 52 percent year-to-year on the strength of its sole category occupant, thuisbezorgd.nl.

Similarly, Energy fell by 8 percent thanks to a brand value decline of the same amount by its sole category occupant, Royal Dutch Shell. Insurance brands, meanwhile, declined in value by 10 percent due to a challenging year for Aegon. Banks declined overall by 16 percent overall, representing the largest category decrease in total dollar value in year’s Dutch rankings. Lastly, the Food category – which this year consists of a single brand, Honig – declined 25 percent. All other categories showed positive year-on-year value growth.

Energy, Banks, and Beer were the most valuable brand categories in the Netherlands, followed by Travel Services, Technology, and Telecom Providers. Beer once again placed an impressive six brands in the Dutch Top 30.

Retail, the seventh largest category by total value, held the distinction this year of placing the largest number of brands in the BrandZ™ Top 30 Most Valuable Dutch Brands 2020 ranking. This category was led by global convenience store chain Spar at #10, followed by discount homeware retailer Action, which jumped the largest number of places of any brand this year, up from #17 in 2019. Grocery giant Albert Heijn was the next most valuable retail brand at #15, followed by the ranking’s two newcomers, Coolblue and Bol.com, at #16 and #18, respectively. Rounding out the retail pack were proudly quirky grocery chain Jumbo at #20 and playful discount retailer HEMA at #23.

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STRONG BRANDS SURVIVE AND THRIVE

Strong brands do far more than win media plaudits and climb rankings such as this one. The value of a brand has a clear, measurable link with the share price of the company behind it.

Over the 13 years in which we have been tracking the BrandZ™ Top 100 Most Valuable Global Brands, the companies behind the top-ranking brands have far outperformed stock market benchmarks. The value of the BrandZ™ Strong Brands Portfolio – a subset of the Top 100 that best exemplifies the building blocks of smart branding – has increased 196 percent between April 2006 and April 2019, outperforming both the S&P 500 and the MSCI World Index. (The MSCI World Index is a weighted index of global stocks.)

What that means is that $100 invested in 2006 would be worth $159 based on the MSCI World Index growth rate, and $228 based on the S&P 500 growth rate. But that $100 invested in the BrandZ™ Strong Brand Portfolio would be worth almost $300.

In difficult economic times, having a strong brand does not make a brand impervious to business pressures, but it can help lessen their impact. In 2008-2009, the most valuable brands in the world took a hit due to the global economic downturn, but their value was somewhat protected. Their value did not fall by the same extent as other brands, and their recovery came more quickly as conditions improved.

And in the Netherlands, strong Dutch brands outperformed the AEX in the short term by 28 percent over the past year.

Strong Dutch brands are outperforming the AEX in the short term by 28%
A DIVERSE SET OF BRANDS RISE IN VALUE

Although the overall value of the BrandZ™ Top 30 Dutch brands declined by a slight 1 percent this year, that headline figure masks wide swings in how brands fared during this second year of the rankings. Seven returning brands grew their brand value by more than 5 percent, 11 were essentially flat, and ten declined in brand value by more than 5 percent.

A volatile environment for brands

This year’s top risers were no flukes. Instead, the data shows that growing Dutch brands scored significantly higher on measures of Meaningfulness, Difference, and Salience than flat and declining brands. The core tenets of building strong, growing brands still very much apply in challenging years – just as much, if not more, than in boom times.

Leading the pack among top risers was retailer Action, which rose from #17 to #13 on this year’s Dutch Top 30. In part, Action’s ascent was fueled by strong financial growth, the result of an expansion strategy that saw the chain open 230 new stores in 2018 across markets like France, Germany, and the Netherlands. The Action brand itself is also strong, notching well above-average Meaningful, Different, and Salient scores. In particular, Action has used its reputation for Innovation (as seen in an ever-changing assortment of new products at unbeatable prices) to bring in repeat customers.

Action scores well on all aspects of brand power

<table>
<thead>
<tr>
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<th>BRAND VALUE 2020 (USD MIL)</th>
<th>% BRAND VALUE CHANGE (2019-20)</th>
</tr>
</thead>
<tbody>
<tr>
<td>ACTION</td>
<td>1,123</td>
<td>122.4%</td>
</tr>
<tr>
<td>Thuisbezorgd</td>
<td>1,592</td>
<td>52.2%</td>
</tr>
<tr>
<td>KPN</td>
<td>4,573</td>
<td>11.0%</td>
</tr>
<tr>
<td>Nestlé</td>
<td>774</td>
<td>10.2%</td>
</tr>
<tr>
<td>Heineken</td>
<td>319</td>
<td>7.7%</td>
</tr>
</tbody>
</table>
Top 30 Most Valuable Dutch Brands 2020

Challenges and Opportunities in Major Dutch Industries

Banking and retail are two of the most prominent categories in the BrandZ™ Dutch Top 30. Although they fared quite differently in this year’s rankings, both will remain crucial to the Netherlands’ economy in the decade to come.

Banks Draw on Core Strengths in Challenging Times

Dutch banks declined by 16 percent overall in 2020, representing the largest category decline in this year’s rankings in total dollar value. Last year banks made up 20 percent of the total value of the Netherlands’ top brands; this year, their share fell to 17 percent.

Banking Category: Average Brand Value % Change YoY

<table>
<thead>
<tr>
<th>Global</th>
<th>Netherlands</th>
<th>Italy</th>
<th>France</th>
<th>UK</th>
<th>Germany</th>
</tr>
</thead>
<tbody>
<tr>
<td>-10</td>
<td>-16</td>
<td>-12</td>
<td>-9</td>
<td>-7</td>
<td>-1</td>
</tr>
</tbody>
</table>

In many ways, these declines should come as no surprise, as it’s been a challenging year for banks around the world. The total value of the global and European banking sectors also fell significantly in this year’s BrandZ™ analysis. In part, this result can be attributed to major macroeconomic issues like U.S.-China trade conflict and Brexit, among other potential global recessionary trends.

But even in this context, a 16 percent decline for Dutch banks stands out as greater than those experienced by their counterparts in Italy, France, the UK, and Germany. This past year has undoubtedly seen a challenging climate for Dutch banks, as falling interest rates and a decline in mortgage lending – as well as court cases surrounding money laundering and other financial controls – have hurt their financial performance.

Despite the overall drop in value, however, the top Dutch banks still retain high scores for meaning and salience. This suggests that the condition of Dutch banks today is different than the situation in 2013 and 2014, when a financial collapse coincided with widespread loss of consumer trust in banks. In response to that earlier crisis, many Dutch banks pledged to become more “boring” and launched partially successful campaigns to win back the public’s favor.

One representative example for the banking sector is ING, which despite earnings challenges has stabilized its perceptions of Meaningful, Different, and Salience since 2015. ING has also strengthened its performance in the areas of Brand Purpose, Innovation, Communications, Brand Experience, and Love – the five aspects that make up the BrandZ™ metric for brand health and vitality, also known as vQ.

Strong brand health correlates highly with Meaningful Difference, and brands with high vQ scores are also more likely described as trustworthy, “in control,” desirable, creative, and friendly. They under-index on negative brand personality traits such as being uncaring or arrogant. On average, top banks in the Netherlands (i.e., those in this year’s BrandZ™ Dutch Top 30) actually improved their average performance in the vQ components of Love, Brand Experience, and Communications in 2020, and their Purpose scores also remained relatively strong compared to the global average for all brands analyzed by BrandZ™.

One area for improvement for Dutch banks is Innovation, where the category average hovers near 100 (which represents a “just ok” result). The case for boosting innovation in the financial sector isn’t a merely statistical or theoretical one: in today’s challenging market, many Dutch banks are already betting that innovations in blockchain and fintech can help them to offset earnings challenges elsewhere in their business.

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DUTCH RETAIL GROWS IN PROMINENCE AND VALUE

The Netherlands’ retail sector, meanwhile, placed a leading seven brands in this year’s Dutch Top 30. It also notched the highest category growth rate, increasing by 53 percent over the previous year.

A big factor in this rise was the entry of two new retail brands to the Dutch Top 30: bol.com and Coolblue. And while both brands perform above average on measures of Meaningfulness and Difference, their divergent strategies point to some of the biggest trends in Dutch retail today.

Bol.com is a superb generalist retailer. Founded 20 years ago as an online bookseller, today bol.com is the Netherlands’ leading webshop across dozens of categories. The shop’s generalist ethos is emphasized by its tagline: “The store of us all,” a slogan that implies accessibility for everything and for everyone. In recent years, Bol.com’s decision to open up as a third-party platform for thousands of online stores has only further cemented it as a cornerstone of the Netherlands’ e-commerce universe, as has its recent experiments with two-hour delivery times.

Founded around the same time as bol.com, Coolblue has grown to become a service-minded specialist retailer in the areas of electronics and white goods. Their “go for it” friendly mentality is well-represented by the company’s slogan of “Anything for a smile.” Among its loyal fans, Coolblue is known for its focus on going above and beyond the standards of typical e-commerce customer service – for instance by offering free delivery, installation, testing, and recycling for its white goods products. Coolblue’s history as a niche retailer operating in just a few categories means that it still has room to grow its Salience scores (and attendant sales) in years to come.

Both new entrants perform above category average in terms of Meaningful Difference.

For Bol.com their Meaningfulness is mainly derived from perceived superiority, modernity and ease of use.

For Coolblue its heritage in electronic appliances, and is now also selling other products. However, its heritage seems to limit the brand in terms of salience within the wider category, as it is still seen as a specialist brand.

Other attributes that set Dutch retail brands apart are exceptional value, smart design, innovation, and quirky personality. Home goods retailer Action, for instance, is the top riser in this year’s ranking. This is partly due to Action’s recent store expansion throughout Europe. But underlying Action’s expansion is consumer response to the brand’s low prices and high-quality products – as well as an innovative merchandising strategy that sees new products constantly rotating through Action’s stores, the better to encourage repeat customer visits. Other Dutch retail brands have distinguished themselves through quirky yet appealing product offerings (HEMA) and customer service philosophies (Jumbo), as well as a focus on innovation (for example, Albert Heijn’s delivery integration with corporate sibling bol.com) and a willingness to embrace new formats (SPAR).
Top 30 Most Valuable Dutch Brands 2020

DEFINING DIFFERENCE

While top Dutch brands lead Europe in attributes like Meaning and Salience, they fall to the middle of the pack for Difference, with an unexceptional average score of 106 – a value that, in fact, decreased by two points from 2019 to 2020. Brands as varied as Thuisbezorgd.nl, Albert Heijn, Heineken, and ING also saw declining individual Difference scores this year.

Why does all this matter? In addition to its role as a driver for overall brand value, Difference is especially important in the Netherlands for convincing consumers to pay more for a brand’s offerings. Statistical analysis shows that Difference drives some 44 percent of Dutch brands’ Premium scores, comparable to the figure of 47 percent for Meaningful, and well above the importance of Salience.

It’s no surprise, then, that the Netherlands’ Top Risers this year scored an average of 19 points higher than flat or declining brands on “Distinctive appearance,” and 17 points higher on “Shaking things up” – both are components of brands’ overall Difference scores.

But what does it mean for a brand to truly stand out as Different? For starters, focus on Innovation. Analysis of all Dutch categories shows that Innovation explains about 50% of a brand’s Difference score (and is especially tied to how Dynamic a brand seems).

It makes sense, then, that just as top Dutch brands’ Difference scores tend to lag behind their Meaningful and Salient scores, so too does the Top 30’s average Innovation score lag behind the other aspects of brand health (vQ).

<table>
<thead>
<tr>
<th>Average</th>
<th>Purpose</th>
<th>Innovation</th>
<th>Communications</th>
<th>Brand Experience</th>
<th>Love</th>
<th>vQ</th>
</tr>
</thead>
<tbody>
<tr>
<td>113</td>
<td>106</td>
<td>111</td>
<td>109</td>
<td>111</td>
<td>110</td>
<td>vQ</td>
</tr>
</tbody>
</table>

Importance to driving Premium

SALIENCE 9%

MEANINGFUL 47%

DIFFERENT 44%

Dutch Top 30 2020 Vitality Quotient

R² = 0.49
The obvious next question is how can Dutch brands improve their Innovation scores? One avenue is Disruption – as measured by consumer perceptions of how much a brand is “shaking things up.” The challenge with disruption, of course, is that today’s disruptive breakthrough is tomorrow’s new normal; these days, leaders need to keep finding ways to sustain their disruption.

It’s therefore worth noting that disruption is just one component of how BrandZ™ tracks Innovation. Creativity and Leadership are just as crucial to determining whether a brand stands out as innovative in consumers’ eyes. Because of this wider definition, Innovation is hardly the sole preserve of technology brands. Any brand that is seen as doing something new, or setting trends for their category, will get talked about and tried.

Nor is Innovation just about introducing new products. Sometimes it simply means improving brand communications – that is, investing more in advertising to communicate what is already unique and exciting about a brand. Innovation can also mean increasing flexibility and nimbleness. This could mean finding new ways to deliver existing products in more convenient formats, or for radically better prices.

LEVERAGE BRAND ASSETS

All that being said, Innovation is only part of the Difference picture. Brands can also cultivate difference through their commitments to service, value, heritage, and a host of other factors. Indeed, the story of Difference is in many ways a story about smartly leveraging brand assets: i.e., those logos, packaging, colorways, characters, slogans, designs, and more that set brands apart in consumers’ eyes. (To learn more about brand assets, see Erzi Eleveld’s Thought Leadership piece on the subject elsewhere in this report.)

Personality can also play a big role in driving Difference – and by extension, brand value. This year’s Top Risers, for instance, had higher average scores in aspects like Fun, Creativity, and Playfulness than flat and declining brands. Consider the ways that many Dutch brands use quirky designs and activations to stand out in a competitive landscape: from brewer Bavaria’s ambush marketing schemes, to Hema’s colorful product arrays, Dutch brands can and should bet on Difference as they plan for future growth.
02 Thought Leadership
THE ULTIMATE BALANCING ACT: SHORT-TERM AND LONG-TERM RESULTS

We know more about the results of our marketing efforts than ever before. For a few years now, all marketers have daily access to sales figures, search, social, online clicks, and lots of other data. We no longer “just have to follow our intuition,” we can measure each and every one of our actions now. We of course had to get used to working like this after ages of just listening to our gut feelings, but you would think we had gained enough experience by now. We as marketers should be at the top of our games now, busy accomplishing effective growth.

But nothing could be further from the truth. The role of marketing is under pressure in a lot of organizations. The most important issue: Return on Investment (ROI). That is where the problem lies. Our worldwide BrandZ™ database shows that only a few brands are growing – so our marketing activities don’t seem to be leading to structural growth. Yes, every year BrandZ™ reports on brands that are moving up the ranks in value. But how many brands can keep this up for years upon years? Not that many. My colleague Nigel Hollis examined this thoroughly and found out that only 1 percent of all brands achieve sustained long-term structural growth. If you leave out the disruptors and tech firms, almost no brands remain.

Most brands have started working with more agility in the last couple of years, so that they can more easily adjust to the demands of the ever-changing world in which they run their business. The growing use of data has made it easier to measure the results of our actions. But we are still inclined to act upon short-term hypotheses, since short-term data results the easiest to measure. Long-term effects are much more difficult to prove. As a result of this, we are all working on our own short-term goals in our own silos, losing sight of the long term.

How often do the people who develop the brand promise in your organization talk to their Customer Experience colleagues? How many employees work in ways that reinforce your campaign? Is there anyone within your company who watches over brand consistency?

My plea? Keep an developing fact-based marketing. But please, give just as much weight to the long-term as to short-term decisions. And ask yourself: do you have the right data and the right prediction models to do this?

WHAT MAKES IT SO DIFFICULT?

It’s all about the balance, so it seems. Nigel’s analyses show that those brands that are growing know how to supplement the right customer experience with exposure and activation. There’s nothing new to this, but it is very difficult to do it in such a way that it helps you to build your brand and grow in a structured way. Long-term investing in your brand does pay off, though. To get the ROI discussion going, Nigel found some inspiring growth figures and principles for growth*. All your marketing activities have to reinforce each other. You must be consistent in everything you do – not only during a campaign or this one quarter, but over the years.

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BRAM VAN SCHAIK
CEO INSIGHTS DIVISION
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Kantar is the world’s leading data, insights and consulting company. We understand more about how people think, feel, shop, share, vote and view than anyone else.
NOW IS THE TIME FOR CMO’S

Big news for the world population – and for CMOs, specifically – appeared on the front page of the Dutch Financial Times on August 19th 2019. The release of a new agreement, the Statement on the Purpose of a Corporation, was announced, and came signed by 181 U.S.-based CEOs, amongst them the heads of Amazon, Apple, Coca-Cola, General Motors, and Procter & Gamble; even corporate banking giant Goldman Sachs signed up.

In the statement, the CEOs committed to leading their companies for the benefit of all stakeholders – customers, employees, suppliers, communities, and shareholders. Before this, most all collective statements of this kind since 1997 had endorsed principles of shareholder primacy – in other words, that corporations existed principally to serve shareholders.

With the new statement, these major companies committed to five principles. First, delivering value to customers and leading the way in meeting or exceeding customer expectations. Next, investing in employees, which starts with compensating them fairly and providing important benefits, as well as supporting them through training and education that helps them develop new skills for a rapidly changing world. Third, dealing fairly and ethically with suppliers and serving them as good partners. Fourth, supporting and respecting the people in communities, and protecting the environment by embracing sustainable practices across businesses. And last but not least, generating long-term value for shareholders, who provide the capital that allows companies to invest, grow, and innovate.

The new statement was received with hope and cynicism across a wide spectrum of involved stakeholders. A group of more than 30 American business leaders, including the heads of outdoor clothing brand Patagonia, The Body Shop owner Natura, Ben & Jerry’s (a part of Unilever), and Danone’s U.S. business, took the extraordinary step buying a full-page ad in the Sunday New York Times to champion what they say is an even more ethical way of doing business and “putting planet before profits.” The advert was aimed at members of the earlier group of 181 CEOs.

We will just have to see over time whether the cynicism or hope will be right. However, now that these statements are out there, the momentum is right for CMOs to talk with their CEOs about a more balanced way of generating value, especially in the long term. The outcomes of the second annual BrandZ™ Netherlands report can be of great value in that discussion, as BrandZ™ is one of the strongest measures of the long-term value marketers can create.

Upon the opening of the WPP Campus on April 2nd of this year, we launched the outcome of the research done by the Initiative for Real Growth. Having interviewed CMOs and CEOs all over the globe (including a good number in the Netherlands) we now have available a benchmark of what the best-in-class brands are doing to drive sustainable, top-line growth. Mark Read, our WPP CEO, has warned that Chief Marketing Officers have become “too much” like Chief Communications Officers, because they have been focusing on communications and forgetting the importance of the wider marketing strategy. And that is where it starts: bringing the word “market” back into marketing. It is very hard to find growth within current market definitions. Boundaries are disappearing, and breaking the rules and definitions of your industry now seems to be a requirement to find growth. Broadening horizons and approaching your market share in a different way – defining it differently – is what overperformers do.

The discussion of “shortism” has become increasingly prominent in recent years; many see that there’s been a loss of balance between long-term and short-term thinking, with a growing pressure to focus more on short term results. The issue is that for most brands, this short-term thinking doesn’t seem to lead to much financial value creation at all, let alone more balanced value creation. As a result, sustainable top-line growth is the number one issue on marketers’ minds. It’s time for a big reset for marketing. The time is right. The only question is: just how to do it?

