KANTAR BRANDZ

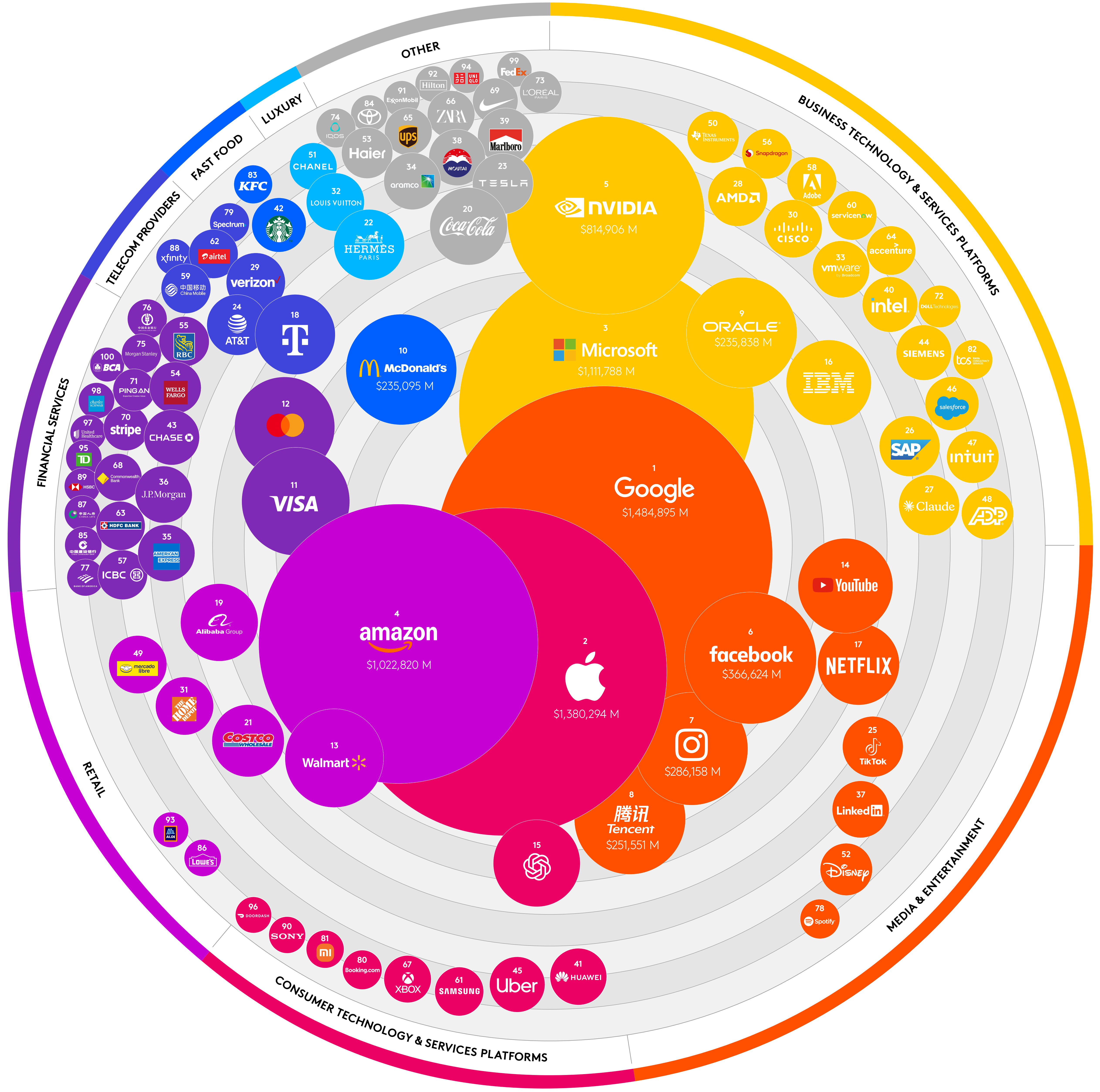
2026 MOST VALUABLE GLOBAL BRANDS

GOOGLE/APPLE/MICROSOFT/AMAZON/NVIDIA/
FACEBOOK/INSTAGRAM/TENCENT/ORACLE/
MCDONALD'S/VISA/MASTERCARD/WALMART/
YOUTUBE/CHATGPT/IBM/NETFLIX/
TELEKOM T-MOBILE/ALIBABA/COCA-COLA/
COSTCO/HERMÈS/TESLA/AT&T/TIKTOK/SAP/CLAUDE/
AMD/VERIZON/CISCO/THE HOME DEPOT/LOUIS VUITTON/
VMWARE/ARAMCO/AMERICAN EXPRESS/J.P. MORGAN/
LINKEDIN/MOUTAI/MARLBORO/INTEL/HUAWEI/
UBER/SALESFORCE/
TEXAS INSTRUMENTS/
CHANEL/DISNEY/HAIER/WELLS FARGO/RBC/SNAPDRAGON/
MOBILE/SERVICENOW/SAMSUNG/
ACCENTURE/UPS/ZARA/XBOX/
COMMBANK/NIKE/STRIPE/PING AN/DELL TECHNOLOGIES/
L'ORÉAL PARIS/IQOS/MORGAN STANLEY/
AGRICULTURAL BANK OF CHINA/BANK OF AMERICA/
SPOTIFY/SPECTRUM/BOOKING.COM/XIAOMI/
TATA CONSULTANCY SERVICES/KFC/TOYOTA/
CHINA CONSTRUCTION BANK/LOWE'S/CHINA LIFE/
XFINITY/HSBC/SONY/EXXONMOBIL/HILTON/ALDI/
UNIQLO/TD/DOORDASH/UNITEDHEALTHCARE/
CHARLES SCHWAB/FEDEX/BCA