The key word in “creating value” is “creating.” Yes, data-driven insights, smart strategic thinking, organizational strength, and a focus on delivering brilliant execution are all essential. However, if there is one thing that embodies “creating” more than anything, it is creativity. There’s no denying the strong positive relation between creativity and higher value creation when focused on the long term. And with 181 of the world’s largest companies focusing on delivering sustainable value for all stakeholders and on generating long-term value, creativity creates a massive opportunity for CMOs to show what they are worth. Now is the time.
Data is hot. It’s arguably at the top of the agenda at most brands and agencies, where not a day goes by without a fresh point of view or provocative take on the subject. Why? Because data seemingly arms members of adland with the power to create advertising and content that is profoundly relevant, personal, and efficient. But has it really? There’s certainly plenty of people willing to talk the talk, but I see very few actually walking…

So what’s holding us back from creating more profound, data-informed work? I’d contend that many marketing professionals have a misplaced focus on actively “engaged” user data (e.g., website statistics) and the media metrics that often accompany these findings. In other words, we’re too busy concentrating on gathering learnings on the already interested few, as opposed to the critical mass who aren’t yet interested in our brand, product, or service. This results in briefs lacking genuine insights into people’s lives that can really drive progress. To stimulate interest and growth, brands have to go beyond what they are eager to tell, and consider what the people actually want to hear.

To arrive at real actionable insights that can lead to outstanding creativity, it is therefore imperative to conduct a proper diagnosis of a brand – a diagnosis that is informed by data that goes beyond existing online metrics. As a starting point, we should at least be talking to broader groups of people within a market segment via focus groups or in-home interviews. We also shouldn’t neglect the value of observing people in their natural habitat, whether that be by conducting “shop-alongs” or doing thorough sentiment analysis.

Of course there is also undeniable importance in understanding the behavior and key drivers for current users – but perhaps this is best understood via specific loyalist research studies or one-to-one conversations as opposed to just media engagement. Finally, we shouldn’t ignore Brand Trackers and how the masses interpret a brand. Do they know it exists? Can they name it spontaneously? And if so, what associations do they have of it? And how does this compare the competition?

The point I’m making is not to ignore media engagement data. Rather, I’m advocating for thorough diagnosis that is informed by more “traditional” tactics, in conjunction with new and evolving data metrics. This will be far more powerful than just relying on the latter. To talk to people in the right way, we need to make more of an effort to truly understand the collective whole rather than the active few. This ultimately leads to stronger creative work and more effective contact strategies.

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Mindshare was born in Asia in 1997, a WPP start up with a desire to change the media world.
WHERE IS THE YOUTH LEADING US?

Greta Thunberg may be an exceptional girl – someone who by the age of eight had already wondered why everyone wasn’t more worried about global warming. Yet she symbolizes a great trend and a new era in which young people are becoming leaders with an enormous impact on older generations. After all, Greta is not the only teenager who has decided to stop eating meat and avoid air travel. And even Greta’s influence started closer to home, with parents who more or less made the switch toward environmentalism alongside their daughter. How many of us can relate in our own families? We are increasingly being confronted by our adolescents about flying to France and eating animals. Many of us have heard from our kids that our next car, “will surely be an electric one, right Mom?”

The adolescent of today makes quite his own choices, not only about goods but also about life views and style. Moreover, they are steadfast in that respect, and do not hesitate to address the older generations seriously about the irresponsible behavior that’s passed from generation to generation.

Dutch youth are often seen as the healthiest in the world. Yet that perception is not entirely justified. Health is often confused with a population’s “degree of satisfaction,” on which the Netherlands does score highly. In contrast, the HBSC (health behavior in school-aged children) measurements show that the Netherlands, compared to other European countries, only scores around average when it comes to issues such as exercise, nutrition, and alcohol consumption.

It is even expected that in the near future, half of today’s young people will have a chronic disease. But now we seem to be at a turning point. The legion of young people who strive for a more sustainable and healthier life is continually growing – and is starting to gain more and more influence. This is welcomed by various health organizations. They are increasingly joining forces with young activists to keep this target group away from cigarettes as well as fatty and sweet snacks – and, above all, to entice them to exercise a lot and opt for healthy products.

If it is up to cooperating health funds, Dutch youth by 2040 will be the healthiest in the world. This is a laudable pursuit, not to mention a very necessary one from an economic perspective. Healthcare costs are rising, which has necessarily also led to increasing strains on healthcare quality. Recent research shows that the affordability of healthcare is currently the most important issue for Dutch people, followed by quality of healthcare. The environment and sustainability are among the 10th place concerns among Dutch adults – not surprising, as adults seem to be much more skeptical about sustainability than their offspring. (Which, in turn, is another reason why the Earth has to depend more on the younger generation to secure its future.)

But what does all of this mean for companies? Young customers can no longer be won through their parents – especially this growing target group of socially conscious consumers. These young people make their own choices. As a makeup brand you have not automatically won the daughter for your business if the mother is a loyal customer. In fact, the direction of influence may run in the opposite direction: daughter knows how to persuade her mother to switch to another brand because it is free from animal testing, uses less plastic, and obtains raw materials more fairly. Brands therefore have to continuously put more effort and work in order to gain loyalty.

In addition, young people grow up with the idea that shared services are normal. Ownership is less important. Examples include sharing cars as well as neighborhood initiatives to share things. The same applies to reuse: these days you can hardly run a decent community center without including a repair café.

Consumers expect greater responsibility from companies and increasingly base their choices for brands on this expectation. As a brand, you must be sustainable and relevant. And above all, you must be “real.” Consumers, and especially young people, can poke through the façade and make mincemeat of “real.”

Examples include sharing cars as well as neighborhood initiatives to share things. The same applies to reuse: these days you can hardly run a decent community center without including a repair café.

Consumers expect greater responsibility from companies and increasingly base their choices for brands on this expectation. As a brand, you must be sustainable and relevant. And above all, you must be “real.” Consumers, and especially young people, can poke through the façade and make mincemeat of you if you are not sincere. Through social media they quickly reach many fellow youths and their opinion is easily shared.

This not only applies to your products or services, but also to your image as an employer. Traditional companies that are slow to transition to more sustainable and socially relevant policies have more difficulty attracting talented young people. The message is clear: you must have an eye and ear for your role in an environment and the impact you have on people and the environment.

The Gretas of today will soon make their way to the top of the business world. That will give a further boost to the way companies operate sustainably. Today, travel bans are most typically announced for financial reasons, but in the future they will be more a standard tool to ensure that people travel as little as possible on carbon-intensive routes. And that is just one small example.

If you want to stay connected as a company with your young target group, make sure you know your place in the world. And propagate this in your own, authentic way. Then you have the future.

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KANTAR
Kantar is the world’s leading data, insights and consulting company. We understand more about how people think, feel, shop, share, vote and view than anyone else.
THE LIMITS AND OPPORTUNITIES IN REGARDS TO IN-HOUSING CREATIVITY

A recent IAB Europe report confirmed that the in-housing trend has advanced rapidly in the European marketing world: over 86 percent of programmatic-savvy brands have some in-house ability, with 39 percent of them in-housing all of their marketing activities. A 2018 report from ANA in the U.S. revealed similarly high numbers, thus confirming that the trend of in-housing marketing activities is here to stay across the globe.

What is driving this in-housing trend? For one thing, brands feel an ever-growing need to control the data they collect on their consumers. In many ways, this leads to a “self-fulfilling development” of in-housing activities: the more first-party data that brands collect, the more they seek to control their online marketing platforms – which leads to more data collection, and so on... This need is catered to by platforms such as Google, Facebook, and Amazon, as well as technology stacks such as Salesforce and Adobe.

Consequently, brands are more aware than ever of the wide variety of content they need to produce across media channels. Companies need an overarching brand narrative that is recognizable both in an on and offline context – and especially need to ensure they maintain a sense of brand differentiation and distinctiveness, as these elements are widely considered to be essential drivers of brand value. Creativity is key to building these drivers, which is why the question of whether creativity can be effectively in-housed remains one of biggest open questions in the marketing world today.

Certainly from a sheer volume perspective, there is more need for creative work than ever before. The decline in linear TV viewership across most Western societies means that it is no longer sufficient to create one TV campaign and a few key visuals. In order to maximize reach to their target audience, brands must develop specific creative assets across a wide variety of channels where the audience spends its time – those places, in other words, where brands can best drive user conversion and engagement. At the same time, this proliferation of distinct content channels has stretched brands’ available budgets for content creation. This financial strain, in addition to a desire for more control, is what leads to the pressure to move marketing in-house. Indeed, the ANA survey confirms this assumption: “When asked to identify a single primary benefit of having an in-house agency, cost efficiencies were top ranked by a wide margin.”

The next question, then, which marketing capabilities are most likely to be in-housed by a given brand, and which are most likely to be outsourced? We believe that the chart below illustrates a logical progression of capabilities along this continuum – with commercial ownership and data ownership most likely to be in-Housed, and creative production and third-party tech positioned more towards the outsourcing end of the scale.

Although we believe there are in-housing opportunities for brands along this full continuum, there is also an ever-increasing need for third-party involvement in certain aspects of brand management. This is especially the case for marketing capabilities that involve creativity. Fairly recent examples of controversial in-house creative work for Dove (namely, an Instagram video that seemed to suggest light skin was better than dark) and Pepsi (the Kendall Jenner “protest” ad) resulted in PR disasters that illustrate the need for strong creative leadership, as well as the value of an outside perspective from a partner agency.

Therefore, we think it is important to consider the consequences of in-housing on the future of creative content development at brands and agencies. This is especially true given the following statement from the aforementioned ANA report: “Over the past three years, 70 percent of respondents have moved some established business that used to be handled by their external agencies to their in-house agency. Top services moved have been content marketing, social media, and influencer marketing.”

While in-housing creative production offers a higher sense of control, the long-term effects of this trend on brand value are difficult to predict. Often, brands will not consider their in-house creative production capabilities to be a core business activity, which results in a lack of overview and management. Confusions around scope, process, and expectations can result in unwanted complexity. In-house creative products should have well-defined scope of work, as well as a single point of oversight and management to avoid an overload in requests – but this is not always the case in practice.

In conclusion, while brands will continue to in-house certain marketing activities, they should not overlook the value of expertise and help from outside partners. Chiefly, it is imperative to safeguard creativity: and the only way to do this, is to have constant access to talent - talent that is hard to attract and retain outside the stimulating creative environment of an agency.

Brands that do pursue in-housing should choose their support partners wisely. For while there are dozens of agencies specializing in in-housing and in-sourcing certain skills, the level of talent brands can attract to these efforts is directly linked to the opportunities available for that talent to learn, develop, and grow across categories and brands.

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Hogarth is a marketing implementation agency. We produce advertising and other marketing communications for our clients across all media and all languages.
03
Top 30 Brands
## 2020 TOP 30 MOST VALUABLE DUTCH BRANDS

<table>
<thead>
<tr>
<th>RANK</th>
<th>BRAND</th>
<th>CATEGORY</th>
<th>BRAND VALUE 2020 (USD MIL)</th>
<th>BRAND VALUE 2019 (USD MIL)</th>
<th>% BRAND VALUE CHANGE (2019-20)</th>
<th>BC INDEX 2020</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Royal Dutch Shell</td>
<td>Energy</td>
<td>19,016</td>
<td>20,656</td>
<td>-7.9%</td>
<td>1</td>
</tr>
<tr>
<td>2</td>
<td>Heineken</td>
<td>Beer</td>
<td>12,594</td>
<td>11,883</td>
<td>6.0%</td>
<td>5</td>
</tr>
<tr>
<td>3</td>
<td>Booking.com</td>
<td>Travel Services</td>
<td>12,199</td>
<td>11,866</td>
<td>2.8%</td>
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<tr>
<td>4</td>
<td>Philips</td>
<td>Technology</td>
<td>10,965</td>
<td>10,714</td>
<td>2.3%</td>
<td>3</td>
</tr>
<tr>
<td>5</td>
<td>ING</td>
<td>Banks</td>
<td>8,729</td>
<td>10,727</td>
<td>-18.6%</td>
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<tr>
<td>6</td>
<td>KPN</td>
<td>Telecom Providers</td>
<td>4,573</td>
<td>4,121</td>
<td>11.0%</td>
<td>3</td>
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<tr>
<td>7</td>
<td>Rabobank</td>
<td>Banks</td>
<td>3,920</td>
<td>4,099</td>
<td>-4.4%</td>
<td>3</td>
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<tr>
<td>8</td>
<td>ABN AMRO</td>
<td>Banks</td>
<td>2,793</td>
<td>3,394</td>
<td>-17.7%</td>
<td>3</td>
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<td>9</td>
<td>Ziggo</td>
<td>Telecom Providers</td>
<td>2,575</td>
<td>2,714</td>
<td>-5.1%</td>
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<tr>
<td>10</td>
<td>Spar</td>
<td>Retail</td>
<td>1,976</td>
<td>1,911</td>
<td>3.4%</td>
<td>3</td>
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<tr>
<td>11</td>
<td>Albert Heijn</td>
<td>Retail</td>
<td>1,758</td>
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<td>-6.9%</td>
<td>5</td>
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<tr>
<td>12</td>
<td>Thuisbezorgd.nl</td>
<td>Online Food Delivery</td>
<td>1,592</td>
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<td>52.2%</td>
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</tbody>
</table>

### Top 30 Brand Value 2020: US$92,103 Million
### Top 30 Brand Value 2019: US$92,857 Million
### Change: -1%
1 Royal Dutch Shell

From humble beginnings as a family-run shop selling exotic seashells, Royal Dutch Shell has become the world's largest fuels retailer – operating filling stations that serve some 50 million people daily. In the late 1800s, the sons of London shopkeeper Marcus Samuel launched a fleet of steamers to carry oil through the Suez Canal; they called this venture Shell Transport and Trading Company. At the same, the Dutch Petroleum Company was developing an oil field in Sumatra, Indonesia. The two companies joined in 1907 to become the Royal Dutch Shell Group, which was represented from the start by a scallop-shell logo. Though best known for its convenience-focused fuel operations, Shell's vast reach also encompasses marine, aviation, chemical, gas, and low-carbon fuel operations. The company employs some 82,000 people across more than 70 countries. The company is publicly preparing for a transition to lower-carbon energy, and published a scenario detailing how society could meet the requirements of the Paris climate change agreement by 2070. The Paris Agreement has sent a signal around the world: climate change is a serious issue that governments are determined to address. Shell wants to play their part and contribute to the global effort to tackle climate change and meet carbon control goals. Working towards their Net Carbon Footprint ambition is how Shell plans to do this. Royal Dutch Shell is listed on the London Stock Exchange and Euronext Amsterdam.

Parent Company: Royal Dutch Shell Plc
Brand value: $19,016 Mil.
Headquarter City: The Hague
Industry: Energy
Year formed: 1907

2 Heineken

From a single brewery in Amsterdam 150 years ago, Heineken has grown into the world's most international brewer. Heineken is the number one brewer in Europe and the number two brewer in the world. It has over 80,000 employees and operates breweries, cider plants, and other production facilities in more than 70 countries. In the last decade, Heineken has significantly increased its exposure to emerging markets like China. Led by the Heineken brand, the Group now has a portfolio of more than 300 international, regional, local, and specialty beverages. Heineken Group's premium beer and cider brands include Birra Moretti, Red Stripe and Tiger beers. Heineken’s instantly recognizable star logo dates back to 1884 and was adapted from the medieval sign for beer; the brand’s green colorway also helps the brand stand out in stores and restaurants. In September 2019, Heineken launched a new campaign in the Netherlands focusing on Dutch ingenuity, pragmatism, and a healthy dose of self-mockery. To reinforce this idea the famous slogan “Bierplez?” has been brought back for this campaign. Also in 2019, Heineken became sponsor of the Formula 1 Heineken Dutch Grand Prix 2020, the first Formula 1 race to be held in the Netherlands in 35 years.

Parent Company: Heineken N.V.
Brand value: $12,594 Mil.
Headquarter City: Amsterdam
Industry: Beer
Year formed: 1864

3 Booking.com

Established in 1996 in Amsterdam, Booking.com has grown from a small Dutch start-up to one of the largest travel e-commerce companies in the world. Today, it’s more than just a hotel site: with a mission to empower people to experience the world, Booking.com invests in digital technology that helps take the friction out of travel. At Booking.com, you can book any kind of accommodation, from hostesses to igloos. In other words, and as their slogan puts it: “Booking.com: hotels, homes and everything in between.” The company has 198 offices in 70 countries worldwide; each day, more than 1,550,000 room nights are reserved on the platform, all with a price-match guarantee. The company’s marketing focus has long been focused on driving performance (especially through search engine advertising, online displays, and partnerships). Recently, however, the brand has started doing more extensive TV and video advertising in the Netherlands and beyond, aimed at encouraging their consumers to stop searching for and staring at travel ideas on social media, and instead to “be bold and press the confirmation button. Booking.com’s parent company, Booking Holdings Inc. (formerly The Priceline Group Inc.) is listed on Nasdaq.

Parent Company: Booking Holdings Inc.
Brand value: $12,199 Mil.
Headquarter City: Amsterdam
Industry: Travel Services
Year formed: 1996

4 Philips

Koninklijke (Royal) Philips N.V. is a Dutch multinational technology company headquartered in Amsterdam. Philips was founded in Eindhoven in 1891 by Gerard Philips and his father Frederik. Their plan? To bring cost-effective light bulbs to the masses. A string of iconic Philips inventions followed in the coming decades, including cassette, tapes, boomboxes, electric razors, home video recorders, televisions, and more. As Philips grew, it segmented into three columns: Philips Consumer Lifestyle, Philips Healthcare, and Philips Lighting. For many Dutch, Philips’s success is proof that the Netherlands can compete in the global technology realm. In recent years, the company has sharpened its focus on health technology, acquiring firms in the medical imaging, monitoring, and treatment spheres, and spinning off its lighting business. Philips generated 2018 sales of EUR 18.1 billion and employs approximately 77,000 employees, with sales and services in more than 100 countries. Just as significantly, Philips has estimated that its products, many of them green, touch more than 3 billion people’s lives each year. The company’s “Innovation and You” slogan signals that even amidst a strategic refocusing, Philips will always be dedicated to harnessing innovation to improve people’s time on the planet. Green innovation is an increasing focus, as seen in the decrease of their Philips’s operational carbon footprint by 50% in the last year, in 2019, Philips also opened their own windfarm. This initiative should put Philips on course to becoming. In the Netherlands, Philips’ sponsorships include the Rijksmuseum, Amsterdam Pride, and PSV Eindhoven. Shares of Philips are listed on Euronext Amsterdam.

Parent Company: Koninklijke Philips N.V.
Brand value: $10,965 Mil.
Headquarter city: Amsterdam
Industry: Technology
Year formed: 1891
ING is a Dutch banking group – the Netherlands’ largest – that has long been heralded for its agile embrace of technology. ING is present in over 40 countries and offers banking services to more than 37 million retail and wholesale banking customers worldwide. ING is a brand with a clear purpose: “Empowering people to stay a step ahead in life and in business.” ING has embraced digital disruption by focusing on user experience across all channels, including an early push toward online banking at home and abroad. Anchoring these changes is the brand’s orange lion logo, which underlines ING’s strong Dutch roots in the country’s postal savings system. ING employs more than 15,000 Dutch workers, and more than 3 million Dutch people use ING’s mobile app. The Netherlands is also the incubator for a new type of ING branch that’s modeled on a home, where people can get personal banking advice, have a coffee, and hold community meetings. ING focuses its sponsorships on two areas, sports & culture. Therefore, they sponsor for example: the Rijksmuseum, the Royal Dutch Football Federation, and the Royal Concertgebouw Orchestra. In the past year, ING introduced Apple Pay within the Federation, and the Royal Concertgebouw Orchestra.

KPN is a Dutch telecom provider with strong Dutch roots. KPN as a brand was founded in 1989, but its legacy traces back to 1881 and the Netherlands’ first government-run telegraph service, which was soon combined with postal and telephone services to create a state-run communications powerhouse. By the 2000s, KPN had privatized and spun off its postal and telephone services to government-run telegraph service, which was soon combined with postal and telephone services to create a state-run communications powerhouse. By the 2000s, KPN had privatized and spun off its postal and telephone services to create a state-run communications powerhouse. By the 2000s, KPN had privatized and spun off its postal and telephone services to create a state-run communications powerhouse. By the 2000s, KPN had privatized and spun off its postal and telephone services to create a state-run communications powerhouse. By the 2000s, KPN had privatized and spun off its postal and telephone services.

To be one of the first to embrace big data, activated through machine learning, resulting in a client-specific DSP (Demand Side Platform) algorithm? An advertiser who would be the first in the Netherlands to deploy Google’s latest innovation, “Google local ads”? Or a company that has embraced data throughout their entire organization? Well, they have, and the result has been double-digit growth. And that’s impressive, because in today’s world growth is difficult. Brands that do grow are the ones that self-analyze every aspect of their performance and constantly look for new ways to operate. Growth is attainable if you know where to look. And Specsavers knows that better than most.

Because, in their own words, it could all be better and simpler. Founded in 2012, they are the first full online bank in the Netherlands. Knab’s main goal: achieving the highest possible customer satisfaction through smart technology and personal service. It’s a pitch that seems to resonate with customers: BrandZ™ equity data shows that Knab ranks highest for Difference within the banks category. While well-known large banks seem to seek refuge in major themes such as sustainability and financial security, Knab goes back to the essence of “being there for consumers” and their personal needs. To do so, they provide advice that is useful for their customers right away. For example, if two identical withdrawals are written off from an account in quick succession (intentionally or not), consumers are notified of this so that they can check if this is correct – better safe than sorry when it comes to your money! When customers are traveling abroad, they receive in-app advice on whether to withdraw cash with or without currency conversions – so that they will never again have to pay too much. Services like these pay off: recent customer research by Kantar suggests that Knab exceeds already-high brand expectations on measures of consumer experience. This suggests that Knab can attract new users by taking up their brand culture even more highly via marketing and communications: once consumers see Knab for themselves, they won’t be let down.
7 Rabobank

Parent Company: Coöperatieve Rabobank U.A.
Brand value: $3,920 Mil.
Headquarter City: Utrecht
Industry: Banks
Year formed: 1972

Rabobank is an international financial cooperative with deep roots in the Netherlands. The bank’s history goes back to the late 19th century, when small agricultural cooperative banks were founded by Dutch farmers and horticulturists around the country. Rabobank as we know it today was created in 2016 through the merger of 106 local cooperative Rabobanks and the central Rabobank Nederland. Nowadays, Rabobank is the Netherlands’ second-largest bank, serving more than 6.7 million retail and 800,000 business customers with a comprehensive range of financial products and services. True to its roots, Rabobank is also active internationally as a financial services provider in the Food & Agricultural and Sustainability sectors. Rabobank operates in 40 countries worldwide and services approximately 10 million customers. After a series of reputational challenges in the first half of the 2010s, Rabobank has focused its brand on themes of security, earning a spot on lists of “The World’s Safest Banks” and winning awards for their “Environmental Finance Green Bonds.” Its advertisements and CSR initiatives focus on reducing hunger and food waste, and promoting a more circular economy with the theme of “growing a better world together.” Rabobank’s partnerships in sports include the Dutch Olympic Committee, TeamNL, the Dutch National Hockey Union, the Dutch Volleyball Union (NEVOBO), the Dutch Skating Union, and it is a partner in culture for the Lowlands festival.

8 ABN-AMRO

Parent Company: ABN AMRO Group N.V.
Brand value: $2,793 Mil.
Headquarter City: Amsterdam
Industry: Banks
Year formed: 1991

Although parts of ABN AMRO date back to 1765, its ledger of mergers and acquisitions means that the bank encompasses many histories: banks for overseas Dutchmen, banks serving the cities of Amsterdam and Rotterdam, and the Netherlands’ first nonprofit savings bank are just some of the firms that have combined to make up modern ABN AMRO. Today the bank is the Netherlands’ third largest: a modern, full-service institution with more than 19,000 employees and some €400 billion in assets. True to its diverse background, ABN AMRO serves retail, private, and corporate banking clients, with a primary focus on the Netherlands and strategy is to be a “relationship-driven bank” that also stays on the technological cutting edge, especially in the area of mobile banking. ABN AMRO used to be one the biggest advertisers in the Netherlands, but in recent years media spend has increasingly focused on digital and radio. Many of its advertisements feature a character named Vincent and tout how sustainable investment efforts can lead to “Gains on all fronts,” and “Finance the future.” Although briefly nationalized during the global financial crisis, ABN AMRO was re-listed on Euronext Amsterdam in 2015.
9 ZIGGO

Parent Company: VodafoneZiggo Group Holding B.V.
Brand value: $2,575 Mil.
Headquarter City: Utrecht
Industry: Telecom Providers
Year formed: 2008

Ziggo has benefitted from - and often led - the trend of consolidation among Dutch entertainment service providers and telecom companies. Ziggo formed as the result of a merger between Multikabel, @Home Network, and Casema, and grew larger following a subsequent merger with UPC Nederland in 2015. In 2017, Ziggo completed a joint venture with Vodafone Nederland, further extending the brand’s reach. Its joint mission: enjoyment and progress with every connection. Nowadays, Ziggo has 9.7 million customers, including nearly 4 million television, over 3 million internet, and 2.5 million fixed and mobile telephone subscribers. On the entertainment side, Ziggo is the biggest TV provider in the Netherlands with some 52% market share. It stands out from its competitors by holding the exclusive Dutch license to content like HBO series and Formula 1 Racing. Besides advertising for its entertainment and voice bundles, Ziggo serves as the shirt sponsor of the football club Ajax, and also lends its name to the Ziggo Dome, a massive indoor arena that has hosted artists like Ariana Grande and Katy Perry. Ziggo is partly owned by Nasdaq-listed Liberty Global, and partly by privately-held Sperwer Holding B.V.

10 SPAR

Parent Company: Spar International BV
Brand value: $1,976 Mil.
Headquarter City: Amsterdam
Industry: Retail
Year formed: 1932

SPAR is an international group of groceries and convenience stores offering a high-quality, high-value shopping experience - a focus on thrift that is echoed in its name, which recalls the Dutch word for “save.” Spar aims to remain the world’s leading voluntary food retail chain and to continue to grow its brand by enhancing the competitiveness, productivity, and profitability of its retail and wholesale partners. The first SPAR store opened in the Netherlands in 1932; today the brand counts more than 12,700 stores in 48 countries. In 2018 SPAR had €35.8 billion in global sales and served 13.5 million customers each day. While SPAR’s franchise model means that owners can tailor their store’s offerings based on their local context, the brand’s outsides are united by their green & tree logo, a focus on price and quality, and a wide array of SPAR Own Brand Products. SPAR Netherlands in particular has been a fountain of innovation for the brand, recently expanding its to-go offerings and convenience store formats, as well as offering checkout-less mobile payment through its SPAR University app. Although Spar has had a relatively low presence in the Netherlands compared to other grocery stores, recently SPAR has increased its visibility with new concepts such as Spar Express (at Texaco/ESSO fuel stations), Spar City, Spar Neighborhood, Spar University, and Spar Enjoy (shops at vacation grounds) formats. All serve to enhance a simple vision: “SPAR is the store for your daily convenience.” The brand’s Responsible Retailing initiative has led to more local sourcing as well as support for community wellness initiatives; Spar is also known for its sports sponsorships, most notably of European Athletics. Spar is partly owned by the Euronext Amsterdam-listed Sigro Food Group, and partly by privately-held Sperwer Holding B.V.

11 Amstel

Parent Company: Heineken NV
Brand value: $1,758 Mil.
Headquarter City: Zoeterwoude
Industry: Beer
Year formed: 1870

Amstel is an international beer brand that remains intimately tied to its Dutch heritage. Indeed, the brand’s name comes from the Amstel River, and its origins involve two friends coming together near the riverside to establish a brewery. Today Amstel is sold in over 100 countries worldwide and is especially known abroad for its light offerings. At home, the brand offers a full array of lager, pilsner, and non-alcoholic beers, and is known for its golden, full taste. The brand enjoys a strong market position behind Heineken, and in fact Heineken N.V. has owned Amstel since 1968. Amstel is well known for sponsoring the EUFA Europa league, the Amstel Gold bike race, and the Friends of Amstel Live concert. These concerts are running into their 25th edition. Amstel launched a new campaign in May 2018, putting the taste of its beer front and center – the idea being that Amstel is not trying too hard to be cool, tough, or trendy, and certainly not “epic” – but is rather the beer with the best taste for real people. Amstel’s parent company Heineken N.V. trades on Euronext Amsterdam.

12 Thuisbezorgd.nl

Parent Company: Takeaway.com NV
Brand value: $1,592 Mil.
Headquarter City: Amsterdam
Industry: Online Food Delivery
Year formed: 2000

Thuisbezorgd.nl is beloved in the Netherlands as a quirky national success story. It’s also, not incidentally, the leading online food delivery marketplace in continental Europe. Its beginnings are now the stuff of legend: Jitse Groen founded the site in 2000 when he was still a student, after discovering how difficult it was to order food online. The company has grown by leaps and bounds ever since: in the Netherlands alone, the company processed 32.7 million orders in 2018, which meant a strong year-on-year growth of 19% compared to the year prior. The company protects its brand awareness with extensive advertising, often around the theme of “Time for Takeaway.com”; the message is that with Takeaway.com, food arrives “on time” so you can have a “great time.” This year Thuisbezorgd.nl welcomed several new international and local chains to their menu, including Five Guys, Cinnabon, Yoghurt Barn, AH To Go (Albert Heijn), and Dunkin’ Donuts, demonstrating the strength of the brand. In July 2019, Thuisbezorgd.nl shook the world of online food delivery by announcing the fusion with rival British rival Just Eat to create a global food delivery company. If approved by shareholders, Thuisbezorgd CEO Jitse Groen would remain CEO of the new company acting under the name Just Eat Takeaway.
**THE IDEA IS SIMPLE: CONNECTING PEOPLE TOGETHER FOR THE GREATER GOOD**

Quicargo is an online platform that links empty trucks to companies with a demand for freight shipment. The idea is simple, connecting people together for the greater good – namely, the environment. This is a credible purpose that fits perfectly into our increasingly connected and sustainability-minded age. The fact is that some 50% of the trucks on European roads are at least half empty. From this insight, Quicargo saw a gap in the market, and an opportunity to do something good: they could link people with relatively small transport demands to carriers with open capacity, and at the same time reduce overall transport emissions by consolidating cargo trips. It’s an example that other companies can learn from, because while being sustainable is increasingly “hip,” to be credible as a brand you have to actually solve a problem (as opposed to partially solving a problem that’s mostly of your own creation). Another lesson that brands can draw from Quicargo is the concept of connection: with new technology it is increasingly easy to get in touch with anyone and everyone, but therefore also harder to find the right person for your specific question. Quicargo understands this, and offers an easy solution with a platform that matches the right supply to the right demand. In a way, this makes the platform something like the environmentally conscious brother of Uber, but for the transport world. And as they say: the proof is in the pudding. So far, Quicargo has saved 120,000 km of superfluous trips, and thus reduced CO2 emissions from transport by 3 percent in its market. Moreover, in only three short years of existence, Quicargo has already expanded internationally throughout the entire Benelux region. The next step? World domination!

**MANAGING AN ISSUE OR CRISIS BEGINS LONG BEFORE ONE ACTUALLY OCCURS**

Issues like the fatal technical problems with the Boeing Max 737 or recent safety discussions about Huawei telephones highlight just how unexpectedly an issue or crisis can occur for brands, and the tremendous impact one such crisis can have on a large number of people. Most companies and governments believe they are well prepared for these kinds of shock occurrences. But how well are you really prepared if an issue emerges – for an incident that could have a significant impact on your business operations, or the reputation of your brand?

Issue and crisis management is a constant process, and certainly not a one-off activity to be carried out in the wake of an incident. Plans and processes for issues and crises must be regularly checked and validated to ensure they are as relevant and complete as possible for whatever risks your business might face. To be truly effective, issue and crisis management must start long before an incident occurs.

What’s more, handling an issue or crisis doesn’t end with an evaluation after the most immediate problems have been addressed. Issues and crises can’t have a long-lasting impact, both internally and externally. So it’s important to commit to a long-term recovery program to restore trust, both internally and externally.

In sum, effective issue and crisis management isn’t something that begins when a crisis occurs. It’s an ongoing process that starts long before any single event. It begins with thorough preparation for any potential threats that your brand could realistically face, and it requires the commitment to restoring trust long after the immediate symptoms of an issue begin to fade away.

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**13 Action**

**Parent Company:** Action Holding BV  
**Brand Value:** $1,123 Mil.  
**Headquarter City:** Zwaagdijk  
**Category:** Retail  
**Year formed:** 1993

Established in 1993, Action is the leading non-food discount retailer in Europe. Action started as a small retail store in Enkhuizen, the Netherlands; today, there are 1,325 stores across six countries, with a combined revenue of €4.2 billion in revenue. The core product assortment of Action includes household goods, office supplies, cosmetics, personal care, snacks, and toys. Notably, however, only 35 percent of the store’s product range is fixed, which encourages shoppers to return again and again, and leads to very high conversion rates for stores. Action recently won “European Retailer of the Year” award for four consecutive years, and its focus on extreme value has spared it from pressures facing other department stores. Although Action does not have a webshop, they have a large online presence, including nearly 1.5 million Facebook followers. In 2018, Action celebrated 25 years of surprising customers with the lowest possible prices and a broad, everchanging assortment of products, with a campaign around the theme of “small prices, big smile.”

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**14 Nationale Nederlanden**

**Parent Company:** NN Group N.V.  
**Brand Value:** $1,027 Mil.  
**Headquarter City:** The Hague  
**Category:** Insurance  
**Year formed:** 1845

With over 5 million private and business customers, Nationale-Nederlanden is one of the largest financial service providers in the Netherlands. It offers a wide range of financial services such as insurance, mortgages, pensions, savings, and investments. The brand’s parent company, NN Group, split from ING Group in 2013, and operates in 18 countries. Since the split, Nationale-Nederlanden’s communications have emphasized the individual focus of its services; one recent campaign slogan emphasizes that, “There is only one Dutch person like you.” The brand’s sponsorships focus on the individual sport of running, with support ranging from the establishment of a professional team in partnership with Nike down to helping amateur racers. In collaboration with Douwe Egberts, there is also a Nationale-Nederlanden Café in Rotterdam that offers workshops on themes ranging from retirement planning to barista skills. Shares of Nationale-Nederlanden’s parent company NN Group N.V. are listed in Amsterdam.
15 Albert Heijn

Parent Company: Koninklijke Ahold Delhaize N.V.
Brand Value: $965 Mil.
Headquarter City: Zaandam
Category: Retail
Year formed: 1887

Albert Heijn Sr. founded his eponymous grocery in 1887 in a tiny storefront; nowadays, Albert Heijn is the largest food retailer in the Netherlands, with around 890 stores (including 80 to-go stores) and a market share of around 35%. Albert Heijn is known for its focus on gourmet products and innovation, which allows Albert Heijn to charge more premium prices than its competition. The chain has long driven food and service trends, and has popularized products such as wine and refrigerators; more recently, Albert Heijn was the first Dutch supermarket to offer online grocery shopping. Albert Heijn also mastered “branded content” before that was a term of art; the chain’s food magazine, Allerhande, is the Netherlands’ best-read magazine. The chain has furthered its cultural reach with the launch of YouTube channel Appie Today, which shares daily food videos with Dutch netizens. Albert Heijn has also started experimenting with “naked” fruit and vegetables to reduce plastic waste, and has instituted “dynamic digital discount price tags” to reduce wastage: the closer a product is to its expiry date, the higher the discount. Shares of parent company Koninklijke Ahold Delhaize N.V. are primarily traded on Euronext Amsterdam.

16 Coolblue

Parent Company: Coolblue N.V.
Brand Value: $795 Mil.
Headquarter City: Rotterdam
Category: Retail
Year formed: 1999

What started in 1999 as a company established by three friends selling MP3 players has transformed into an e-commerce giant specialized in consumer electronics and white goods that employs more than 3000 people: this is the success story of Coolblue. The goal of Coolblue is as simple as it is effective: Anything for a smile. The key to the success of Coolblue all leads back to their special corporate culture which is based on four core values: headstrong, friends, flexibility, and a go-for-it mentality. A good example of putting these values in action is the trendsetting CoolblueDelivers white good service introduced in 2018. This service provides customers with optional delivery time slots, so they do not have to wait at home all day for their order to be delivered, but instead can choose whenever suits them best. Upon arrival, Coolblue’s delivery employees lift heavy white goods (up to the 4th floor), install these appliances, and make sure they work correctly. If requested, they can also take the old white goods back with them for recycling. All of this comes at no cost to the customer. This clear focus on service has helped Coolblue differentiate themselves from competitors such as Amazon and bol.com. Going forward, Coolblue hopes to expand their product roster, make their website multilingual to serve new markets, open more physical stores, and introduce new services.
17 Senseo

Parent Company: Jacobs Douwe Egberts B.V.
Brand Value: $774 Mil.
Headquarter City: Amsterdam
Category: Beverages
Year formed: 2001

Senseo is the name for a coffee brand system developed by Jacobs Douwe Egberts, in a technical partnership with Phillips. The coffee system is known for the pods it uses to brew single-serve cups of coffee. The Senseo machine has become very popular (with tens of millions of machines sold globally) because of its modern design, convenience, speed, and lower price compared to some competitors. The Senseo system is the number one single-serve coffee system in the Netherlands and several other European countries. Going forward, Senseo wants to be loved just as much for its coffee as for its appliances – to be a coffee brand that also wakes people up to living in the now. An international advertising campaign has been developed to support this idea. Jacobs Douwe Egberts B.V. is controlled by family-owned JAB Holding Company.

18 Bol.com

Parent Company: Koninklijke Ahold Delhaize NV
Brand Value: $653 Mil.
Headquarter City: Utrecht
Category: Retail
Year Formed: 1999

Established in 1999 as an online bookseller, 20 years later bol.com has become the leading web shop in the Netherlands with more than 20 categories sold and more than 1.5 million site visits a day. Three quarters of the Dutch population visitbol.com at least once a month, leading to a new projected revenue record of €2.1 billion for 2019. bol.com’s name originated from an abbreviation of the German media concern that founded it: Bertelsmann On-Line. While in the beginning it was active in many countries, today bol.com operates solely in the Netherlands and Belgium. From 2012 on, bol.com has been part of the Ahold Delhaize family, which also includes the leading Dutch supermarket brand Albert Heijn. bol.com operates solely in the Netherlands and Belgium. From 2012 on, bol.com has been part of the Ahold Delhaize family, which also includes the leading Dutch supermarket brand Albert Heijn. bol.com has won awards as the “best webshop of the Netherlands” many times since its founding. It is known for its innovative and entrepreneurial way of doing business, as well as its consumer focus. The webshop has kept evolving over time, for example by allowing third parties to sell on its platform since 2011, which has led to many thousands of “partner” sellers trading on the platform. Indeed, bol.com plans to evolve from “a webshop only” into a “trading platform” for consumers and business in the years to come. Shares of parent company Koninklijke Ahold Delhaize NV are primarily traded on Euronext Amsterdam.

During one of Amsterdam’s muggy summer days a wildposting campaign by local “unicorn” brand Ace & Tate caught my eye. In familiar fashionable style, the eyewear company advertised their sunnies alongside a very appealing free popsicle at every store visit. This was a simple, smart and relatively cost-efficient way of contextually relevant geo-targeting – and one that used traditional media, no less.

With the ongoing roll-out of Digital Out Of Home (DOOH) in the Netherlands, brands get access to programmatic outdoor buys at scale, allowing for new ways of contextual targeting like weather, location, or time of the day. If played well, brands can increase the relevance of their messages with more engaging and dynamic creative work. But there are also risks when not played well: messaging can become fragmented and visibility drops with tight targeting.

From Kantar’s Art of Integration, we know integrated campaigns centered around a single campaign idea deliver stronger brand effects. Our CrossMedia work has also demonstrated that DOOH is more synergy reliant than other media – that is, it’s strongest when playing with other media to deliver brand awareness and associations. This means DOOH needs a recognizable creative connection and reach overlap with other campaign media. Flexible campaign ideas that allow for contextual tweaks without confusing the campaign message, that thoroughly integrate a brand’s distinctive assets, and that use DOOH creatives that are eye catching and instantly clear, will successfully support brands.