KANTAR BRANDZ

2026 MOST VALUABLE GLOBAL BRANDS

	BRAND	BRAND VALUE (US$M)
1	GOOGLE	1,484,895
2	APPLE	1,380,294
3	MICROSOFT	1,111,788
4	AMAZON[1]	1,022,820
5	NVIDIA	814,906
6	FACEBOOK	366,624
7	INSTAGRAM	286,158
8	TENCENT[2]	251,551
9	ORACLE	235,838
10	MCDONALD'S	235,095
11	VISA	228,570
12	MASTERCARD	184,721
13	WALMART	176,706
14	YOUTUBE	168,547
15	CHATGPT	167,765
16	IBM	150,760
17	NETFLIX	139,422
18	TELEKOM/T-MOBILE	124,636
19	ALIBABA[3]	122,266
20	COCA-COLA[4]	121,324
21	COSTCO	114,288
22	HERMÈS	113,136
23	TESLA	112,097
24	AT&T	107,032
25	TIKTOK	98,436
26	SAP	98,183
27	CLAUDE	96,577
28	AMD	91,089
29	VERIZON	90,494
30	CISCO	90,483
31	THE HOME DEPOT	87,634
32	LOUIS VUITTON	87,532
33	VMWARE	84,311
34	ARAMCO	82,917
35	AMERICAN EXPRESS	80,316
36	J.P. MORGAN	76,651
37	LINKEDIN	76,485
38	MOUTAI	73,630
39	MARLBORO	73,336
40	INTEL	69,108
41	HUAWEI	68,156
42	STARBUCKS	66,210
43	CHASE	63,078
44	SIEMENS[5]	61,126
45	UBER	58,186
46	SALESFORCE	56,110
47	INTUIT	55,516
48	ADP	55,505
49	MERCADO LIBRE[6]	54,998
50	TEXAS INSTRUMENTS	54,924
51	CHANEL	53,127
52	DISNEY	52,968
53	HAIER	52,949
54	WELLS FARGO	52,904
55	RBC	51,480
56	SNAPDRAGON	51,053
57	ICBC	50,513
58	ADOBE	50,511
59	CHINA MOBILE	50,315
60	SERVICENOW	49,457
61	SAMSUNG	48,736
62	AIRTEL	47,628
63	HDFC BANK	47,507
64	ACCENTURE	45,240
65	UPS	45,234
66	ZARA	44,088
67	XBOX	43,972
68	COMMBANK	43,306
69	NIKE	41,188
70	STRIPE	40,187
71	PING AN	37,219
72	DELL TECHNOLOGIES	37,124
73	L'ORÉAL PARIS	36,854
74	IQOS	36,634
75	MORGAN STANLEY	36,509
76	AGRICULTURAL BANK OF CHINA	36,332
77	BANK OF AMERICA	35,942
78	SPOTIFY	34,930
79	SPECTRUM	34,904
80	BOOKING.COM	33,389
81	XIAOMI	32,502
82	TATA CONSULTANCY SERVICES	32,416
83	KFC	32,180
84	TOYOTA	31,772
85	CHINA CONSTRUCTION BANK	30,302
86	LOWE'S	30,094
87	CHINA LIFE	29,762
88	XFINITY	29,580
89	HSBC	29,558
90	SONY	28,897
91	EXXONMOBIL	28,097
92	HILTON	28,036
93	ALDI	27,702
94	UNIQLO	27,284
95	TD	27,065
96	DOORDASH	26,533
97	UNITEDHEALTHCARE	26,419
98	CHARLES SCHWAB	26,083
99	FEDEX	25,739
100	BCA	25,663



Other includes: Automotive, Food and Beverage, Apparel, Energy, Tobacco, Alcohol, Logistics, IoT Ecosystem, Personal Care, Travel Services

1. Amazon Brand Value includes Amazon Music, Amazon Prime Video, Amazon Web Services. 2. Tencent Brand Value includes QQ, WeChat, Tencent Music, WeSing, WeChat Pay, WeBank, v.qq.com, Tencent Cloud. 3. Alibaba Brand Value includes Alibaba Cloud, Ant Financial, AliExpress, AliHealth, Taobao, Tmall. 4. Coca-Cola Brand Value includes Lights and Diets. 5. Technology Conglomerate. 6. Mercado Libre Brand Value includes Mercado Pago.

Source: *Kantar/Kantar BrandZ (including data from S&P Capital IQ and Euromonitor).*

INSIDE THE GLOBAL BRAND ECONOMY
WHY INTELLIGENCE IS NOW A GROWTH ADVANTAGE

Each year, the Kantar BrandZ Global Top 100 offers a unique view of how brands are performing in the economy. The results tell a story of resilience, value creation, and growth, and it's one we can all learn from. This year, the signal is unmistakable.

The total value of the world's top brands has grown 22% year on year, reaching more than $13 trillion. This feat – at a time of extreme volatility, disruption, and accelerating change, no less – demonstrates that when brands are built with discipline, clarity, and confidence, they can outperform the market in remarkable ways.

At the very top of this year's ranking sits Google, now the world's most valuable brand. Its leadership reflects not only scale and reach, but the ability to remain Meaningfully Different as technology reshapes how people search, choose, and experience brands. More broadly, Google's success illustrates a defining truth from this year's analysis: the brands that grow fastest are those that turn intelligence into action.

Why this matters now

Economic pressure, AI-driven disruption, fragmented attention, and rising expectations mean leaders are making more decisions more often, with higher stakes attached.

What clients tell us consistently is that they do not need more data. They need better intelligence: intelligence that cuts through noise, enables speed, and links decisions directly to growth outcomes.

At Kantar, we describe this as Intelligence for Brand Growth: the ability to connect what is happening in markets and culture to the decisions leaders make every day, and to the strategies that build long-term value. Kantar BrandZ sits at the heart of that system.

From evidence to advantage

For more than two decades, BrandZ has provided the world's most robust evidence base on how brands create value. Combining deep human understanding with longitudinal data, BrandZ consistently shows that strong brands grow faster, recover quicker, and deliver more resilient returns over time.

This year's results reinforce that story at unprecedented scale.

The $13 trillion-plus in brand value represented in the Global Top 100 is the cumulative outcome of sustained brand-building decisions made with confidence and consistency. The 22% growth recorded this year underlines the commercial advantage of treating brand as an asset, not a cost.

In an accelerating, volatile world, value is created when brands quickly translate understanding into better decisions – and when leaders confidently balance short-term pressures against long-term brand building.

At Kantar, we're addressing this need by helping brands get closer to the people they serve across every moment that matters. In practice, that means aligning three connected forms of intelligence:

Signal intelligence to identify changing consumer behaviour and market dynamics in real-time, with human-centric data enhanced by AI.

Decision intelligence to optimise choices with predictable ROI.

Strategic intelligence to connect those choices to long-term growth strategies that tie directly to enterprise value.

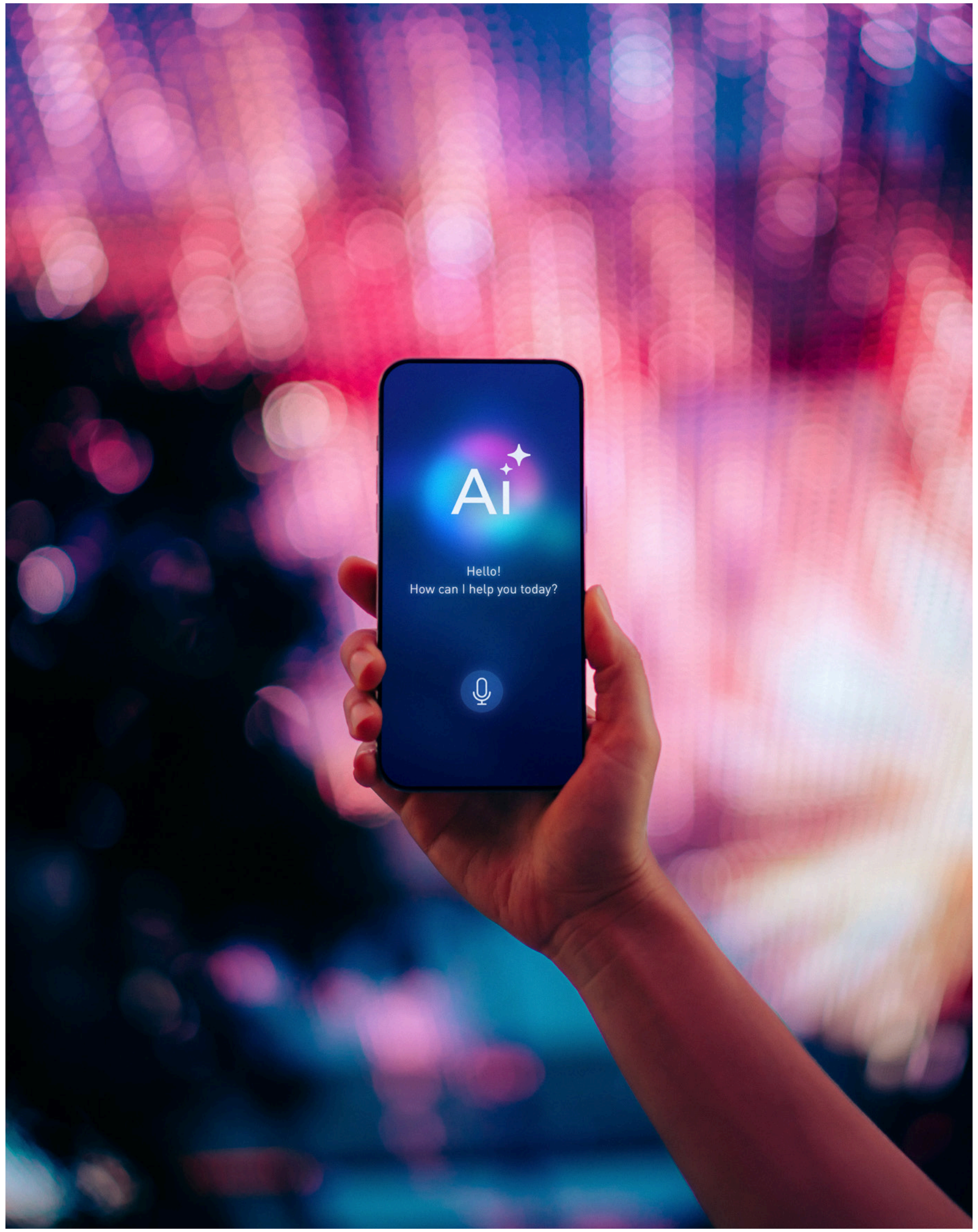
Together, these capabilities are powered by the **Kantar Intelligence Engine**: a combination of human and AI data on real people, predictive IP, global expertise, and AI-native platforms.

This is why more and more brands are building Kantar directly into their decision support and performance management systems.

What the strongest brands have in common

The brands leading this year's Global Top 100 are not those chasing every new signal. They're the ones that read change early, focus on what truly matters, and act decisively. They build Meaningful Difference: relevance people feel and difference they recognise, combined with easy recall and consistency over time.

Google's position at the top of the ranking, alongside growth across the Global Top 100, is a reminder that success in the AI era is not about speed alone. It is about turning intelligence into advantage, and advantage into value.

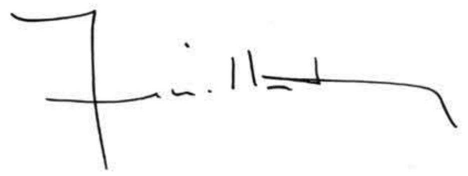


Using this report

My hope is that this year's Kantar BrandZ Most Valuable Global Brands report provides practical evidence you can use: to strengthen the case for investing in brand, to challenge assumptions, and to make more confident decisions in an increasingly complex environment.

The brands that win will not be those with the most data, but those that turn intelligence into growth – consistently, with confidence, and at scale.

Sincerely,



Paul Zwillenberg
Group Chief Executive & Kantar CEO

paul@kantar.com

WHAT IS KANTAR BRANDZ?

THE DEFINITIVE GUIDE TO BRAND BUILDING

5.6 BILLION DATA POINTS

4.6 MILLION CONSUMER INTERVIEWS

22,392 BRANDS

545 CATEGORIES

54 MARKETS

LEARN MORE ABOUT KANTAR BRANDZ,
VISIT KANTAR.COM/CAMPAIGNS/BRANDZ

Kantar BrandZ ranks the most valuable brands in the world, shows you how to become one of them.

Combining the world's largest consumer-focused source of brand equity insight with our proprietary brand valuation methodology, BrandZ helps leaders understand not just which brands grow, but why – and how to act.

Kantar BrandZ intelligence is grounded in Kantar's unique Meaningful Different and Salient framework (MDS), which is globally validated by the Marketing Accountability Standards Board (MASB).

Since its inception in 2006, Kantar BrandZ continues to evolve, ranking, analysing, and honouring the world's top brands while enabling marketers, strategists, and leaders to make better decisions and build long-term value.

Kantar BrandZ has become a global-standard brand value ecosystem, featuring country and regional rankings across six continents, and world-class expert insights on building strong brands.

HOW DOES KANTAR BRANDZ WORK?

STEP
01
FINANCIAL VALUE ($)

The proportion of the total US$ value of the parent company that can be attributed to the brand in question, considering both current and future performance.

×

STEP
02
BRAND CONTRIBUTION (%)

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 and their implications for future performance.

=

STEP
03
BRAND VALUE ($)

The US$ amount that the brand contributes to the overall business value of the parent company. Kantar 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.