As with all media that allow for targeting, DOOH may seduce marketers to focus their efforts on short term activation. Sustainable brand growth comes from a balance between the long and short term. DOOH dynamic properties represent an opportunity for marketers to amp up their creative ambitions; receptivity to outdoor advertising is relatively strong, so brands are permitted to be a bit more disruptive!
Aegon is a multinational life insurance, pensions, and asset management brand with a rich history and international reach. The brand’s heritage dates back nearly two centuries, to the Dutch insurance organizations that provided modest funds for people to arrange burials. Since 2015, Aegon has been one of the top 10 largest insurance companies in the world, with some 28.5 million customers in over 20 countries; they manage more than €804 billion of revenue-generating investments. The company’s slogan is “Transform Tomorrow,” a directive they’ve encouraged by sponsoring hackathons worldwide. Fittingly, Aegon has also pursued social responsibility work centered around longevity, retirement, and aging; it has established a research center around these subjects and raised funds to combat dementia. Recently Aegon signed a contract to sponsor the Special Olympics Netherlands 2020, started efforts to narrow the gender pay gap. Besides that the company supports Dutch dance troupes, Amsterdam Pride, and a number of professional golfers. The company is listed on Euronext Amsterdam.

### Jumbo

**Parent Company:**
Jumbo Supermarkten B.V.

**Brand Value:**
$507 Mil.

**Headquarter City:**
Veghel

**Category:**
Retail

**Year formed:**
1979

Jumbo is a privately held supermarket chain in the Netherlands that, after a string of acquisitions, has become a strong Dutch number two with 618 stores and over €7.8 billion in revenue. Unusually, Jumbo remains family owned and adheres to an idiomatic manifest of “Seven Certainties.” These include “lowest price,” “widest assortment,” and giving free groceries to those who are fourth in line in a checkout row. Jumbo has often won prizes for being the best retail chain, the best supermarket chain, and the most client-friendly company. Jumbo puts the client central with its unique formula: “best service + largest assortment X lowest prices.” Jumbo recently bought restaurant chain LaPlace as part of its goal to master all three ways people interact with food in a grocery store: “Make it, Take it, and Eat it,” a philosophy also promoted by the continued opening of Jumbo Food Markets throughout the Netherlands. This food market concept is dedicated to 100% fresh, healthy, and delicious food for the lowest possible price, while delivering a food experience. Going forward, investments in online and mobile retail are aimed at turning Jumbo into a service provider in addition to a store operator. Jumbo has a long-running advertising campaign centered around Dutch actor Frank Lammers as a funny family patriarch, and also sponsors Formula 1 and cycling teams.

### Douwe Egberts

**Parent Company:**
Jacobs Douwe Egberts B.V.

**Brand Value:**
$481 Mil.

**Headquarter City:**
Amsterdam

**Category:**
Beverages

**Year formed:**
1753

Douwe Egberts – also known as DE – is a Dutch coffee brand with heritage tracing back to 1753. Today their range encompasses ground roasts, instant coffee, coffee pods, and more. They’ve adapted to modern tastes by offering drinks like cappuccino and espresso at home and at Douwe Egberts cafes. A strong theme in DE’s history is loyalty: In 1924, the company became one of the first consumer goods brands to introduce a rewards system. Almost a century later, DE’s is the oldest still active saving system in the Netherlands; almost 70% of all households have saved their Douwe Egberts coffee seals. DE is also created one of the most successful ongoing campaigns in Dutch history: “Neighbors’ Day,” which since 2006 has been celebrated as a time for neighbors to get to know each other. Nowadays, activities, with over 1 million participants.

### KLM

**Parent Company:**
Air France - KLM S.A.

**Brand Value:**
$468 Mil.

**Headquarter City:**
Amstelveen

**Category:**
Travel Services

**Year formed:**
1919

KLM is the Netherlands’ official flag carrier, and is the oldest airline in the world still operating under its original name; In March 2019, KLM celebrated its 100-year anniversary. A merger with Air France in 2004 hasn’t lessened the loyalty many Dutch feel toward their airline, nor its national importance. Today the company has some 35,500 employees, and flies to more than 150 destinations. KLM is known for personal, premium service. This is exemplified by the iconic Delphi Blue houses that KLM gifts to World Business Class passengers - but also by the company’s swift and innovative use of social media, which allows them to respond to customer communications “within the hour.” The company received a media boost when the King of Holland revealed he’d be piloting KLM flights for the past 21 years. Recently, the company found out that almost half of Germany (46%) did not recognize their brand. They thought people were a restaurant, radio station or bank. They therefore created a successful campaign called “We are an airline” in which they opened a KLM-branded restaurant, radio station, and KLMs to educate potential European travelers. The company also sponsors the KLM Open golf tournament and the Amsterdam Dance Event, and recently stepped into running by sponsoring the Urban Trail Series. Its parent company Air France - KLM is listed on Euronext.
Capital LLC. Marcel Boekhoorn, bought HEMA in 2018 from Lion with e-commerce department store Wehkamp. for a new concept store in collaboration with to grow. Recently they announced a pilot project to expand abroad and looking for new initiatives other department stores, and HEMA continues have insulated it from some of the pressures facing the Dutch LGBTQ community. HEMA's budget offerings Diversity Award in the Netherlands for supporting the line. In February 2019, HEMA won the Campaign media attention for its gender-neutral children’s online and mobile stores; its company recently won HEMA commands a sizable online presence for its With a combined social-media reach of 1 million, HEMA has more than 750 stores across 9 countries. franchising organization in the Netherlands; today, typically Dutch ways. HEMA is the /f_i irst and largest to beauty – all packaged in optimistic, clear, and optimistic “worlds” ranging food to home to fashion – all packaged in optimistic, clear, and value. From the beginning, HEMA has been a department store focused on design and value. From the beginning, HEMA has been a department store for “ordinary people,” focusing on a “democratic design” approach for shoppers of all income levels. Products are arranged in different in-store “worlds” ranging food to home to fashion – all packaged in optimistic, clear, and typically Dutch ways. HEMA is the first and largest franchising organization in the Netherlands; today, HEMA has more than 750 stores across 9 countries. With a combined social-media reach of 1 million, HEMA commands a sizable online presence for its online and mobile stores; its company recently won media attention for its gender-neutral children’s line. In February 2019, HEMA won the Campaign Diversity Award in the Netherlands for supporting the Dutch LGBTIQ community. HEMA’s budget offerings have insulated it from some of the pressures facing other department stores, and HEMA continues to expand abroad and looking for new initiatives to grow. Recently they announced a pilot project for a new concept store in collaboration with grocery store Albert Heijn, as well as collaboration with e-commerce department store Wehkamp. Ramphais Investments, owned by Dutch billionaire Marcil Boekhoom, bought HEMA in 2018 from Lion Capital LLC. a.s.r. is one of the largest insurance organizations in the Netherlands, and can trace its history back to the 1720 establishment of the Stad Rotterdam Verzekering company. Today’s a.s.r was formed through a series of mergers in the early 2000s, followed by a period of nationalization and privatization that culminated in a.s.r’s listing on Euronext Amsterdam in 2016. The company now has some 3,400 employees and an operating result of €142 million in 2018. Its insurance offerings and sub-brands fall into three streams: Non-Life (through brands like a.s.r, De Amersfoortaart, and Dta); Life; and Funeral Expenses. Many of a.s.r’s offerings in spaces like health and occupational disability rank among the Netherlands’ top three providers in their categories. a.s.r has also recently begun to offer a variety of banking and asset management services, and is an active player in acquiring new assets. For the past several years a.s.r has employed the Dutch rapper Sticks to tell “The Other Story” about the company’s social responsibility programs and insurance offerings. a.s.r. Nederland N.V. Brand Value: $358 Mil. Category: Insurance Year Formed: 1926 Year Formed: 1720

COLLABORATION YIELDS REWARDS

Marketers know that strong brands typically benefit from consistency and the propagation of a clear brand identity. In recent years, however, many brands have sought to add an edge to their identity by entering into partnerships with other brands or designers. These so-called “collabs” trace their origins to the fashion and street culture world – where, in hopes of appealing to niche groups of young consumers, major brands such as Nike and Adidas have worked with more exclusive designers or music artists on a limited range of products. Nowadays this collaboration phenomenon is also extending into unexpected categories beyond apparel. For example, IKEA has cooperated with Sonos on a suite of speaker-furniture hybrid products, while a “collab” between Evian and Louis Vuitton / Off-White designer Virgil Abloh has led to bottles of water selling for hundreds of euros. Today more than ever, companies can partner with outside brands to broaden their own brands’ identities and increase brand value. It will be interesting to see which Dutch brands truly master this phenomenon in 2020.

PLATFORMS THAT EMPOWER CONSUMERS THROUGH DIGITAL CHANNELS BECOME PROMINENT FIXTURES OF THE BRAND LANDSCAPE

In recent years, platforms that do not own content, cars, real estate, or inventory, but which instead empower consumers through digital channels, have become prominent fixtures of the global brand landscape. These companies use technologies that facilitate what is now known as “the sharing economy.” But while companies like Uber have benefitted from the consumer trend of possessing less and sharing more material goods with others, these brands were largely not founded from a desire to empower people with a shared social purpose to find each other and combine forces. The app Too Good To Go goes a step further in empowering consumers. Lately, the impact of food waste has been gathering momentum in consumers’ minds. Too Good To Go makes use of this momentum – and facilitates the fight against large-scale food waste – by offering a platform that brings together buyers (consumers like you and I) and providers (business like supermarkets, restaurants, and bakeries looking to get rid of excess inventory). Too Good To Go seems to have all ingredients for a strong brand in place: it creates a strong emotional affinity with its users; meets the functional need of providing people with fresh food; and is salient, as it is all around users in the form of a wide network of participating businesses.
Grolsch was founded in 1615 and is one of the oldest companies in the Netherlands. It earned the prefix “Royal” in 1995 in recognition of its contributions to Dutch heritage. Indeed, for all its international expansion — Grolsch is available in 70 countries — Grolsch remains one of the Netherlands’ most loved premium beers, instantly recognizable for its swing-top bottle. Grolsch used this unique brand asset in March 2018 when launching a new brand campaign called “taste character,” showing this swing-top battle during typical and recognizable Grolsch moments. Other brand communications focus on the love of brewers and connoisseurs: taglines like “Craftsmanship is mastery,” “Beer—experts ask for Grolsch,” and “One day you will stop drinking beer and start drinking Grolsch,” underscore this focus.

Hertog Jan’s focus on premium beers has helped it retain loyal drinkers even as customers’ palates grew more sophisticated. The brand is eager to compete on taste and quality, as it is widely seen as a brewer with a meaningful edge in crafting delicious beer. Every year Hertog Jan’s limited edition “Grand Prestige” releases burnish the label by showcasing new types of craft technique (for instance, aging in oak barrels); Hertog Jan’s brewers are a star focus of many brand communications, and can be met during brewery tours. One effective campaign featured employees at the brand’s Arcen Brewery working. “Out of the love for beer.” The brand’s credibility in the craft space has recently allowed them to expand their range into non-alcoholic and radler categories. Recently, Hertog Jan launched a “Digital Maturing Cellar” which gives beer lovers tips on how to age their bottles at home. This project will be guided for 6 years, which is a bold move because it asks customers to be patient and work with Hertog Jan for 6 years straight. Hertog Jan’s parent company AB InBev is primarily traded on Euronext.

Bavaria is one of the Netherlands’ many craft beer brands. As it celebrates its 300th anniversary, Bavaria finds itself thriving at the intersection of heritage and value. Its name refers to the “Bavarian” method of bottom-fermenting beer — it was the first beer made this way in the Netherlands — while its price positioning places Bavaria between private label and the big mainstream brands. The company saw record revenue in 2017 and nowadays exports to 130 countries worldwide. Their introduction this decade of non-alcoholic beers has fueled expansion into the Middle East while also serving as the centerpiece of a Diego Maradona-fronted campaign at home. These traditional ad campaigns are supplemented by well-known, humorous “ambush” marketing tactics. At a time when consumers are increasingly interested in sourcing, Bavaria also has the benefit of producing their own malt and owning their own water spring. The brand is privately owned, private relatively recent 30 years.

SNS Bank is one of the largest banks in the Netherlands in terms of total assets. In 2013, SNS was nationalized by the Dutch government; In 2017, it was merged into state-owned de Volksbank. Moving away from the property investments that led to nationalization, SNS aims to be a bank for regular Dutch savers—a course that fits with the bank’s roots as the Netherlands’ first savings bank. Today, this “social” bank aims to stand out by offering “perfectly normal” services with a “human touch” across 197 branches. To underscore this focus, SNS offers slightly higher interest rates on savings accounts than its major competitors, aims to go climate-neutral, and recently pledged that it would no longer work with debt collection agencies. In 2017, SNS’s total customer base rose 1 percent to 1.5 million. In their recent campaigns SNS has focused on the “typical Dutchman” and deals with real-world issues such as a fear for negotiating a price when buying products. Going forward, SNS has the ambition to be a larger, visible player in the mortgage and payments markets, while also navigating a possible privatization effort.
Though it’s been owned by Kraft Heinz since 2001, Honig is an iconic Dutch brand, known nationwide for its orange packaging and advertisements featuring multicultural Dutch families. At the heart of the brand’s message is an imperative shout: “Aan tafel!” which means “Come to the table – it’s dinner time!” For over 150 years, the purpose of Honig has been to help families eat dinner together, mostly through manufacturing dry meal ingredients like pastas, soups, sauces, meal kits, and baking ingredients. In recent years, the brand has been challenged by increasing consumer preference for scratch cooking, coupled with distrust of packaged ingredients. In response, the company reduced salt and MSG usage in 2016, and launched digital campaigns featuring influencers combining Honig ingredients with fresh ingredients to create healthful meals. The company has also adapted to changing Dutch family dynamics by introducing packaging for two- and eight-person households. Shares of Honig’s parent company Kraft Heinz are listed on Nasdaq.

Brand is the Netherlands’ oldest beer brand, tracing its heritage back to 1340 and the small town of Wijlre. Brand was given its current name in 1871; today, Royal Brand’s Beer Brewery N.V. is fully owned by Heineken. Brand’s brewery creates 14 different varieties of premium beer, which are primarily sold in the Netherlands with some distribution throughout Europe and in the USA. Brand’s core offering, a pilsner, is brewed with “more hops” than the competition, giving it a “unique, powerful,” fully malted taste. Another offering, the Imperator, was the Netherlands’ first specialty beer. The brand’s latest offering, a cloudy unfiltered pilsner, debuted last year. In 2014, Brand debuted redesigned bottles that married traditional blackletter font with a transparent, “label-less” body. This combination of modernity and tradition continues through Brand’s sponsorship of Pinkpop, one of the Netherlands’ largest music festivals. Brand’s parent company, Heineken N.V., is listed on the Euronext Amsterdam.

The Netherlands may not yet have entered the era of the 30 minute e-commerce delivery service, as is now becoming common in some parts of China – but the Netherlands’ largest e-retailer, bol.com, has now launched 2-hour delivery service in Amsterdam. By offering unsurpassed convenience through its super-speedy delivery options, as well as a pick-up partnership with leading Dutch grocer Albert Heijn, bol.com has been uniquely successful at keeping the likes of Amazon at bay. Crucially, bol.com is expanding consumers’ expectations as it goes, meaning other brands have to play catch-up in order to not fall behind. Indeed, many brands simply decide to join an existing delivery ecosystem like bol.com’s, as these e-commerce platforms increasingly source their growth through third-party sales.

Brand has capitalized well on this shift toward experiences is Polarsteps. With the Polarsteps app, friends and family can follow you closely and enjoy your trip live and in the moment. Forget the old-fashioned hours of tinkering with your photo album – instead, Polarsteps automatically registers where you have been and leaves a trail of footsteps to which you can later add photos and text. It’s a simple way to immortalize and share travel experiences, including with those left behind at home. The app inspires and connects – a purpose that is completely in line with the new generations and its focus on experiences instead of possessions. This holds a wise lesson for other brands, because by understanding the needs of the target group, Polarsteps has raised 1.25 million euros in funding, all with a marketing budget of zero.

The advent of e-commerce delivery services

MILLENNIALS TEND TO CHOOSE EXPERIENCES OVER POSSESSIONS

Millennials would rather take a nice trip than have money in the bank, because saving is always possible later. These preferences make a kind of psychological sense, for while the happiness of new things quickly disappears, an experience provides ongoing happiness through the accessing and reliving your pleasant memories. Moreover, experiences connect people with each other, because you take them in together, or share them later with others. It’s not for nothing that the term “bucket list” – a collection of experiences that you want to experience before your death – is now included in the Van Dale dictionary. A Dutch brand that has capitalized well on this shift toward experiences is Polarsteps. With the Polarsteps app, friends and family can follow you closely and enjoy your trip live and in the moment. Forget the old-fashioned hours of tinkering with your photo album – instead, Polarsteps automatically registers where you have been and leaves a trail of footsteps to which you can later add photos and text. It’s a simple way to immortalize and share travel experiences, including with those left behind at home. The app inspires and connects – a purpose that is completely in line with the new generations and its focus on experiences instead of possessions. This holds a wise lesson for other brands, because by understanding the needs of the target group, Polarsteps has raised 1.25 million euros in funding, all with a marketing budget of zero.

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HEINEKEN: AT EVERY TOUCHPOINT AND SENSORY EXPERIENCE WE CONSIDER DESIGN

This year Heineken ranked eighth globally in The Brandz™ Brand Contribution list, attesting to the Dutch brewer’s formidable street credibility amongst consumers. Graham Sturt, Creative Director of VBAT design agency, sat down with Mark van Iterson, Global Director of Integrated Design at Heineken, to talk about how the Dutch brewer balances its unique heritage with its progressive approach to building its brand.

Heineken is the second most valuable brand in the Netherlands (after Shell) and the second most valuable beer brand globally (after Budweiser). What do you attribute this success to?

Our focus. Our company name is Heineken, our brand name is Heineken, our whole focus is on Heineken. Heineken is our priority and has been for 150 years. Over the years we have been very consistent in our vision, how we innovate, and how we build our brand.

Looking at the Brandz™ global Top 15 for brand contribution you see four luxury brands, four fashion brands, and two beverage makers alongside Pampers, Fedex, and PayPal. What do you think these brands have in common?

I’d say we all understand the added value of brand building, of creating emotion and experiences – on top of the functional features of our products. It sounds simple, but it’s not. These brands understand how to bring value in a way that people are willing to pay for it.

Why such strong representation of beer?

Beer is a very emotional category and so much a part of people’s daily lives. It’s about friendship and family, about going out and meeting new people. These are very human emotions with strong associations and values attached to them, and beer is part of that. It’s why my job is so interesting.

What role does design play in creating experience and emotion?

It’s crucial. At Heineken we define design in the broadest sense of the word. Every touchpoint in point of sale or consumption, every sensory experience – visual, tactile, the sound of opening a bottle – we consider design. I oversee an integrated design department that designs every point of the consumer journey.

How does Heineken use design to differentiate itself from other beer brands?

In the basis, it’s about our visual iconic essence: The green bottle, red star and wordmark with smiling “e”-s. We are very careful with these iconic assets, but we are also not afraid to be playful and bold, to stay newsworthy and relevant. Since we launched City Editions in 2014, we’ve regularly designed limited editions, enforcing our involvement in UEFA Champions League, F1, James Bond and the Rugby World Cup, but also for local events like the Sint Martin regatta or orange celebrations in the Netherlands. These are great example of design driving engagement. They give us immediate scale, make us unique, and put our brand into millions of hands.

How do you balance the heritage of your brand with the future of your brand?

That’s a real balancing act. Heineken is a progressive brand. For us, heritage is a springboard for creativity and innovation. Heritage makes us understand where we came from, and ensures that we stay true to who we are.

What are you doing to raise the emotional value of your brand?

A large part of what we do is designed to add emotional value. This has always been the case at Heineken. When Gerard Adriaan Heineken decided to use green bottles instead of brown ones like everyone else, he understood that if you want to sell premium beer you better stand out – literally. The green bottle shows naturalness, status, and connoisseurship. It’s the DNA of our brand and always has been.

The global shift towards health and wellness has put the entire beer category under pressure. Are we witnessing a radical category culture shift?

There are two things happening, and both are good. One is premiumization and the shift towards more conscious consumption and openness for new propositions, which is good for us because consumers appreciate value and quality. The second is that zero and low-alcohol is growing significantly. Heineken 0.0 has become the biggest zero alcohol beer in Europe. The beauty of 0.0 is that it is a healthy alternative for alcohol—and it’s completely natural, not sweetened, and low in calories.

Today, consumers expect their brands to take a stand and have a purpose. How are you managing this at Heineken?

We have defined that quite clearly for ourselves. The purpose of our brand is to bring people together over beer. That is about inclusiveness and diversity. We often say here: we see differences in people as a reason to party, not as a reason to fight. But we do sell alcohol, and here we have a big responsibility.

We have very explicit communication and activities to promote responsible consumption and never drinking and driving. We have chosen to use the power and tone of voice of the brand to influence people’s behaviour. We invest 10% of all media money in “Enjoy Heineken Responsibly” and “When you drive, never drink” campaigns. It’s a positive approach to making moderation and not drinking and driving cool. If we get it right, consumers appreciate our brand even more.

Interviewed by

GRAHAM STURT, VBAT

MARK VAN ITERSON
GLOBAL DIRECTOR OF INTEGRATED DESIGN
HEINEKEN
Swapfiets, the bike with the distinctive blue front tire, is one of the fastest growing brands in the Netherlands. For those who don’t know Swapfiets yet, it’s a service aimed at “urban professionals” that gives you your own high-quality Swapfiets bike for a fixed amount per month. This price includes bike repair, maintenance, and replacement in the event of theft. If your Swapfiets bike breaks down, it’s guaranteed that you will get the bike fixed or receive a replacement within 1 day, at a location of your choice. This service concept, which fits seamlessly into the present time, was invented by four guys from Delft. They saw that people like having a bicycle, they don’t like the hassle of maintaining and repairing. To distinguish themselves, Swapfiets chose to give all of its bicycles a colored front tire – in, of course, a distinctive Delft blue.

Swapfiets is celebrating its five year anniversary this year, and is experiencing strong growth. In the past two years, terms of the number of Swapfiets bicycles in service has increased from 20,000 to 140,000. The company has expanded beyond the Netherlands (where it is active in around 30 Dutch cities) to operate in Belgium, Germany, and Denmark. And who knows? In a few years there might also be Swap bikes on campuses in the US and beyond.

FROM PRODUCT FOCUS TO BRAND FOCUS

Swapfiets started from a product focus and grew fast. While Swapfiets actively sought out press, the vast majority of their customers came from word of mouth. Right from the start, all the basics were well-organized: customers believed in the product and service, and were happy to share their own positive experiences. After a considerable period of expansion and investment, it soon became time to start thinking about Swapfiets as a brand. Swapfiets began by asking itself questions such as, “How do we show consumers that we are more than just a product?” and “How do we ensure that people stay with us and feel connected to us?”

Today, Swapfiets’ motto is, “Do what you like, we’ll do the rest.” This refers to the larger brand mission of Swapfiets: to be a facilitator of sustainable and livable city life – by providing a product that lasts, one that is repaired and reused. Swapfiets contributes to better city life by putting more safe bicycles on the street, and by reducing waste from orphaned bicycles.

Research remains very important in everything that Swapfiets does. Not only does Swapfiets have an enormous wealth of their own data that they continuously analyze, they also regularly conduct qualitative and quantitative research. This is characteristic of the success of Swapfiets. It is a company that acts on the basis of the knowledge that they have, but certainly also adjusts where necessary. This is reflected not only in the design of its bicycles - which get adjustments every quarter to make them even better – but also in Swapfiets’ desire to make its customers and employees even happier.

Recent innovations have included improvements to the development of the traditional bike itself - but also the expansion of Swapfiets’ offer into the realm of e-bikes.

Swapfiets’ continuous evolution is also evident from the structure of the organization itself, and how its expansion across Dutch cities and abroad has proceeded. Customers are different everywhere, and Swapfiets wants to meet their distinct needs as much as possible.

Swapfiets sees itself as a local player in every country; its flexible organizational structure fits well with this goal. The idea is to combine elements of centralized efficiency with local benefits and execution. In every city where it launches, Swapfiets works with the same starter package (“plug & play”). This strategy contains materials for store openings, press invitations, documents for discussions with local stakeholders, as protocols for working with influencers – as well as playbooks for the use of local activations such as pop-up repairs, events, and conferences. In this way, the head office facilitates Swapfiets’ international campaigns, but these campaigns are ultimately executed locally.
Swapfiets realizes that every culture has different needs, and adjusts the marketing mix accordingly. To be locally relevant, Swapfiets works in every country with a local marketer who is the eyes, ears, and hands for the brand. For example, while people in the Netherlands ride because of a deeply ingrained national habit, biking on a shared bike has very different motivations in Germany and Belgium. German customers, for example, choose Swapfiets because of safety, whereas in Belgium they do so because cycling is seen as hip and green. Dutch people easily take out a subscription online, while our Eastern neighbors prefer to first check out the product in shops and showrooms before they commit to a subscription. Danish people, meanwhile, have proven especially responsive to influencer marketing.

EMPLOYEES ARE AMBASSADORS FOR THE BRAND

As part of its decentralized organizational structure, Swapfiets also works with a local regional manager and a number of city leads in each new region. Additionally, every city has its own pool of local “swappers” (that is, the staff that drives around in the Swapfiets service cars, and those who are in the store). It is these swappers who have to win the trust of consumers in new markets. Swapfiets recognizes the important role of its own employees, and it invests heavily in its staff. For example, every employee receives multiple training sessions on how Swapfiets works and how they should perform their work properly – as well as on what to say, what the brand stands for, what they are wearing, how to behave, etc. This is how swappers become true ambassadors for the brand.

WHAT CAN OTHER BRANDS LEARN FROM SWAPFIETS?

1. Talk to your client. Find out what’s important to them. Use this (and other available data) to improve your product, service, or offer.

2. Talk to your employees. High employee satisfaction not only ensures a flourishing organization, but also has a one-to-one effect on your customers. In addition, employees know your company like no other, and you therefore have an inexhaustible source of knowledge and creativity in-house.

3. Keep investigating new possibilities and show dynamism. Continue to look critically at yourself and at the need to innovate. Are there other products or markets to tap? Either way, thorough research must always be at the basis of these decisions.

4. Do not ask for attention yourself, but make sure you deserve it. Make sure that you are relevant; determine what is relevant for your customers, media, and journalists, and think about how you can make news that way. For Swapfiets, this means remaining relevant from a service point of view. They do not sell bicycles, but rather the service carefree bike riding. In everything they do, they return to this core. Make sure there is room to adjust your message and marketing mix locally if necessary.

NADINE NOOTEBOOM
MARKETING DIRECTOR
SWAPFIETS

Interview by Emmy Brand and Stefan Rutten. Edited by Emmy Brand and Monique van Breda.
Imagine you want some advice on what TV show to watch. Which person would have the most impact on you: your best friend, or the neighbor down the road? And when would you be most likely to fully engage in a conversation on the subject: in a train during rush hour, or on the couch at home? These questions are clear examples of why context matters. The better the context, the more likely you will listen and remember. This philosophy used to be common sense in marketing. Especially in the Eighties, context was a hot topic that was much written about. However, with the strong rise of programmatic and audience-based media buying, advertisers largely forgot about the crucial importance of context. Not surprisingly, this has led to some embarrassing advertising moments and has made "brand safety" one of the buzzwords of the last years.

In a world where we see advertising impact declining, ad blockers on the rise, and automated buying algorithms taking over from human thinking, it is more and more important to focus on the quality of advertising (not just its quantity and cost). Luckily, marketers have seen the light again, because there has been a significant rebirth of the importance of contextual advertising. In a recent study by WARC, some 61 percent of marketers say that context is now even more important than costs!

61% OF MARKETERS NOW FIND CONTEXT MORE IMPORTANT THAN COSTS

Source: The Marketers Toolkit 2019, WARC

Again, it makes sense that context is seen as a crucial element within media planning. In numerous scientific studies, the impact of context has been proven. A recent meta-analysis across many such studies revealed that there are three key context factors that impact advertising effectiveness: 1) media involvement; 2) congruency between brand and context; and 3) appealing media content. As an industry, we need to quickly move beyond reach and impressions, and ensure that context remains a key element in planning choices and buying algorithms.

This is exactly why MediaCom, GroupM, and Kantar have joined forces to apply the renowned brand equity study BrandZ™ to media brands in the Netherlands. By doing so, we now have insight into the brand strength of 68 unique media brands across five different media categories. This led to a Brand Strength score for each individual media brand. This score was then combined with industry reach figures to create the Influence Index score on which our media brands are ranked. We believe that this new Influence Index will help marketers better select and plan their media strategy by understanding which media brands best connect with Dutch consumers. In the process, advertisers can select the contexts and media brands that make the most sense for them.

That marketers are once again embracing context as a key criterion in their media plans is great news. And the fact that we now have a huge brand equity database for 71 media brands makes this news even better. We can’t wait to work with you to maximize the benefits for your brand or company.

KEY RESULTS

1. GOOD THINGS COME FAST

Netflix has been in the market for only 6 years, but already ranks as the top media brand. Although Netflix is not even in the top ten among media brands in the Netherlands in measures of Reach, it has such a strong Brand Strength rating that it still outperforms all other brands in the overall Influence Index ranking.

2. NOS IS THE STRONGEST DUTCH-OWNED MEDIA BRAND

In a time where there is a lot of debate about the image of news media, our BrandZ™ study shows that the future could still be bright for news brands. Indeed, one of these brands, NOS, was even able to enter the Netherlands’ top three, accompanying entertainment media giants like Netflix and YouTube.

3. VIDEO PLATFORMS DOMINATE THE TOP TEN

Video platforms occupy six out of the top ten media brands in the Netherlands, in a strong testament to the strength of this category (which overall placed 13 brands in the Netherlands’ Top 30 media brands). These brands performed well thanks to a combination of highly positive consumer attitudes and high Reach. Another interesting insight: if we strip Reach out of the equation and solely look at Brand Strength, the top three video brands in the Netherlands are all non-traditional video platforms: Netflix, YouTube, and Videoland.

4. SOCIAL PLATFORMS HAVE WORK TO DO

Only three social platforms have been able to find their way into the Top 30: WhatsApp, YouTube, and Facebook.

5. GLOBAL MEDIA BRANDS RULE

Global media brands rule their categories, both in measures of their overall Influence Index as well as in measures of Brand Strength. What’s more, four out of the top ten media brands in the Netherlands are global players. And if we look at the top five media brands in measures of Brand Strength, global brands become even more prevalent, with Netflix, WhatsApp, Spotify, National Geographic, and YouTube capturing these top spots. Importantly, these brands represent four different media categories—which shows that media brands of many different types can provide great advertising context for their partners.
# Top 30 Media Brands

RANKED BY THE BRAND INFLUENCE INDEX

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<th>RANK</th>
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<td>1</td>
<td><strong>NETFLIX</strong></td>
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Top 5 Brand Strength

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TOP LESSONS FOR ADVERTISERS

As outlined in the introduction to this special section, it is important that advertisers take context into account to improve campaign effectiveness. Of course, the “right context” is a broad concept. It can mean, for instance: focusing on media with a strong relationship with its users; ensuring that your message is displayed in the right Umfeld; or matching the mood of your ad with the mood of your consumers. To illustrate the broad application of this study for advertisers, we will highlight how its results can help to improve contextual advertising in three ways:

1. THE RIGHT FIT BETWEEN MESSAGE AND MEDIUM
   Whether the message of an ad is about sustainability, trust, or another elemental advertising theme, one thing is for sure: when that message is consumed in a relevant and fitting context, it is better processed and thus realizes more impact. So it’s extremely important to consider how well a media partner is perceived across these core advertising themes. With this study, we were able to compare media brands across a huge number of dimensions. We have highlighted four core attributes that correspond with popular campaign themes and brand objectives, and identified the top performing media brands across these attributes.

   • Creative: Video is the category that ranks highest on creativity, while news media is the lowest. Looking at the top three brands, we see a mix of media categories, with Vtwonen, Pinterest, and YouTube claiming the top spots in that order.

   • Fun: When it comes to Fun, the audio category has the strongest position, surpassing even video brands in this area. On an individual media brand level, Donald Duck outperforms all others, followed by Comedy Central and YouTube.

   • Idealistic: Between categories of media brands, we don’t see huge differences in perceived Idealism. However, we do see clear distinctions on the individual brand level. For instance, the news dailies Trouw, NRC, and De Volkskrant are all in the top four, while AD and De Telegraaf score way lower in the rankings for Idealism.

   • Trustworthy: One of the dimensions with the largest differences between categories is Trustworthiness. News media brands outperform all other categories on this attribute, with only video getting close. In contrast, negative headlines about Facebook have clearly had an impact on the Trustworthiness of social platforms: the social category ranks lowest for this attribute, and Facebook and Snapchat are in the bottom four brands for Trustworthiness (while six social platforms are in the bottom 11 brands for this attribute).

2. THE RIGHT FIT BETWEEN BRAND AND MEDIUM
3. THE RIGHT FIT BETWEEN AUDIENCE AND MEDIUM
THE RIGHT FIT BETWEEN BRAND AND MEDIUM

At MediaCom, we have done many studies on the impact of branded sponsorships. One of the key elements for success here is the fit between the brand itself and the sponsored item or program. The better the fit – that is, the more natural the sponsorship is – the more likeable the partnership will be, and the more impact it will have. You can think of this dynamic as akin to two people meeting each other: the better their characters match, the more likely it will be that they have a good time. One thing BrandZ™ can do is help to match the characters of brands with media partners. This is done by identifying a brand’s personality attributes, and fitting it into one of 10 archetypes (for which there are corresponding media brand partners that share these archetypes). We have highlighted four of those personality archetypes, and matched each with media and consumer brands in the extensive BrandZ™ database. Doing so reveals, for instance, that a Rebellious media brand like VI would be a great match with brands like Desperados or EasyJet. In the same way, we could match NPO with brands like Douwe Egberts or Volvo.

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<th>ARCHETYPE</th>
<th>MONARCH (IN CONTROL / ASSERTIVE)</th>
<th>NURSE (GENEROUS / CARING)</th>
<th>REBEL (REBELLIOUS)</th>
<th>WISE MAN / WOMAN (WISE / TRUSTWORTHY)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Media brand</td>
<td>NRC</td>
<td>Libelle</td>
<td>VI</td>
<td>VI</td>
</tr>
<tr>
<td>Ideal partner</td>
<td>ABN-AMRO</td>
<td>SINGAPORE AIRLINES</td>
<td>DE</td>
<td>NPO 1</td>
</tr>
<tr>
<td>Ideal partner</td>
<td>Allianz</td>
<td>SPA</td>
<td>easyJet</td>
<td>VOLVO</td>
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</table>

THE RIGHT FIT BETWEEN AUDIENCE AND MEDIUM

A final dimension of “advertising in context” is ensuring that a media brand has the right authority or meaningfulness for your target audience. We know from readership research that the stronger the bond is between an audience and a media brand, the more attention they pay and the more time they spend with content from that brand. Therefore, this bond will have a clear impact on the effectiveness of a campaign. Identifying a media brand’s strength across different audiences is thus a key element to building smarter media plans.

For example: we looked at the age groups 18-34 and 55-65, and identified the brands for which we saw the biggest differences in favorability between the two audiences. We found that Netflix, Instagram, and Spotify had a much greater brand strength amongst youngsters than they did amongst the 55+ set. Conversely, from the perspective of our 55+ respondents, brands like NPO 1, Radio 2, and Facebook score much higher than they did among younger consumers. The trend of youngsters turning away from Facebook and switching to Instagram is clearly reflected in these results.

Do keep in mind that a relative high score for 55+ consumers doesn’t have to mean that a brand is performing poorly in an absolute sense among the younger set. For instance, Facebook is still the number 13 brand amongst 18-34 year olds, and its Reach is actually higher in this age group than among older users. However, Facebook is the number three brand in overall measures of brand strength for 55+ consumers, so we can nevertheless say that Facebook generally performs better with older consumers.

NETFLIX

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TOP 3 DIFFERENCE 55+ VS 18-34
IN FAVOR OF 55+

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TOP LESSONS FOR MEDIA OWNERS

This study has a high added value for media owners as well as advertisers. An equity study like this one can help executives understand how their media brand performs compared to competitor brands - as well as understand how this performance differs amongst audiences; how strong a brand’s profile or signature is; and, most importantly, how to implement actionable recommendations that can help regenerate a media brand. Here are three topics to demonstrate the richness our survey data holds for media owners.

IDENTIFYING BRAND STRENGTH FOR DIFFERENT AUDIENCES AND BUTTONS TO PUSH

Understanding what makes a powerful brand in your category, and how your brand performs compared to competition, can help you focus on the right growth factors. To illustrate this, consider the audio category, and more particularly Spotify. The brand manages to score above the average score of 100 on our three key equity drivers: Meaningful, Different, and Salient.

What’s more, BrandZ™ enables us to dive deeper into the drivers behind these three success factors, which in turn helps to determine actionable recommendations. For example, examining into the brand attributes scores shows that elements like Ease, Distinctiveness, Superiority, and Prestige are all key drivers of high Meaning scores in the audio category. Spotify performs above average on all these key drivers, which accounts for a Meaningful score that’s 29 points above the global average. In the brand typology of BrandZ™, this makes Spotify an Iconic brand: a well-established brand that has the ability to create even more value by growing demand and commanding a premium price.

Does this mean Spotify can lean back and simply keep up with their good work? No, because BrandZ™ also reveals two possible areas of vulnerability for the brand: Trust and Audience. Trust is an important driver of both Meaningfulness and Salience. Spotify scores below average on Trust, a trend that we’ve seen among many global media brands operating in the Netherlands. Increasing trust could therefore help Spotify further strengthen their position. Secondly, in the realm of Audience, it turns out that Spotify’s high brand scores are very much reliant on their strong performance among the 18-34 year old audience. By increasing its Meaningfulness and Salience among consumers aged 35 and up, Spotify could strongly increase its brand strength.

<table>
<thead>
<tr>
<th>BRAND STRENGTH INDEX</th>
<th>TOTAL</th>
<th>&lt;35 YO</th>
<th>35-54 YO</th>
<th>55+ YO</th>
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</thead>
<tbody>
<tr>
<td>MEANINGFUL</td>
<td>129</td>
<td>242</td>
<td>156</td>
<td>149</td>
</tr>
<tr>
<td>DIFFERENT</td>
<td>166</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>SALIENT</td>
<td>111</td>
<td></td>
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</tr>
</tbody>
</table>

| Spotify              | 178   | 242    | 156      | 149    |
Remarkably, Spotify’s main worldwide competitor, Apple Music/iTunes, is in the bottom 4 when it comes to Brand Strength in the Netherlands. The brand has notably low scores on both Meaningfulness and Salience. Looking at some of the most important drivers behind these metrics, Apple Music does not manage to meet the category average on attributes like Ease and Superiority, which means their current offer is not sufficiently easy to use, nor is Apple Music seen as a brand which is the best at what it does. This places Apple Music at further risk of losing audience share in the future.

PREPARING FOR THE FUTURE: THE RISE OF AD-FREE SUBSCRIPTION MODELS AND FALL OF GOSSIP PRINT MEDIA

To get a glimpse of what consumers expect to become more and less relevant in media, it is interesting to see how different brands are rated on “gaining importance in the future.” Four out of the top five brands that are expected to become more important in the future are ad-free, subscription-based media brands, with Dutch brand Videoland ranking among four big global brands (Netflix, Spotify, YouTube and WhatsApp). Looking at the bottom five, we must conclude that consumers do not foresee a bright future for print media – especially more gossip-minded print media outlets, with both Story and Privé landing in the bottom five.