FOR THE FULL METHODOLOGY BEHIND KANTAR BRANDZ,
VISIT KANTAR.COM/CAMPAIGNS/BRANDZ/METHODOLOGY

WHAT CAN KANTAR BRANDZ DO FOR YOU?

Kantar BrandZ uniquely predicts the enterprise value that comes from brand actions, allow businesses to command a price premium and be more resilient. Investing in your brand remains the most powerful way to grow. What's more, we can show you how. Our signal intelligence creates a forensic portrait of a brand's strengths, weaknesses, and opportunities within one – or many – categories and markets.

The Kantar BrandZ Strong Brands Portfolio has grown share prices 53% more than the S&P 500 index.

STRONG BRANDS:

DELIVER SUPERIOR SHAREHOLDER RETURNS

ARE MORE RESILIENT IN TIMES OF CRISIS

RECOVER MORE QUICKLY

INTRODUCING KANTAR’S MEANINGFUL DIFFERENT AND SALIENT FRAMEWORK

The most valuable brands in the world have built powerful connections, turning intelligence into action and action into growth. Brands with powerful connections have three essential qualities: Meaningful, Different, and Salient.

Behavioural science has taught us that our brains store memories using three types of mental connection: knowledge, feelings, and experience. Brands with a balance of each come to mind most easily – quickly activating the brain’s memory-retrieval processes.

Effective marketing delivers all three. The MDS framework is the predictive engine embedded across all platforms to achieve this.

A brand’s equity can impact consumer behaviour and contribute value to a corporation in three ways:

1. **Demand Power** (Current demand)
2. **Pricing Power** (Price premium)
3. **Future Power** (Future demand and price)

Don’t just take our word for it

The University of Oxford’s Saïd Business School has studied Kantar BrandZ brand valuations and compared them against the real-world ups and downs of business.

They found that Kantar BrandZ equity metrics are an excellent predictor of ‘abnormal’ business returns – those not explained by historical share price performance and company results alone – and that adding Kantar BrandZ measures to their models allowed them to predict business performance with 99.5% accuracy.

What they also found was that Difference contributed most to the best business results.

Saïd Business School

UNIVERSITY OF OXFORD

A NEW ERA
TOP BRANDS PURSUE INTELLIGENT GROWTH

It's been a record-setting 2026 for the Kantar BrandZ Top 100 Most Valuable Brands. The total value of the Global Top 100 has risen 22% since last year to reach an all-time high of over $13 trillion.

As always with BrandZ, that figure synthesises financial performance indicators *and* brand equity intelligence. Because while macro factors vary from year to year, brand is what allows businesses to overperform in any context – including this current period of rapid change.

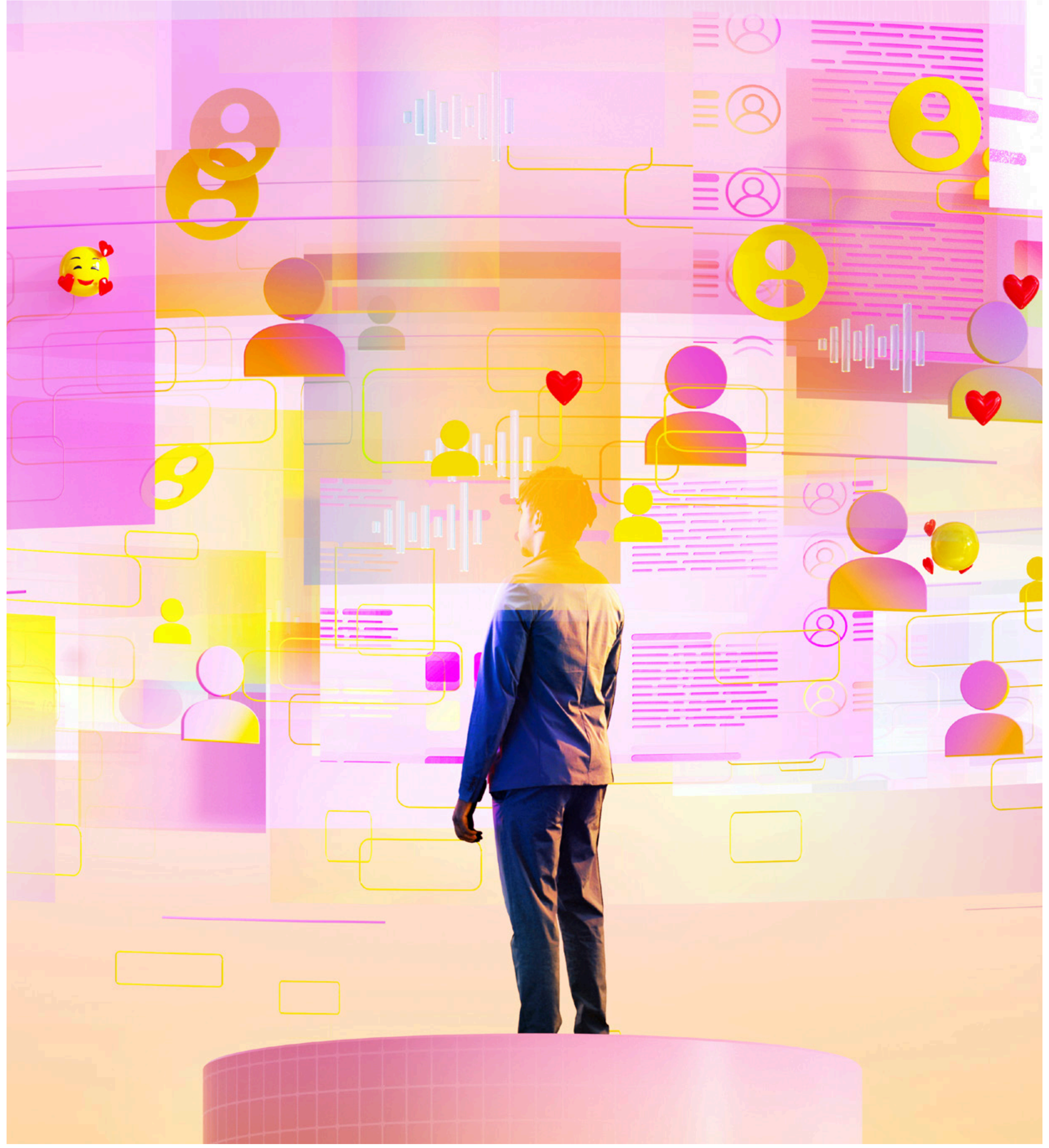
AI disruption has revolutionised brand building over the past 12 months, often for the better. Nearly three quarters of the Global Top 100 have seen year-on-year brand value gains.

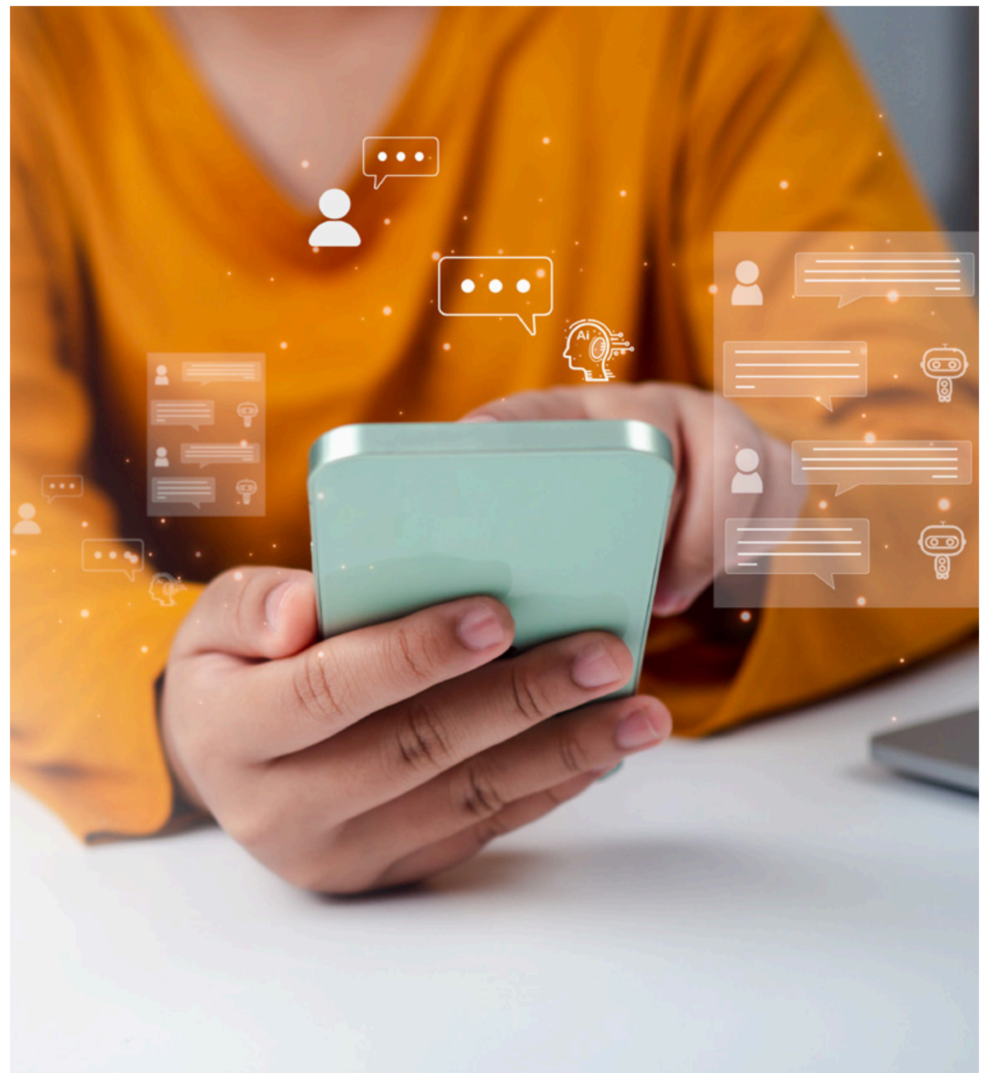
But top brands are also facing new forms of creative competition. AI has made it easier for brands to drive impact on a budget – to the benefit of all, but *especially* smaller challengers.

These days, there are a thousand and one ways to bring a great idea to life – and quickly. New production tools, new media channels, new shopping formats: As one CMO put it to us in an interview this year, 'AI is the great creative equaliser'.

Going forward, this means that brands' raw marketing spends will count for less than they used to. More important will be their investments in *intelligence*: in AI engines that cut through the noise and help brands win new business.

As our analysis this year shows, top brands are building out this intelligence advantage in three related ways.





01

Signal intelligence

Brand equity measures act as early signals for future growth opportunities. Future Power is the best **signal intelligence** of brand momentum. And Future Power, in turn, comes from building Meaningful Difference effectively and efficiently for your size.

Insight:

Brands with strong Future Power have a clear growth advantage.

- Small brands that started with high Future Power had a 67% higher growth rate than those that started with low Future Power.
- A recent project by Kantar and Google in Europe showed that brands with strong Future Power saw higher returns, faster recovery, and better stock market performance.

Implication:

Consistently track performance versus competitors to ensure you are building Future Power and Meaningful Difference.

02

Decision intelligence

Understanding brand effects gives marketers the **decision intelligence** they need to make better choices. It gives them a longer-term and more holistic perspective on how to market for growth.

Insight:

Only a third of brand associations centre around functional aspects. This leaves two-thirds of brand associations as opportunities to build emotional connections.

- Whether emotive or functional, Difference is critical. It is the number-one predictor of exceptional business returns.
- Being Meaningful to people is the lifeblood for brands. It's about connecting brands to culture and people's lives. Do so, and you'll build connections that last and grow.

Implication:

Explore building stronger cultural connections, and more of them.

03

Strategic intelligence

Brand equity isn't one-dimensional, and brands have different 'jobs to be done' depending on their life-stage and consumer standing. Identifying your Chief Marketing Objective gives you the **strategic intelligence** to shape your marketing plans.