MAGAZINES HAVE A CLEAR POSITIONING

Not only can we define brand character for each media brand – we can also measure how strongly a brand is associated with that character. This is reflected in the Character Clarity Score. The higher the Clarity score, the more outspoken the positioning of the brand is. When looking at individual brands, NPO 1 again ranks high, followed by Donald Duck and LinkedIn. Even beyond Donald Duck, magazines as a category place well on the Clarity score: six out of the top ten brands are magazines.

With special thanks to Jasper Bronner, Business Science Director at MediaCom, Inge Monsees, Team Lead Business Science at MediaCom, Marjon van Diepen, Insights Director at GroupM and Guido Pauw, Manager Marketing and Services at GroupM.
05 Brand
Building Best Practice
HOW TO MAKE YOUR BRAND GREATER THAN THE SUM OF ITS PARTS

Every company is unique in its brand proposition, but all are moving towards the same North Star goal: a consistent experience across every channel, wherever and whenever a customer comes into contact with the brand.

This is a big challenge. How can companies both deliver fast revenue growth and take measured steps towards their greater brand vision?

Invariably, great customer experience means awesome branding. But it also means a hyper-relevant, imaginative journey for every individual, with the right messaging that’s based on personal preferences and triggered by behavior. A journey that captures attention, converts that initial sale, and ultimately wins and sustains customer loyalty.

What I often hear from commerce brands is that teams focused on Customer Experience (CX) – whether they sit in marketing, service, or sales – find themselves thinking too much about their technology roadmap to deliver this connected stand-out experience.

Their CMOs and CTOs understand that a connected or cloud-based ecosystem brings real big-picture benefits to their business, through empowering teams to steer the customer journey in a unified direction. And yet the teams themselves - from department leads to channel specialists - still need to find the space to focus. They often spend more time searching for data orchestration solutions across their internal organizational silos, than on realizing their brilliant personalized brand communication ideas.

The reality is that they could be making manageable steps towards their long-term customer experience goals, whilst making their lives easier by automating repetitive work and proving incremental business value.

Adding the “wow” factor to your customer journey

Your customer’s journey depends on whether you sell socks or power drills – it’s a different buying roadmap. You need new socks every five months, but you need a new drill every five years. Despite these differences in customer touchpoints, critical engagement moments, and next-best-product recommendations, every customer-driven company still wants to work from a similar playbook of tactics to reach their respective goals - in a sequence that makes sense for them, of course.

For example, most marketers want to reduce waste by making personalization happen at scale - taking customer interactions and turning them into smartly orchestrated messages and campaigns. But this is no easy feature.

Another example: all customer service connoisseurs want a single profile for every customer, to understand their browsing and buying behaviors. And then they want to pinpoint predictions for future purchases or potential churn. What, though, are the smaller steps to get there?

In addition, everyone wants these various insights to talk to one another across teams and technologies. Take a fashion brand, for example, building smarter campaigns and customer service initiatives through applying data such as a customer’s eye color, their hairstyle, and their personal suit-fitting preferences across all messaging – via customer chat, web, email, and mobile app.

Trying out these personalization tricks requires teams to navigate new frontiers, with sequential storytelling that adds up. It takes time, and creativity, and a deep understanding of both brand and customer.

Customer experience baby steps, which are built for bigger things

Making sure that companies scale new customer experience frontiers takes a clear success roadmap in tandem with a brand’s storytelling.

What should these first baby steps consist of when setting up for your CX goals?

1. Have a shared vision of the desired customer journey (s) throughout your company. Redefining the customer journey often touches different departments with different sub-objectives, so it’s especially important to break down those silos and collectively understand your greater north star goal.

2. Customer first actually means - centralize your customer data, order and product data. This means making sure that both the technology and the orchestration capabilities are in place to deliver on your customer experience goals.

3. Adopt the new way of working that your brand and customer experience visions require. In order to be more agile and self-sufficient, teams often need to redefine their internal processes and introduce new adoption frameworks and collaborations into their daily work.

Begin thinking and doing in these principles, and your brand will become greater than the sum of its parts. This will be true not only for you and your marketing, services, and sales teams, but for those who should define and shape your brand in the first place – your customers.

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Emark builds omni-channel solutions by implementing, integrating and activating the best fitting marketing and advertising technology stack. We put analytics in place to make marketing results and media spend transparent and objective.
MARKETERS: BE CONSERVATIVE!

I often catch myself on it that I’m singing a brand jingle out of the eighties: “Oeh oeh, ah ah, we maken Domo vla.” “Yogo Yogoaa,” “Miauw miauw, miauw miauw, miauw, ‘C&B, is toch vroedseliger!”… We’re over 30 years ahead now, and I still know them, because they were so simple, and they seemed to be used for years! Douwe Egberts must have recognized the same – that consumers still know their old commercial song: “Je bent thuis waar je Douwe Egberts drinkt!”, because the brand has reused its old jingle in their newest commercial recently. This is smart.

The power of brand assets

We are talking about brand assets. In this world, in which we are bombarded with brands and messages, it is challenging for a brand to be noticed and to stand apart, all while conveying why they are the right choice for the consumer. The language of instant recognition and meaning is vital for brands to understand, embrace and mobilize to their advantage. It’s about providing consumers with mental shortcuts to ensure a brand is top of mind at the time when purchase decisions are made. Mental shortcuts are the linking pin between “mental availability” (coming to mind easily) and “physical availability” (being visible on different touchpoints and point of sale). In fact, they are one of the fundamentals of a brand, and should be treasured by marketers.

It seems so logical, but there are plenty examples in which we see that marketers forget to exploit a powerful brand asset – as well as examples in which marketers think they’ve created a new strong brand asset that is actually not recognized by consumers at all. That’s why we say that when it comes to brand assets, marketers are better off being conservative, because brand assets need to become imprinted in consumers’ brains for a long time to be effective.

The 3Cs of brand assets

Brand assets may include, but are not limited to: logos (think Apple), colors (think Andellon purple), fonts (Disney), packaging (Coca-Cola bottle), the shape of a product (Sonos speakers), mascots (Robijn teddy bear), shop designs (McDonalds restaurants), slogans (Kruidvat, steeds verrossend altijd voordelig), music (Hornbachs “Kama-joa-jipie-jipie-jipie”), and celebrities (George Clooney for Nespresso).

There are 3 principles around the good use of brand assets:

1. Clarity: Think simple shapes - i.e., those that are easy to draw yourself – short taglines, and a clear connection with the brand. The connection of top fashion models to the brand L’Oréal is very clear. In contrast, the connection between the old Philips tagline “Sense and simplicity” and the Philips brand was way too abstract.

2. Consistency: Being consistent over time seems easy to accomplish, but too often a marketer on a brand gets rid of a strong brand asset because he wants to “renew” the brand and make a personal mark. Now, freshening up a brand logo is fine – we call it “keeping up with the times, conservatively.” Ultimately, consistency is also about using your brand assets smartly across different touchpoints. It is better to have multiple strong brand assets, so that you can use the most effective ones suitable given the type of touchpoint. Longer slogans are not effective on billboards, for instance (a large logo would be better), but may be used effectively in radio commercials.

3. Communication: This is about reinforcing relevant brand purpose, principles, and messaging. Think of your brand assets as mini opportunities to invoke reminders of key messages. In the wintertime, Chocamal has single letters on its packs, and in the Sinterklaas period the packs are used to make nice words and phrases on billboards, posters, and POS material. That’s a powerful way to make use of a single brand asset.

Not all brand assets are as evocative

Research on brand assets has pointed out that not all brand assets are as evocative. Shapes and colors can combine to act as a powerful cue to consumers. Think of how the blue ellipse is clearly recognized as a part of the Samsung logo. Logos are also easily recognized, especially logos that are built of the initial letter(s), like the G of Google and YSL for Yves Saint Laurent, or logos that have a clear shape directly linked to the brand, like the apple for Apple.

Slogans are not as comparatively strong in instantly evoking a brand. That’s because many slogans don’t follow the rule of being clear or being consistent over time. A slogan should clearly reflect who you are or in which category you are acting – like “Nokia, connecting people” or Lipton’s “Be more tea.” They should not involve an (often abstract) mission, such as “In search of incredible” for Asus or “Life’s Good” for LG. After having used many different slogans, Bavaria found that - of all times - their most powerful slogan was “Zo, nu eerst een…”, and they reused it in their newest ads.

Celebrities generally perform poorly, especially over the long term. They can generate PR and buzz in the short term, like Sara Jessica Parker did for Blokker, but that does not necessarily enhance a brand’s strength. The personal values of the celebrity should perfectly match the values of the brand. George Clooney is ideal for Nespresso thanks to his sophistication. What’s more, a celebrity should be used over a long period of time in order to be properly linked to a brand. Otherwise endorsements are simply an expensive short-term marketing execution.

Marketers: be conservative!

In summary, marketers should keep in mind that brand assets are the foundation of a brand, and should be treasured. Here are five recommendations to that end:

1. Investigate which assets are strong. Do consumers recognize AND assign your brand asset correctly to your brand?
2. Change is fine: keep up with the times, because the market context may change as well. But be as conservative as possible.
3. Use your brand assets wisely on different touchpoints. Make sure you have a set of assets that are suitable for different touchpoints.
4. Focus on the 3 Cs of Clarity, Consistency, and Communication.
5. Anchor your assets within the organization. Protocolize it in your creative briefs and design briefs to stick to your most powerful brand assets.
REAL GROWTH IN THE NEW ECONOMY

During the postwar economic boom of the last six decades, many businesses relied on scale and efficiency tactics to sustain their growth. Today, however, these patented processes are starting to fail as companies hit the limits of how many markets they can enter and how many expenditures they can cut. Moreover, an increasingly knowledgeable and conscientious customer base is challenging brands’ licenses to operate, while disruptors are tearing down barriers to entry and bypassing well-established niches and intermediaries. These days, no source of growth is guaranteed.

However, growth still exists – albeit in uncomfortable places. By exploring unexpected partnerships, embracing specialty brands, and implementing new business models, forward-thinking marketers have already sketched out a new growth architecture. But this is only the beginning. To continue delivering sustained top-line growth, companies must truly reject the tired formulas of the past and develop an architecture for “real growth.”

First, growth leaders reimagine what they offer and what markets they sit in. They assess market developments with a wide-angle lens that leaves no growth source unexplored. Rather than see a 30% category share in as a laurel to rest on, growth leaders redefine their markets until they are 3% players in more broadly defined market spaces, with visionary plans to eventually capture even larger slices of much larger pies. From there, they play checkers and chess simultaneously, optimizing what works while identifying and embracing new business models. They build in-house innovation labs and explore unexpected acquisition possibilities. They then use these perspectives and capabilities to deliver unique, ever-evolving experiences. Rather than chasing ephemeral customer satisfaction, they embrace the fact that customers are, in the words of Jeff Bezos, “always beautifully, wonderfully dissatisfied.”

Second, overperformers rethink how they organize themselves. They rewrite cultural scripts, loosening the bonds of procedure and structure in favor of innovation, entrepreneurship, connectivity, and diversity among decision makers. They then carry this cultural openness into their organizational structure: rather than acting like large, hard-to-steer oil tankers, they act like flocks of birds, moving as seamless formations towards a common goal while anticipating opportunities and threats. Growth leaders foster whole-brain teams to produce whole-brain insights, combining creativity, data, and technology to innovate where others are complacent.

Finally, growth leaders challenge assumptions about why they do what they do. Rather than prioritizing profit, they accept that real growth stems from a human-centric approach. They focus on tangibly benefitting their customers, their colleagues, and their communities. They recognize that innovative market definitions, consumer experiences, or organizational cultures can and will be adopted by competitors. To continue to stand out in authentic and inspiring ways, growth leaders go a step beyond and tie their ambitions to something truly meaningful.

While these principles form a strong base for future growth, they are not enough on their own. Our study has shown that real change will not happen in an organization that only sees these principles as feel-good slogans or temporary solutions. To make sure they become more than that, leaders across functions must take a stand, demonstrating humility, passion, courage, and a willingness to empower their teams. Only then can they drive “real growth” across the business.

The Institute for Real Growth (IRG) is focused on helping growth leaders measure and drive sustained, long-term “real growth” by connecting growth leaders to peers and expertise through live-action programs.
I had just returned from my holidays and was feeling the effects of jetlag and an empty stomach when I jumped on my racing bike. While before holiday I could easily kick away lots of watts, it just didn’t work out the day after my return: 25 minutes in, I was forced to slow down and take a lower pace. Despite having momentum before the holidays, now it simply did not work.

And guess what? The same thing happens to brands. Despite ambitions, plans, or good results from the past we see that many brands have struggled to keep the momentum going for them. We recently compared 3,900 brands that grew or declined over a three-year time frame. And we found that while 6% of these brands grew initially, only 6 in 10 of this 6% were able to maintain its growth. Why is that?

Well, it has to do with keeping momentum. When you don’t exercise, or if you have not eaten well, you will not be able to keep up. Many brands fall in into a similar trap. Companies may start out with a long-term vision. The founders have an original idea and they can see how their business will compete effectively within the current market context. But as companies go along that path, they increasingly get drawn into short-term performance and management. Incremental thinking replaces innovation as leaders worry about making the next quarter’s numbers. Companies become more risk-averse. By the time the company matures—if it gets there—the company doesn’t have the vision for something completely different that will drive it forward through the next 10 years. That’s why businesses and brands should strive for a “small company” mentality to maintain a vision of future growth.

Fortunately, there are some great Dutch examples of brands have embraced unique visions of excellence, and have charted their own category rules in order to grow not only today, but also in the future.

**Heineken**, meanwhile, has observed the rise of individual small craft breweries in recent years. And Heineken has decided, rightly, that it could not credibly give the same craft-beer feel to its own (big, global) brands. So instead of fighting the trends, they started Beerwulf: a platform where beer lovers can order craft beer from many local breweries. Beerwulf takes on logistics, platform, shipping, and stock risks. One nice detail: Because Beerwulf knows exactly who is ordering, small brewers can see where their “fanbase” is across the globe. Heineken, for its part, still earns money, as they put a mark up on beer they sell through the platform.

**KLM**, for instance, is now suggesting alternative means of transport for its own services. While KLM acknowledges that we all have to fly every now and then, sometimes there are better alternatives to reach people. For example, by conference call, or a high-speed train. The fact that KLM has become an advocate for these alternatives is unexpected, but it might help its business in the long run, especially if KLM invests in a high-speed train network across borders. And from a branding perspective, KLM gets to position itself as a friendly, responsible, and honest company that is meaningfully different.

Kantar is the world’s leading data, insights and consulting company. We understand more about how people think, feel, shop, share, vote and view than anyone else.
What is a brand in the digital commerce world of today? Is it still as important as it once was, and what will it be in the future? Has the ease, speed, and convenience of online transacting watered down brands’ impact?

These are the questions that keep brand marketers awake at night. Let’s have a look at these questions and see what’s happening to brands in a world where online marketplaces, and not brands, are defining and driving customer behavior.

1. Brands need to change because of online marketplaces and the “thumbnail-ization” of the brand

More and more product searches are taking place on platforms and marketplaces like Bol.com, Zalando, UberEats, and more… with less and less product searches being driven through Google. Because of this, we can say that customer behavior is changing.

Increasingly, customers’ “views” of your brand are done via product searches on marketplaces. What they see is a thumbnail size image of your product and some copy. It’s not much to build a brand on… but it’s all the space you’ve got!

It’s vital for any business wishing to survive that they interpret their brand through the eyes of the marketplace consumer – starting with that thumbnail image.

2. Brands need to change because customers are increasingly loyal to services, not brands

Jeff Bezos has, in the past, claimed that customers are only loyal to Amazon up until the point that someone offers them a better level of service.

Two of the most important factors in online purchasing are price (96 percent) and fast, more convenient delivery (84 percent). In 2019, “brand equity” is no longer enough. Increasingly, the intangible and the emotional values of a brand are being replaced in importance with the measurable. If customers can get an alternative quicker, and cheaper, they probably will.

Why is this relevant to brands? To survive in world dominated by e-commerce, brands must place less concentration, budget, and investment on brand equity. Instead, they must focus more on service and service innovation.

3. Brands must change because they need to make DTC work, even if marketplaces are on the rise

The marketplace numbers in Wunderman Thompson Commerce’s Future Shopper 2019 survey appear to paint a challenging picture for brands wishing to interact directly with their customers. Some 62 percent of them are excited about ordering all of their goods through one retailer.

However, brand websites should not be ignored by savvy managers. In fact, a third of customers told us they go directly to brand websites during the inspiration stage of their shopping journey. Later, though, as customers move from inspiration to search, the number dips to 29 percent going to brand websites - and then drops to 15 percent when it comes to the purchase itself.

Brands should be looking at how to convert this initial interest and search into sales, thus retaining more customer relationships and customer data.

4. Brands must change because voice is just the start — zero UI will change all

Voice assistants are just the start of the zero UI revolution. This new era will include gestures and the brain-computer interface (BCI) — as well as the concept of the no interface at all… that is, “Programmatic Commerce.”

Brands have historically worked through awareness, recognition, and the decision of consumers to buy them. But what happens when it’s not the consumer making the decision? What happens when it’s a computer? Or an algorithm? Nielsen data indicates that 20 percent of all online spend is already allocated via subscription.

The fear for brands is that the people they are emotionally influencing will be replaced by unemotional data. And, therefore, consumers will have fewer relationships with brands. The days of automated purchasing and automated brand interaction are almost here, and this has huge implications for brand builders.

5. Brands will have to change to become omnichannel and innovative

It appears that no brand, or retailer for that matter, will survive without being omnichannel and innovative. In our recent survey, 50 percent of online consumers said that they wished brands and retailers were more innovative. More than half the Generation Z we surveyed (53 percent) also indicated that they would prefer to shop with a brand or retailer that has both a physical store and an online store.

What does this mean for brands? It indicates that brands need to operate efficiently and effectively across channels. It also indicates that just being “me-too” won’t cut it anymore. In order to go directly to brands, customers are demanding a reason, a USP, a differentiated offering, and optimized experience.

6. Brands will have to change their organizations because when the “above line” leads, digital does not follow — it just fails

Despite the digitalization of our consumption, we still find that many organizations retain very traditional organizational structures when it comes to owning the brand.

Modern brands need to be effectively and equally interpreted across all mediums — physical, digital, e-commerce, ATL. And this interpretation across mediums is how customers are judging brands. A great TV ad let down by poor online UX in the purchase phase is an example of an omnichannel own-goal.

What are we saying, exactly? Essentially this: you need to look at your brand through the lens of an online buying consumer!

What’s clear is that brands will need to be more inventive in how they create and retain equity in a world where e-commerce is ever more important.

Brands are not dead, but to rely on the traditional brand equity creation approach will be the end of your brand’s future.
AVOIDING STEREOTYPING IN ADVERTISING PAYS OFF

In leading countries around the world, quality of life for women and minorities has never been higher, even as there remains a long way to go. In the Netherlands, the future agenda for improving the lot of these groups is somewhat unclear— not because the country has lagged behind in empowering women and minorities, but rather because of the opposite phenomenon: the country has seen itself as a progressive leader for so long that it runs the risk of missing the work that remains to be done.

This is certainly the case when it comes to the portrayal of women in advertising. At the beginning of 2019, Kantar NL launched an AdReaction report called “Getting Gender Right.” When scrolling through the results, it’s clear that in the broadest outlines our industry is doing OK on gender. Sure, there are ways that advertisers could improve portrayals of men and women, but these can easily be seen as minor issues.

But are they really all that minor? At an industry level, we know that many “little” gender discrepancies can soon add up to a big problem. When we look, for instance, at campaigns that have won awards at Cannes over the past 10 years, we see males have 7% more talk time in advertisements than females—as well as 4% more screen time. What’s more, males are 62% more likely to be portrayed as intelligent in these ads, which supposedly represent the best our industry has to offer. In light of these statistics, it’s fair to ask: is this gender gap a result of the male-dominated creative industry, or a deeper reflection of our societies’ values? Either way, however, the more important questions should be: Are we truly committed as an industry to narrowing this gender gap? And if so, where should we start?