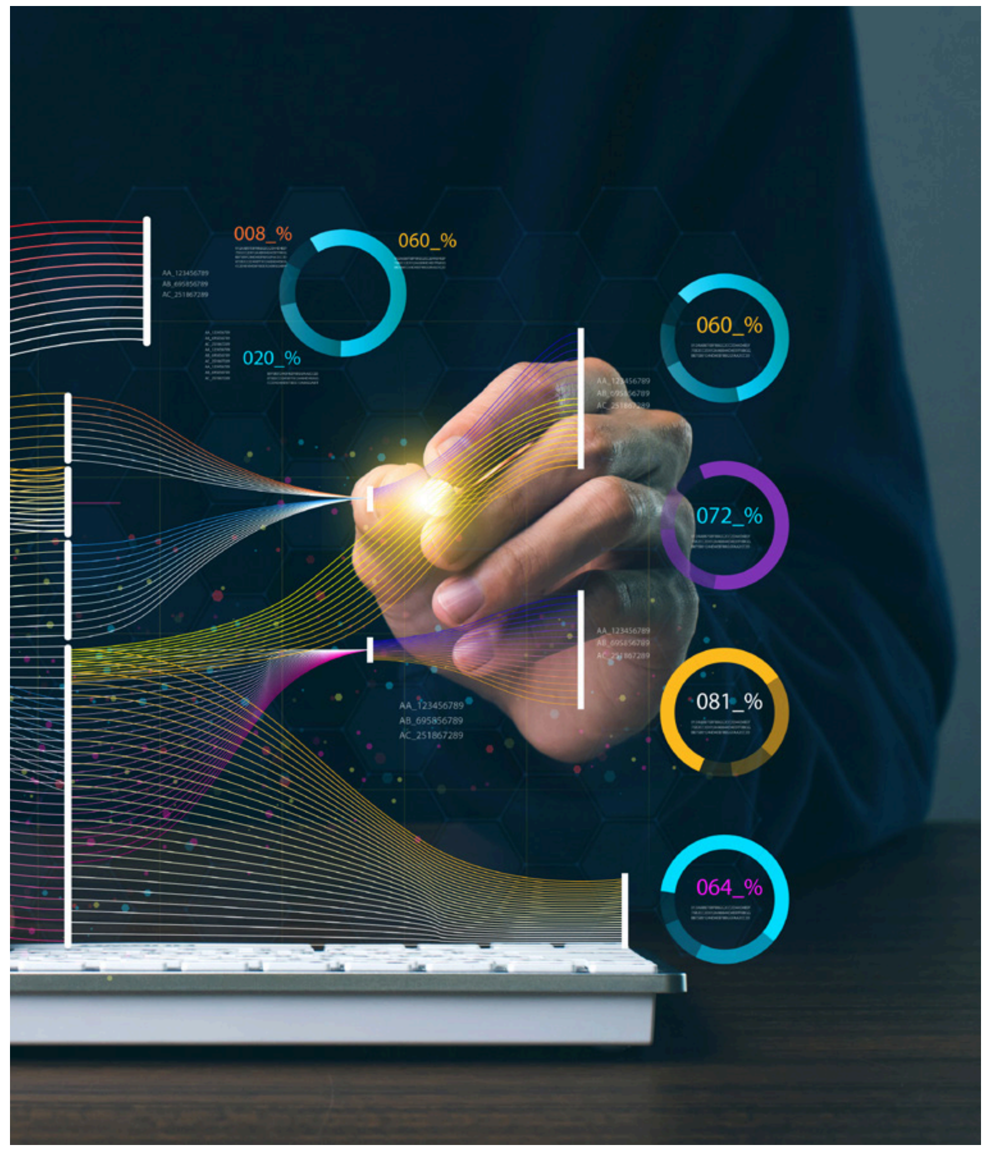
Insight:

Top brands have completed most of their Chief Marketing Objectives.

- Even then, brands can still realise value by converting Future Power into new forms of growth.
- Brands that achieve their Chief Marketing Objective are 1.6x as likely to grow their penetration

Implication:

Let brand equity intelligence guide you to your current Chief Marketing Objective – and then achieve it.



Putting it together

So where does all of the above leave CMOs and other marketers? More essential than ever, no doubt.

Advanced AI models are complex, ever-shifting webs of contingent connections. But so too is the human mind, as marketers know best of all. Which is why CMOs are at the forefront of using AI to drive growth. They're accustomed to a world where there are no etched-in-stone formulas for success – only dynamic strategies that must be constantly re-tested and refreshed according to the latest human intelligence.

Another win for CMOs: As AI brings content and commerce ever closer, CEOs will need platforms and decision engines that set them up for success in *both* these spheres. Marketers are born to shape this rich new world of 'shoppable storytelling'.

At Kantar, we've always known the power of brand. In this new era, our stance is emphatic: brands can be more powerful than ever. Strong brands get chosen by AI agents because they have more authority in training data from consumer advocacy. They cut through the cognitive overload of social shopping with immediate recognition. They build customer intimacy by leveraging first-party data from engaging customer experiences. They convince more creators to trust them as partners. And they provide connective tissue across fragmented assets and channels.

In doing all this, strong brands drive growth by boosting referrals, transactions, Pricing Power, and loyalty. But to capture this growth, you need unique new intelligence.

KANTAR

Signal Intelligence

Keep a pulse on consumers and markets

Decision Intelligence

Power optimal marketing choices with predictable ROI

Strategic Intelligence

Drive growth strategies that connect brand actions to enterprise value

KANTAR Intelligence Engine

- Human + synthetic data
- Predictive IP
- Global expertise
- AI-native platform

BRAND ANALYSIS

SIGNAL INTELLIGENCE
THE MARKETER'S CRYSTAL BALL

READING THE SIGNALS THAT SHAPE THE FUTURE OF BRANDS

Advanced AI has given marketers new tools to adjust their creative and media plans in real time. CMOs and their teams can now pivot quickly towards concepts that are working, and away from ones that aren't. How well they accomplish this, though, depends on the quality of their signal intelligence.

Strong signal intelligence involves a lot more than engagement rates and sales conversions. After all, history is littered with brands that failed to translate viral hits into durable growth. Why? A lack of clear brand messaging.

To avoid that outcome, signal intelligence works best when it is *dimensionalised* and *brand-informed*.

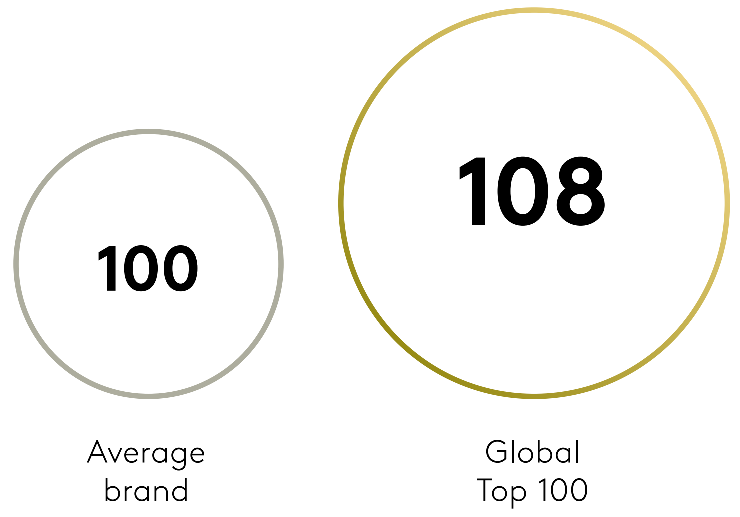
For example, imagine a new campaign that looks good on the surface – but your signal intelligence shows that it's not doing much for your brand perceptions. By learning this, you've gained a chance to course-correct *before* sales suffer. (Maybe you dial up new elements in the creative; maybe you switch to different channels or influencers.)