One reason why we need to make a conscious choice to address this disparity from within is that, perhaps surprisingly, our target Dutch consumers are less likely to be catalysts for change.

In our qualitative research with ordinary consumers, we often get feedback about lack of cultural or sexual diversity in family compositions— but hear less about gender stereotyping. There are sometimes comments about too traditional role patterns, but little comment when males are portrayed as superiority. Indeed, many people do not seem to care about how women are portrayed in ads— especially when the gender stereotypes on display are subtler and seemingly benign. For instance, consider the Jumbo ads where the key character is a slightly clumsy houseman, and the woman is the one working (but is still the domestic authority). We generally like these kinds of commercials, and do not see the problem of their gender portrayal.

Fortunately, the tide seems to be turning a bit. A cauliflower pizza crust campaign for New York Pizza—in which cauliflowers were used as a bikini—resulted in quite a bit of negative press and even evoked a counter-campaign with cauliflower used to depict a woman’s brain. Gratuitously sexual portrayals of women are less acceptable than they used to be.

Nevertheless, many campaigns still portray women quite traditionally as the family member responsible for taking care of the children and the household. Think about the coffee ad that shows a father burning bread in the oven while his wife is away for the weekend, or countless advertisements featuring the helpless husband and the know-it-all wife.

More often than not, advertising serves to uphold traditional role patterns where women take care of the children and men are responsible for most of the family income and financial decisions. Some might say these the current statistics about the division of labor in most Dutch families. But those statistics are nothing to celebrate. While it’s true that more men are reducing their work hours to take care of the kids, women still lag behind men in career advancement, management promotions, and salaries. Women are also more likely than their husbands to reduce their working hours in order to take care of family.

Helpfully, closing the gender stereotype gap in advertising need not be an exercise in pure altruism. Although consumers may not be explicitly demanding more balanced gender portrayals, there’s evidence to suggest that they’re quite receptive to these portrayals when they do exist. We know from “Getting Gender Right” study, for instance, that advertising which portrays both males and females as aspirational or authoritative is more effective at driving long term brand growth— as compared with brand messaging that skew its portrayals of males and females.

So marketers, planners and creative teams: Will you take up the challenge of using advertising to help move Dutch society in a more equal direction? To help create a society which strengthens the esteem of both women and men by portraying them in an authoritative manner? Or do we stick with the status quo, and risk being surpassed by societies we’ve long regarded as less progressive and enlightened than our Dutch ideal?
The upswing of neobanks like Monzo, Revolut, Alipay, WeChat, Nubank, N26, and the likes are widely considered to be a revolution in retail banking around the world. This view is underscored by unparalleled growth numbers that make traditional retail banks look pale.

Downloading a neobank app, however, is quite different from actually using it, let alone making it into one’s primary bank. A recent Kantar study covering ten countries on three continents proved that these neobanks are particularly strong in Brazil, China, and India, where they have established an equal footing with traditional banks. Why do they succeed there? It’s because they tap into the vast number of consumers there that were previously unbanked and underbanked. The impact of neobanks is way less strong so far in developed markets. And why is that? Because consumers in these markets either do not see a strong benefit, or decide to cherry-pick the specific service they want from their neobank (such as free ATM use when abroad), while keeping their traditional bank for most other business.

In the Netherlands, the situation is not that different: challenger banks like Knab, Bunq, or N26 barely put a dent in the retail market. Branding is of the essence here. As in other markets around the world, we see that in general neobanks are liked more than that they are trusted by their own customers. Yes, you read that right: the likability of such banks is bigger than their trustability. Undoubtedly the gap is even bigger when it comes to non-customers judging neobanks versus traditional banks.

All this is important because trust is essential when it comes to banking. This notable difference in customer attitudes may explain why traditional banks in the Netherlands are not yet experiencing any major impact from neobanks in the retail market (similar to the experience of major banks in the UK, France, Germany, Spain, Singapore, and the U.S., as the global Kantar study has pointed out).

Another complication is, can we really consider traditional banks as “traditional” these days? Definitely not. A bank like ING, for instance, is at the forefront of digital retail banking (and not just in the Netherlands). Or how about ABN AMRO, which landed the very popular P2P payment app Tikkie? To rub it in: one might argue that the concept of this app was not new - far from it because it was already introduced by challenger bank Bunq. But ABN AMRO, not the least by applying the strength of its endorser brand, clearly succeeded in challenging the challenger bank on this P2P terrain.

Another example of the importance of branding is shown in our 2019 CX+ report, which offered strong evidence for the “halo effect” that can happen when brands generate positive emotions in their customers. This enables a strong brand promise to outweigh customer experience. We see this effect with Triodos, which ranked highest in perceptions of empowered employees, even though they have no branches and most customers rarely interact with a Triodos employee. This result is all about Triodos being seen as “doing good” in the world and creating the perception that employees are empowered.

A strong brand is imperative for banks in the Netherlands, as it is everywhere. Dutch banks understand that clearly and act accordingly by continuously building their brands. As long as they hold on to this strategy, it will be very hard to beat them, as a successful market entry requires a huge investment in branding and communication.
MADE TO MEASURE: WHY STRATEGIES FOR BRAND GROWTH REQUIRE CUSTOM SOLUTIONS

Among the common challenges faced by brand builders is the fact that all brands are not created equal. Big brands like Shell, Heineken, and Philips have been around for as long as we can remember. Their heritage is well entrenched, and their significant marketing investment over time has established a solid consumer base with high brand attraction and a loyal following. This, in turn, has pushed other small- and medium-sized brands to emphasize different strengths when refining their brand strategies for maximum growth.

In the quest for brand building, we cannot therefore assume that a “one size fits all” approach is relevant to brand growth today. The priorities and challenges for big, medium, and small brands are inherently different, and hence their strategies for sustainable brand growth must reflect these variations.

Recent work done by Kantar and Europanel identified penetration as the biggest driver of brand share growth, with many brands also growing through frequency of purchase. However, the importance of penetration and frequency in driving growth clearly differed by brand size. Small brands that grew their share were more reliant on users switching away from their competitors, while larger brands achieved their growth by increasing business from existing buyers, and by bringing new buyers into the category. So while boosting penetration was key to growth for smaller brands, big brands relied on both frequency and penetration as drivers of growth.

Accordingly, the strategic priorities for brands of different sizes should be different to generate growth:

- Smaller brands should focus more on disrupting and attracting consumers to grow
- Medium brands should encourage existing customers to establish habits, but also need to attract new occasions
- Big brands need to grow their category, as well as make it easy for customers to stick to “auto pilot” habits

Though clear in concept, brand growth will come down to how well companies activate this strategy both in market and in mind. A brand’s strategy should ideally aim to optimize both physical and mental availability to win and sustain share. While physical availability is critical for consumers to access a brand easily, we know from experience on holistic brand guidance that mental associations also play a leading role in predisposing consumers to purchase. A brand’s mental power or equity is typically best leveraged by fueling perceptions of the brand being meaningfully different to others, while also remaining salient enough to trigger these associations while shopping.

For small brands, this means standing out to as distinctive, working to break habits, and disrupting category codes to sway consumers to their offerings. Brand associations need to be unique and well defined to encourage clarity of what the brand stands for. It is vital for smaller brands to build perceptions of difference to encourage sampling and trial. Swapfiets’ unique subscription model for bicycle possession is a good example of disruption in the bicycle rental space.

Medium-sized brands need to ensure they retain what makes them different, but also strive to grow meaningfulness by becoming relevant to more people and meeting more category needs. Dutch brand Mora, which specializes in frozen (usually meat-based) snacks, has demonstrated this by partnering with “The Vegetarian Butcher” to offer plant-based offerings and broaden its user base among vegetarian audiences.

Big brands, meanwhile, need to be salient and drive meaningfulness by staying relevant and reminding consumers what makes their brand special. It is important for big brands to be perceived as innovative and drive new trends within the category. For example, Heineken’s launch of 0.0 (alcohol-free) beer was heavily promoted, building salience and generating perceptions of Heineken as a trendsetter with consumers (even though they were not the first brand to introduce this kind of beer in the Netherlands).

In sum, understanding the brand size is integral when considering brand strategies, and helps lay the foundation on which to chart future brand growth.

Kantar is the world’s leading data, insights and consulting company. We understand more about how people think, feel, shop, share, vote and view than anyone else.

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06 Branding in B2B
THE TYPICALLY DUTCH WAY OF DOING BUSINESS!

A strong brand is important in a B2C environment. But how important is branding in B2B? And does it work to your advantage abroad to be Dutch or to have your main office in the Netherlands?

Royal HaskoningDHV has been a leading engineering consultancy and project management firm for more than 137 years now. In the lobby of this traditional company, bearing a royal predicate in its business name, they have a picture of the royal couple on the wall of the main office. “Typically Dutch,” says Corporate Director Communications & Brand Flip Dötsch with a smile.

THE JAPANESE IN THE NETHERLANDS

Local relevancy is also the reason why Japan’s Yusen Logistics has its European regional head office in the Netherlands. Our country is an important market for this logistic service provider, as well as an important logistic hub thanks to Schiphol and the port of Rotterdam. “But we Dutch are not in the majority at the office,” says Head of Marketing Sanne Visser.

“We work with many different nationalities here. With such a mixed bunch you can’t say we have a typically Dutch culture at the office. In our cafeteria our Japanese staff eat their authentic Japanese food while the Dutch enjoy their sandwiches with sprinkles. Just like us, they are used to work with a kind of polder model, the difference is that you see the Japanese staff work longer hours.

They are very good in meticulously observing a process to make improvements. The Japanese staff often makes jokes about our directness. Although I don’t know what it would be like if we were in Tokyo.”

“The Dutch are direct with a smile. It isn’t painful, it feels more like an arm around you.”

John Dillon

DIRECTNESS WITH A SMILE

The British John Dillon works as Chief Marketing Officer at Dutch software company Exact. He has his own opinion on the directness of the Dutch. “If the British and the Americans are direct, they often get sarcastic. It’s like they want to hurt someone. For me it feels different here. The Dutch are direct with a smile. If feels more like they put an arm around. It speeds up making decisions.”

“What also strikes me is that the Dutch really balance work and life. A lot of my team members have consciously chosen to work fewer hours. That’s something you hardly see in any other country. In most countries around the world people work long hours because they are afraid of what their bosses might think of them. Not in Holland, and luckily so. And it doesn’t seem to affect the productivity. I think it makes for a healthy balance.”

BRAND AS GOLDEN KEY

Royal HaskoningDHV, Yusen Logistics and Exact: all three of them are B2B businesses. And for all three of them, branding is very important. “In a B2B environment your brand is your golden key,” Dötsch says. “It’s about recognizability. People want to know with whom they are doing business. In what kind of company do I invest? Do they live up to good standards? A corporate brand is the vehicle that gets us there, it builds trust and opens doors.”

“A CORPORATE BRAND IS THE VEHICLE THAT GETS US THERE, IT BUILDS TRUST AND OPENS DOORS.”

Flip Dötsch

BUILDING AND LOADING

Yusen Logistics has also set a new course with its project Transform 2025. Says Visser: “We operate in a lot of countries, and up until now our company has been structured by country. Now we want to organize our company more vertically. That’s why we’ve engage in verticals such as healthcare, automotive, technology, aerospace, retail, and food. Branding plays a major role in this. In Asia our brand awareness is already huge, but how can we increase the awareness among potential buyers in other markets? Our goal is to become a world leading preferred supply chain and logistics company.”
**“WE WANT TO BE THE MARKET LEADER AND SPECIALIST IN OUR KEY INDUSTRY VERTICALS.”**

Sanne Visser

“...consistently,” Visser continues. “All parties have to message the brand values, especially in the industries that we are focusing on. In addition, everyone must put forward how we distinguish ourselves from the competition. It is not always about price, we have to highlight (for example) that a pharmaceutical company chooses us because we transport their product on time, in full, to the right place at the right temperature.”

**B2B=B2C**

Exact, in its business of financial software, operates in the Dutch SME market and focuses on small and medium-size businesses. “For smaller companies in particular, there aren’t a lot of people involved in the decision process. And the person making the decision often isn’t a software expert. Therefore our marketing methods and techniques are often similar to those used for consumer brands,” Dillon explains. “It’s very important to have a strong brand. A household name speeds up the selection process. Our reputation that helps clients choose Exact software with confidence.”

**OFFLINE VS. ONLINE**

“The Netherlands has a typical way of doing business. There is more personal interaction with the client,” Dillon says. “Locality is important. Clients want to be understood and they want to be sure that you know and act and develop according to Dutch legislation. You have to be close to them for help and support. That’s why we often literally open our doors for trainings, demonstration days, and meet ups. Every year we organize Exact Live with over 6,000 customers in The Jaarbeurs.”

“At these kinds of events and other trade shows we have made good use of [racing driver] Max Verstappen. His standing power is amazing. Max Verstappen or a Red Bull racing car draw attention at an event, which gives us the opportunity to get in touch with you and start a conversation. It’s a different story in the online world. If people click a banner with Max Verstappen, they expect news on the Formula 1 or a free Max cap. They are not necessarily interested in professional financial software. You have to adopt another approach online.”

**“CONNECTING YOUR BRAND CAMPAIGN WITH YOUR ACTIVATION CAMPAIGN MAKES FOR A PROFIT. YOUR BRAND ALONE DOESN’T SELL anything.”**

John Dillon

Dillon continues: “Connecting your brand campaign with your activation campaign makes for a profit. ‘Click this button to buy.’ People don’t feel an emotional connection clicking an activation button, but they do feel an emotional connection with your brand.

Brand is more the touch level. It’s not yet about selling. It’s about showing who you are as a brand. Which kind of problems can we solve for you? If we message this by playing emotions, you will remember us better. People will not become clients instantly afterwards, but if they need software, they will remember us. Internally it can sometimes be tough to keep this up. Challenging sales targets can often lead to a switch of focus from brand building to near-term activation tactics. It’s the art to balance the two.”

**FUTURE DEVELOPMENTS**

Yusen Logistics’ Visser observes a trend in logistics: “It’s an industry that’s ready for disruption. Uber Freight, that kind of initiatives will come. Since sustainability becomes more important for consumers, new parties will introduce initiatives like for example around alternative fuel and electronic vehicles. I believe the driving forces will come from outside the industry. That represents a challenge for Yusen Logistics. Assets such as boats, trucks and warehouses are not written off that easily.”

“LOGISTICS IS AN INDUSTRY READY FOR DISRUPTION.”

Sanne Visser

Dötsch, meanwhile, believes in better highlighting the company purpose. “Royal HaskoningDHV’s purpose is enhancing society together. We still can do a better job in explaining crystal clear what impact our work has on society. I would like for us to engage more in debates on different societal topics – especially areas where engineering, data science, and technology can be used as a force for good. There’s an ideal breeding ground for that now.”

Yusen Logistics is the insight-drivers, customer-centric logistics partner to global business. We deliver this through an extended range of services from International Freight Forwarding and Contract Logistics, to Supply Chain Solutions and Industry Insights covering the full supply chain. We invest in a deep understanding of our customers' business, their customers, the challenges they face, and the goals they want to achieve. With 24,000 employees covering 45 countries and regions and over 550 locations, we are connecting people, businesses, and communities to a better future every day.

Interviews by Monique van Breda and Hugo Schurink. Edited by Annelies Kant and Machteld Gelderland (Kantar)
07 Resources
INTRODUCTION
A BrandZ™ ranking of brand valuations lists the brands making the largest absolute $ contribution to the total value of their respective parent companies, considering both current and projected performance. This is the true value of brand building and we want to isolate and reward the brands making the largest contributions to the success of their parent companies.

A company may have huge overall business value but the absolute $ contribution made by the relevant brand(s) that the company owns may not be a comparatively large figure – at least not a large enough figure to qualify for the given BrandZ™ ranking of brand valuations.

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™.

THE VALUATION PROCESS
BrandZ valuations isolate the value generated by the strength of the brand alone in the minds of consumers i.e. with all other elements removed.

To achieve this, we calculate and combine two important elements: Financial Value and Brand Contribution.

- (i) Financial Value - the proportion of the total $ value of the parent company that can be attributed to the brand in question, considering both current and projected performance.

- (ii) Brand Contribution - quantifies the proportion of this Financial Value that is directly driven by a brand’s equity. i.e. the ability of the brand to deliver value to the company by predisposing consumers to choose the brand over others or pay more for it, based purely on perceptions. Note: this does not include the proportion of consumers who choose the brand for reasons other than this predisposition e.g. those attracted by price promotions, a particularly prominent display etc. Such purchases are not due to the brand’s equity and so are removed as part of the process.

PART 1: CALCULATING FINANCIAL VALUE IS A THREE-STEP PROCESS

Step 1
We begin with the brand’s parent company, which generates earnings from:

- Tangible assets - (assets with a physical form, which include fixed assets - e.g. buildings, machinery, land & current assets e.g. cash and inventory)
- Intangible assets - (such as patents, trademarks and brands)

Example - Volkswagen AG is a parent company that generates earnings from tangible assets like its manufacturing plants and equipment, as well as its intangible assets - the brand names under which the cars are sold - Volkswagen, Audi, SEAT etc. To determine the proportion of earnings directly derived from the company’s intangible assets we begin with Corporate Earnings - sourced from Bloomberg, which represent the latest annual earnings reported by the parent company. Then by using other financial data from the same source, we calculate and apply a metric called the Intangible Ratio.

By multiplying Corporate Earnings by the Intangible Ratio, we are left with Intangible Earnings, which represent earnings derived from intangible assets.

Step 2
Next, we need to determine the proportion of these Intangible Earnings that are directly attributable to the brand we want to value.

To do this we take the Intangible Earnings identified in Step 1 and apply the Attribution Rate, which literally attributes a proportion of the parent company’s Intangible Earnings to the brand we want to value.

The Attribution Rate is determined by analysis of brand level financial information from the parent company’s published financial reports and other credible sources, such as data from Kantar’s Consulting or Worldpanel divisions.

Once the Attribution Rate is applied to Intangible Earnings, we are left with Branded Intangible Earnings i.e. the proportion of the parent company’s Intangible Earnings that can be attributed to the specific brand in question e.g. this step would attribute a proportion of Volkswagen AG’s Intangible Earnings to Volkswagen, Audi, SEAT etc.
Step 3

The final step is to consider the projected earnings of the brand in question, which measures the brand’s ability to generate earnings in the future and requires the addition of a final component – the Brand Multiple, which is also calculated from financial data sourced from Bloomberg. It’s similar to the calculation used by financial analysts to determine the market value of stocks (Example: 6X earnings or 12X earnings).

When we multiply the Branded Intangible Earnings from Step 2 by the Brand Multiple, we reach the brand’s true Financial Value – i.e. the proportion of the parent company’s $ value that can be attributed to the brand in question accounting for current and projected performance.

PART 2: DETERMINING BRAND CONTRIBUTION

To arrive at the true value of the brand (i.e. the asset in the minds of consumers), we need to quantify its strength relative to competitors i.e. to isolate the Financial Value that is directly driven by its BRAND EQUITY. This allows us to understand the proportion of the Financial Value that is explained by the brand’s equity alone – i.e. the BRAND CONTRIBUTION.

ELIGIBILITY CRITERIA

Each of the brands included in the BrandZ Top 30 Most Valuable Dutch Brands 2020 must meet the following criteria:

- The brand originated in the Netherlands
- And is owned by a publicly listed company traded on a credible stock exchange, or its financials are available in the public domain

Using BrandZ’s unique survey based brand equity model (The Meaningfully Different Framework) we are able to quantify a brand’s abilities in each of these three areas relative to competitors, with a survey based measure:

Current demand = Power
Price Premium = Premium
Future demand and price = Potential

Each of these measures contributes to the proportion of the company’s total value accounted for by the brand’s equity alone – i.e. the BRAND CONTRIBUTION.