Brand equity measures can also act as early signals for growth.

Are you building momentum with your audience? Do people want to choose your brand more in the coming year? Are they interested in what you do next?
If so, you've got strong **Future Power**.

This measure of 'momentum' increases when businesses efficiently build extra brand equity relative to their size. This makes Future Power a boon to all kinds of brands – both in its own right, and as signal intelligence.

Future Power



Source: Kantar BrandZ, Global Most Valuable Brands, 2026

ESSENTIAL GUIDANCE FOR SMALL BRANDS

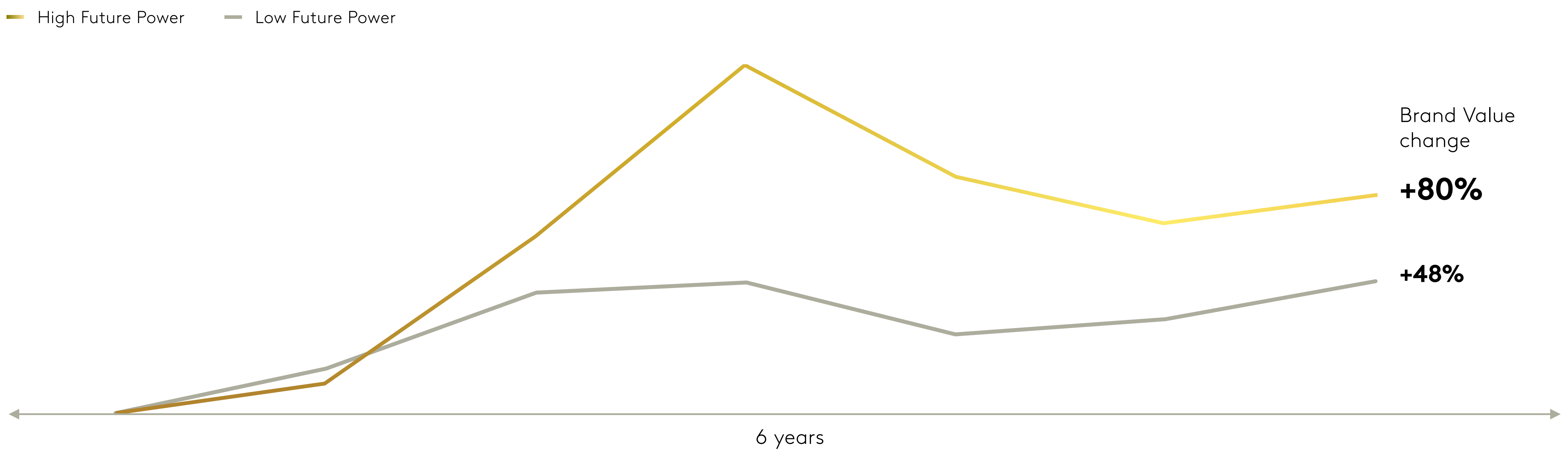
Deployed correctly, Future Power helps brand managers tell the difference between short-term hype and long-term growth engines. This is especially important for smaller brands looking to scale, because usually have more limited runway to prove themselves.

Brands with Future Power also enjoy a noticeable growth advantage. And again, this is especially the case for small brands.

Small brands with high Future Power might not be the most well-known names yet, but the people who do know them are more predisposed to choose them. And that's a reliable springboard to success.

To prove this, Kantar BrandZ's analysis team recently divided small brands into two sets: those with high Future Power, and those with low Future power. They then looked at how these brands developed over time. What they found was that Future Power provides small brands with a **strong initial acceleration of brand value growth**. Even better, this advantage persisted over time – such that after six years, brands that started with high Future Power had a 67% higher growth rate than those that started with low Future Power. This equates to +$4,895M vs +$1,831M respectively.

Brand value of small brands over time



Source: Kantar BrandZ, Most Valuable Global Brands 2019-2025

SIGNAL INTELLIGENCE
PERFORMANCE TODAY, POTENTIAL TOMORROW

HOW FUTURE POWER HAPPENS

Brands with high Future Power exist in all types of categories and fit all types of profiles. Context doesn't create Future Power. Brand equity does.

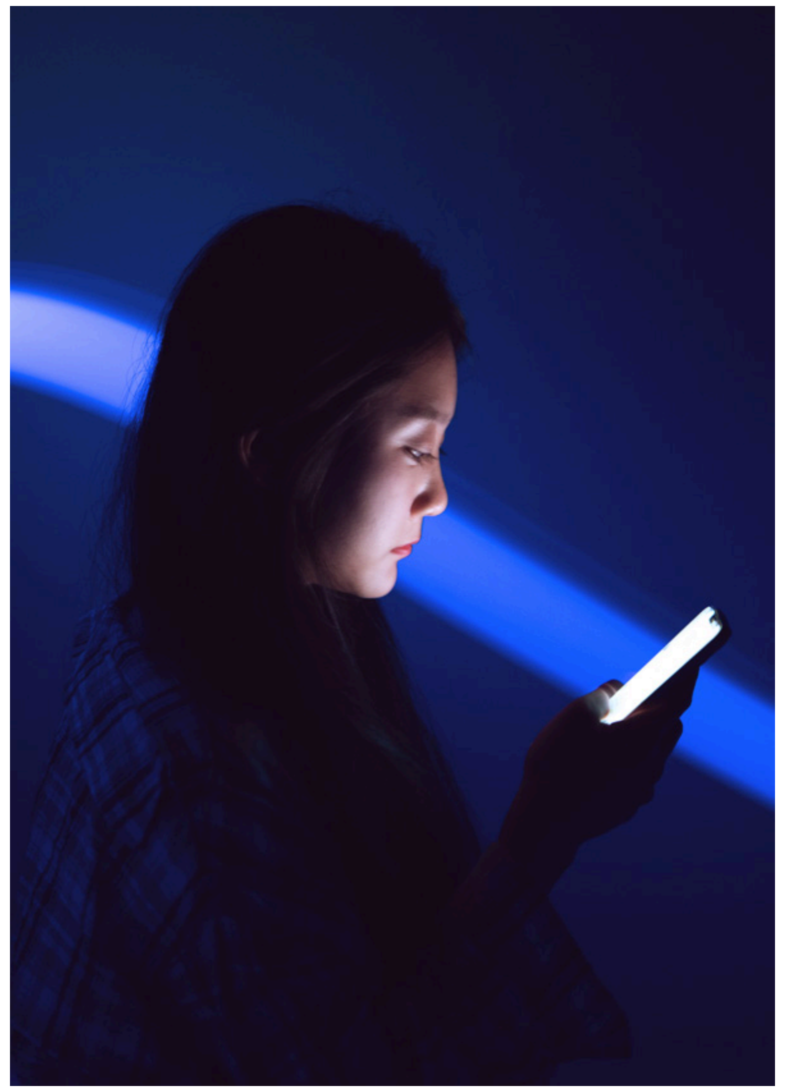
Here's what we know from analysing 21 years of BrandZ intelligence: Brands with good Future Power tend to be strongly Meaningful or Different. Brands with *exceptional* Future Power are more likely to be *both*. Indeed, 'extra' Meaningful Difference is *the* key characteristic of strong Future Power.