PART 3: CALCULATING BRAND VALUE

Brand Value is the $ amount that the brand contributes to overall business value of the parent company.

BRAND VALUE = FINANCIAL VALUE X BRAND CONTRIBUTION

WHY BRANDZ™ IS THE DEFINITIVE BRAND VALUATION METHODOLOGY

All brand valuation methodologies are similar – up to a point. 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 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. 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, constantly. Our on-going, in-depth quantitative research includes over 3.7 million consumers and more than 165,000 brands in over 50 markets worldwide.

What’s the BrandZ™ benefit?

The BrandZ™ methodology produces important benefits for two broad audiences.

- 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.
- 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 fuelling business growth. Since we have been using the same framework to measure these insights, this enables historical and cross-category comparisons.
WE WROTE THE BOOK.

BRANDZ™ COUNTRY REPORTS: ESSENTIAL TRAVEL GUIDES FOR GLOBAL BRAND BUILDING

Our BrandZ™ country reports contain unparalleled market knowledge, insights, and thought leadership about the world’s most exciting markets. You’ll find, in one place, the wisdom of WPP brand building experts from all regions, plus the unique consumer insights derived from our proprietary BrandZ™ database.

If you’re planning to expand internationally, BrandZ™ country reports are as essential as a passport.

BrandZ™ Top 100 Most Valuable Global Brands 2019

This is the definitive global brand valuation study, analyzing key trends driving the world’s largest brands, exclusive industry insights, thought leadership, B2B trends and a look at Emerging Brands.

BrandZ™ Top 100 Most Valuable US Brands 2020

While America is in the midst of a unique economic and political period, US brands remain focused – and continue to thrive. This report demonstrates how consumers reward brands that evolve and deliver meaning over time, while also welcoming innovative game-changing brands.

BrandZ™ Top 40 Most Valuable Canadian Brands 2019

As one of the most moderate, politically stable and diverse countries in the world, Canada has been a bastion for trust, transparency and pluralistic values in recent years. But how is it faring economically? Find out in our first ever BrandZ Canada report!

BrandZ™ Top 50 Most Valuable Latin American Brands 2018

The report profiles the most valuable brands of Argentina, Brazil, Chile, Colombia, Mexico and Peru and explores the socio-economic context for brand growth in the region.

BrandZ™ Top 50 Most Valuable French Brands 2019

France is one of the largest economies in the EU, seventh largest in the world, and has proved itself as being adept at managing change. This new report explores a landscape in transition, and how it’s rich heritage and expertise can help define the path for French brands in the future.

BrandZ™ Top 50 Most Valuable German Brands 2019

Germany has become synonymous with excellence in design and engineering, not just in motor cars... but in other categories that have exported what Germany itself represents. In an uncertain geopolitical landscape and time, find out how diversity has driven growth in this fascinating market.

BrandZ™ Top 30 Most Valuable Netherlands Brands 2020

Netherlands is one of the world’s leading exporters of agriculture, with prime transportation links, and a strong open-market policy. This report identifies what’s driving growth in one of the most liberal and culturally-vibrant countries in Western Europe.

BrandZ™ Top 30 Most Valuable Italian Brands 2019

Modern Italy is no longer just the home of fine art, rich history, and la dolce vita. While Italy hosts some of the most recognised and coveted brands on the planet, this report highlights how Italian engineering, design and creativity are powering world-class Italian brands, both old and young.

BrandZ™ Top 30 Most Valuable Spanish Brands 2019

This new report identifies the key forces driving growth in one of the largest, most influential and dynamic markets in Western Europe, built on centuries-old strengths, and adapting to new and challenging conditions.
Top 30 Most Valuable Dutch Brands 2020

BrandZ™ Top 50 Most Valuable UK Brands 2019
As the UK embarks on a tumultuous period of transformation and uncertainty, this debut ranking explores the UK's most iconic brands, successes, and identifies the key forces driving growth in this market.

BrandZ™ Top 50 Most Valuable Indian Brands 2019
This in-depth study analyzes the success of powerful and emerging Indian brands, explores the Indian consumer's shopping habits, and offers insights for building valuable brands in the world's largest democracy.

BrandZ™ Top 50 Most Valuable Indonesian Brands 2019
This ground-breaking study ranks Japan's most valuable brands, identifies their strengths, and explores the key factors that are driving growth in the market and changes in the Japanese brand ecosystem.

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BrandZ™ 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™ Spotlight on Mongolia
number of international brands to gravitate toward this fast-growth market and make a beeline for one of Asia's hidden gems.

BrandZ™ Top 50 Most Valuable Japanese Brands 2020
This ground-breaking study ranks Japan's most valuable brands, identifies their strengths, and explores the key factors that are driving growth in the market and changes in the Japanese brand ecosystem.

BrandZ™ Top 30 Most Valuable South African Brands 2019
Our South African brands ranking is one of our most diverse, with brands from several categories covered from banks and hospitals to beer, fast food and entertainment. Explore brand building in the 'rainbow nation'.

BrandZ™ Top 40 Most Valuable Australian Brands 2019
Our latest Australian ranking highlights an economy dominated by retail, telecoms, insurance and banks. But what's missing from Australia's brand mix? Explore Australia's most successful brands, the innovation gap, and key lessons for building strong brands that stand the test of time.
THE BRANDZ™ CHINA INSIGHTS REPORTS

IN-DEPTH BRAND-BUILDING INTELLIGENCE ABOUT TODAY’S CHINA

THE OPPORTUNITY TO BUILD BRANDS IN CHINA IS GREATER THAN EVER. BUT SO ARE THE CHALLENGES.

The fastest growth is happening deep in the country, in less well-known cities and towns. Consumers are more sophisticated and expect brands to deliver high-quality products and services that show real understanding of local market needs.

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.

BrandZ™ Top 100 Most Valuable Chinese Brands 2019
The report profiles Chinese brands, outlines major trends driving brand growth and includes commentary on the growing influence of Chinese brands at home and abroad.

Unmasking the individual Chinese Investor
This exclusive new report provides the first detailed examination of Chinese investors, what they think about risk, reward and the brands they buy and sell. This will help brand owners worldwide understand market dynamics and help build sustainable value.

The Power and Potential of the Chinese Dream
"The Power and Potential of the Chinese Dream" is rich with knowledge and insight, and forms part of a growing library of WPP reports about China. It explores the meaning and significance of the "Chinese Dream" for Chinese consumers as well as its potential impact on brands.

The Chinese Golden Weeks in Fast Growth Cities
The report profiles the most valuable brands of Argentina, Brazil, Chile, Colombia, Mexico and Peru and explores the socio-economic context for brand growth in the region.

For the iPad magazine, search Golden Weeks on iTunes.

For the iPad magazine, search Golden Weeks on iTunes.

The Chinese Golden Weeks in Fast Growth Cities
Using research and case studies, the report examines the shopping attitudes and habits of China’s rising middle class and explores opportunities for brands in many categories.

BrandZ™ Top 50 Chinese Global Brand Builders 2019
This groundbreaking study aims its radar at the edge of the Chinese brand universe, exploring developed country markets where only a few Chinese brands have dared to go - so far.

Using research and case studies, the report examines the shopping attitudes and habits of China’s rising middle class and explores opportunities for brands in many categories.

For the iPad magazine, search Golden Weeks on iTunes.
InnovationZ
Discover InnovationZ, a dynamic new tool from BrandZ™
Discover innovation ideas from around the world, personalised to your client's category.

WebZ
Your web traffic story for your brand
WebZ helps you understand your brand's digital journey! Through analyzing how traffic is driven to your brand's website, it will help you understand your audience demographics and gain insights into viewer trends.

BrandZ™ SocialZ
Real-time Brand Social Media Analytics Dashboard
Part of the BrandZ™ suite of tools SocialZ is the new social media data visualisation product from BrandZ™ that enables you to easily track, visualize and present a data-driven approach using the real-time view of social landscape surrounding any brand.

TrustR
Engaging Consumers in the Post-Recession World
Trust is no longer enough. Strong brands inspire both Trust (belief in the brand's promise developed over time) and Recommendation (current confirmation of that promise). This combination of Trust plus Recommendation results in a new metric called TrustR.

RepZ
Maximising Brand and Corporate Integrity
Major brands are especially vulnerable to unforeseen events that can quickly threaten the equity cultivated over a long period of time. But those brands with a better reputation are much more resilient. Four key factors drive Reputation: Success, Fairness, Responsibility and Trust. Find out how your brand performs.

CharacterZ
Brand personality analysis deepens brand understanding
Need an interesting and stimulating way to engage with your clients? Want to impress them with your understanding of their brand? A new and improved CharacterZ can help! It is a fun visual analysis, underpinned by the power of BrandZ™, which allows detailed understanding of your brand's personality.

BrandZ™ on the Move
Get the BrandZ™ Top 100 Most Valuable Global Brands, Chinese Top 100, Indian Top 50, Latin American Top 50, USA Top 100, and many more insightful reports on your smartphone or tablet. Interactive elements allow you to create your own data charts, look at the brand values over time for the brands you are most interested in, and send charts, articles and insights to your colleagues directly from the app.

To download the apps for the BrandZ™ rankings go to www.BrandZ.com/mobile (for iPhone and Android). BrandZ™ is the world’s largest and most reliable customer-focused source of brand equity knowledge and insight. To learn more about BrandZ™ data or studies, or view one of our industry insight videos, please visit www.BrandZ.com, or contact any WPP company.
One of mankind’s greatest recent achievements was successfully sequencing our own Genome in 2003, revealing the key building blocks of what makes us human.

**NOW BRANDZ™ GIVES YOU THE ABILITY TO DO THE SAME FOR YOUR BRAND OF CHOICE.**

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

BCW (BURSON COHN & WOLFE)

BCW is one of the world’s largest full-service global communications agencies. Founded by the merger of Burson-Marsteller and Cohn & Wolfe, BCW delivers digitally and data-driven creative content and integrated communications programs grounded in earned media and scaled across all channels for clients in the B2B, consumer, corporate, crisis management, CIR, healthcare, public affairs and technology sectors. BCW is a part of WPP (NYSE: WPP), the world’s leader in communications services.

HILL+KNOWLTON STRATEGIES

When it really matters. That’s when businesses and their management turn to Hill+Knowlton Strategies for advice. We protect their reputations. And we also build brand reputations. Fostering acceptance of and support for the management and the company among its main stakeholders is crucial. At Hill+Knowlton, we specialize in a multi-stakeholder approach. Analyzing, informing and keeping stakeholders engaged in an innovative, effective and efficient manner. As the leader in the arena, Hill+Knowlton is at its best when our clients face increasingly complex risks. We solve problems. And we assist businesses and their management when they are at their most vulnerable.

Emark is a specialist and named leader in Salesforce marketing technology and part of Wunderman. We use data and analytics to identify ideas and problems with the sole purpose of inspiring people to take action. To engage today’s customer, we understand that brands must deliver content, experiences and information across various channels, at the right moment in time and they need to utilize the possibilities of technology to be able to deliver on the expectation.

Based in Haarlem, Netherlands, and with international offices located in London and Barcelona, Emark employs more than 140 experts, who provide best-in-class CRM capabilities. Emark operates for over 400 leading companies such as Scotch & Soda, Basic-Fit, Randstad, BPD, Bugaboo, Formula 1, Bayer and many more.

GROUPM

GroupM is the world’s leading media investment company responsible for more than $113B in annual media investment through agencies including Mindshare, MediaCom, Wavemaker, Essence and m/SIX, as well as the outcomes-driven programmamtic audience company, Basis. GroupM creates competitive advantage for advertisers via its worldwide organization of media experts who deliver powerful insights on consumers and media platforms, trading expertise, market-leading brand-safe media, technology solutions, addressable TV, content, sports and more.

HOGARTH

“Hogarth is a marketing implementation agency. We produce advertising and other marketing communications for our clients across all media and all languages. Our production expertise coupled with our powerful workflow and asset management technology delivers quality, control and savings for global brands. We believe that the production, adaptation and supply of advertising materials is a specialist activity that should be carried out by a company that focuses solely on this discipline. We work alongside creative and media agencies to deliver advertising into market efficiently and cost effectively – with quality enhanced and with all language and cultural challenges managed by experts.”
INSTITUTE FOR REAL GROWTH

The Institute for Real Growth is the only marketing leadership capability development program that focuses on both senior executives’ organization’s business growth objectives and his or her personal leadership growth objectives. IRG is a not-for-profit and independent institute co-founded by WPP, Kantar, Google, Forrester, Spencer Stuart, LinkedIn, and the University of Oxford, and the New York University of Professional Studies. IRG is focused on helping growth leaders measure and drive sustained, long-term “real growth”, by connecting growth leaders to peers and expertise through live-action programs.

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MINDSHARE

Mindshear is a global network with 116 branches in 86 countries and approx. 8,500 people, part of WPP. We opened our first branch in Asia (1997) and shortly thereafter in the Netherlands (1999). We aim to be the leading business partner to our clients, to grow their business and drive profitability through adaptive and inventive marketing. Since the acquisition of Greenhouse (WPP), we have put together a team of pioneering communication consultants who connect our customers’ brands with their consumers, through our core values of speed, teamwork and provocation. We want to be the organization that unite people and organisations.

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MEDIACOM

Mediacom “The Content + Connections Agency”, working for clients to leverage their brand’s entire system of communications across paid, owned and earned channels delivering a step change in their business outcomes. A world leading media communications specialist, with billings of US$33 billion, employing 10,000 people across 105 countries. Clients include Adidas, Coca-Cola, Dell, Mars, NBCUniversal, Philips, PSA, Richmont, Shell and Sony. In June 2018 Mediacom was named Cannes Lions Media Agency Network of the Year. The first time any agency network has held all six major Agency network of the year titles at once (AdWeek, Campaign, IOH Global, Gunn MediaCO, M&M Global).

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OGILVY | SOCIAL.LAB

“OgilvySocial Lab is an award-winning integrated creative network that makes brand matter in the social age by combining story & system.

It has produced iconic, culture-changing marketing campaigns since the day its founder David Ogilvy opened up shop in 1948. Today, Ogilvy is an award-winning integrated creative network that makes brands matter for Fortune Global 500 companies and local businesses across 151 offices in 83 countries. The company creates experiences, design and communications that shape every aspect of a brand’s needs through six core capabilities: Brand Strategy, Advertising, Customer Engagement and Commerce, PR and Influence, Digital Transformation, and Partnerships. Ogilvy is a WPP company (NASDAQ: WPP).

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SUPERUNION

“Superunion is a next-generation brand agency built on a spirit of creative optimism. We use upstream creativity to build brands that unite people and organisations. We’re experts in brand strategy, identity, communications, brand engagement, reputation and brand management. We are a truly global agency of 750 people, with 23 offices in 18 countries, working with clients including Aetna, Airbus, Bank of America Merrill Lynch, Colgate-Palmolive, Dell, Dolby, Draper, Ford, IAG, Land Rover, Netflix, P&G, Prudential, Tesco and Vodafone.

We work with clients across a broad spectrum of their critical audiences, including corporate, consumer, customer and talent, and understand how they are connected. This means that we can provide a more complete view of the role of brand in driving strategic advantage for our clients, adding value where and when it matters most. Our Amsterdam office is a multidisciplinary house of specialists with a strong history of vibrant relationships with game-changing international brands such as ING, HEINEKEN, Liberty Global, Ziggo, Vodafone, PostNL, Philips and Nikon. In The Netherlands, this office operates under the brand name VBAT.”

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THE STORE

The Store is a global retail practice of WPP, specializing in providing expertise, support and added value to client initiatives in retail dynamics. The Store is a knowledge hub, built to help clients navigate through insights for consumers, retailing, marketing and sales activation, and technology. The Store is also a host of global workshops that bring together retailing and branding experts to share their vision and expertise for future growth.

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“VBAT primarily concerns itself with the development of a brand’s foundations. As such it is important for us to understand our client’s goals and, as required, to question and discuss those goals. We are, however, brand creators rather than marketing people. We create a visualization of the brand in the market and respect the fact that the owners of the brand are responsible for defining its marketing goals. Both lateral and linear thinking is required to build relevant and successful brands. The output of this thinking determines the look and feel of a company, brand or product and, as such, should reflect its ambitions. At VBAT, creating brands means creating personalities, which is much more than developing a logo.

Our work method determines the foundations upon which a brand is built and identifies a brand’s perception triggers. As much as possible, we blend the various communication skills into one another from the very earliest stage of a project. We are not specifically design, interactive, retail, packaging, corporate or advertising minded, but rather all six at once. Our individual skills are hereby not weakened but enhanced by the interrelated solutions which we create.

In developing our solutions, we apply tools that are genuinely unique.”

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VBAT

VMLY&R
VMLY&R is a global marketing agency with more than 7,000 employees worldwide with principal offices in Kansas City, London, New York, São Paulo, Shanghai, Singapore and Sydney. VMLY&R works with client partners including Colgate-Palmolive, Danone, Dell, Ford, Office Depot, PepsiCo, Pfizer and Wendy’s.

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VMLY&R

WAVEMAKER
Wavemaker is a next generation agency that sits at the intersection of media, content and technology. We are obsessed with the customer’s purchase journey and this is what connects our mission directly to our client’s business challenges. We invented WM Momentum, the world’s most comprehensive study into how people make purchase decisions and have conducted over 500,000 surveys in 40 markets and across more than 80 categories. We are a business that is powered by the creativity and curiosity of our 8,500 people in 90 countries, united by our PACED values. We are a part of GroupM, WPP’s global media investment management company.

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WAVEMAKER

WUNDERMAN THOMPSON
Wunderman Thompson is a creative agency with a focus on data and technology. Based on our own international expansion, we aim to inspire ambitious brands to grow. We advise clients in their own transition and help them write their own success story. Smart strategy, innovative technology, in-depth data analysis and unique creativity: those are the ingredients that help us bring any marketing project to a successful close. This way we can help clients and brands play a pioneering role in our fast-changing digital world. Day after day, more than 200 talented staff put their best foot forward in our Antwerp and Brussels branches.

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WUNDERMAN THOMPSON BELGIUM
KANTAR in the Netherlands

Kantar is the world’s leading data, insights and consulting company.

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You can also keep updated on the latest news and studies from the Kantar network in the Netherlands through the Kantar portal:
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WPP in the Netherlands

WPP is a creative transformation company. We build better futures for our clients through an integrated offer of communications, experience, commerce and technology.

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Top 30 Most Valuable Dutch Brands 2020

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Emmy Brand is a Client manager at Kantar, and the country champion of BrandZ™. She is involved in the consumer research component of – and the analysis for the BrandZ™ ranking.

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Hugo is schooled as a media psychologist and oversees the business of Kantar in the Netherlands. If you want to know how BrandZ™ can help your brand grow, contact Hugo.

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WITH SPECIAL THANKS AND APPRECIATION TO:
Richard Balland, Koo Bhanga, Sarah Cousins, Tuhin Dasgupta, Bethan Davies, Machteld Gelderland, Sjoerd Hoogland, Anthony Marris, Simran Rainu, Stefan Rutten, Damon Smith, Judit Stockl, Annelies Kant - Kantekst and The Unloved
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Back in the day, I was Global Planning Director on major blue-chip businesses, including automotive, FMGC, technology and retail.

If only I’d had RoZie to help me.

My knowledge and understanding of brands around the world would have been fuller; I would have generated smarter briefs, my answers to clients quicker, and my new business record even RoZier.

But don’t take my word for it, go to the link below and say hello to RoZie.

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https://rozie.wppbrandz.com
The brand valuations in the BrandZ™ Top 30 Most Valuable Dutch Brands 2020 are produced by Kantar, using market data from Kantar, along with Bloomberg.

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 3.7 million consumer interviews about more than 165,000 different brands in over 50 markets.

Bloomberg
The Bloomberg Professional service is the source of real-time and historical financial news and information for central banks, investment institutions, commercial banks, government offices and agencies, law firms, corporations and news organizations in over 150 countries. For more information, please visit www.bloomberg.com.

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