What this means is that tracking Meaningful Difference versus competitors (and relative to size) is essential to turning signal intelligence into growth.

CMOs need to establish what makes their brand Meaningful and Different early on – and then never lose sight of that advantage. In doing this, they'll capture lots of Demand Power in the here and now (thus driving volume share) while setting up even greater gains down the road through Future Power.

Success isn't guaranteed, of course. Brands with high Future Power will need to scale up and branch out to meet the moment.

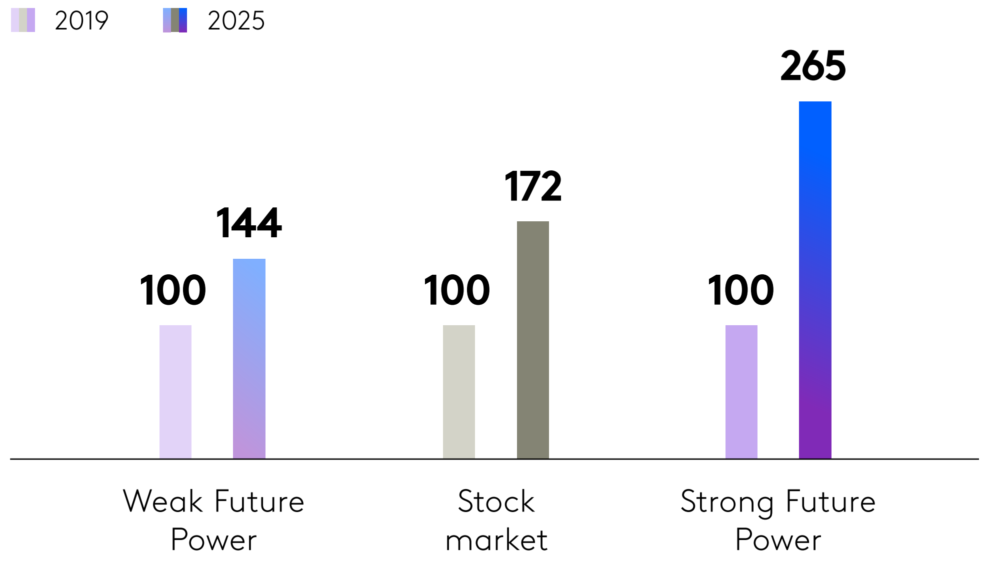
But if they've got high Future Power, odds are they're already doing lots of things right. In particular, they tend to be known for strong product performance, innovative category leadership, habit-forming design, and great word of mouth.



COMPANIES WITH THE STRONGEST BRAND EQUITY OUTPERFORM THE MARKET

A recent project by Kantar and Google across European markets showed that brands with the strongest Future Power saw higher returns, faster recovery, and better stock market performance (2.3x vs STOXX Europe 600).

Portfolio Performance Index



Source: Kantar x Google 2026, European companies

To learn more about signal intelligence, explore our Expert Insights.

DECISION INTELLIGENCE
MARKETING FOR MEANINGFUL DIFFERENCE

MAKE BETTER CHOICES

Insights only matter to the extent they drive decisions.

By understanding brand equity, marketers gain the **decision intelligence** they need to optimise for growth across their creative, media, and innovation pipelines. Because as 20+ years of BrandZ evidence shows, Meaningful Difference is *the* growth driver of brand value.

Brands that are Meaningfully Different to more people command

5x

PENETRATION TODAY

...and real advantage in penetration growth

GO AHEAD, GET EMOTIONAL

Meaningful and Difference are the cornerstones of strong brand equity. Difference is about standing out from the pack. It is the #1 predictor of exceptional business returns. Meaningful brands, meanwhile, meet people's needs in memorable ways.

Meaning is where a brand's distinctiveness gets 'personalised' (i.e., filtered through the needs of individual consumers). But Meaning is also the domain in which marketers tend to leave money on the table. How? By overlooking the role of emotion.

Brand Value growth 2019-2026

Source: Kantar BrandZ, Most Valuable Global brands, 139 brands

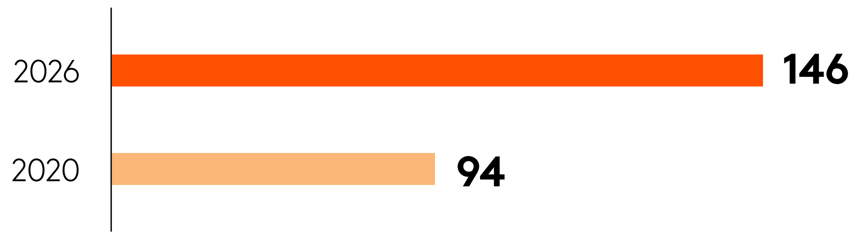
Whilst functionality is important, the strongest brands also use emotion to make deeper, more memorable connections. TikTok, for instance, has become more Meaningful globally by steering people toward emotional connections and shared experiences. And Bank of America has strengthened its relevance by blending advanced digital tools with empathetic, personalised guidance to build financial confidence.

Meaningful Index

TikTok

Brand Value 2020-2026

+483%

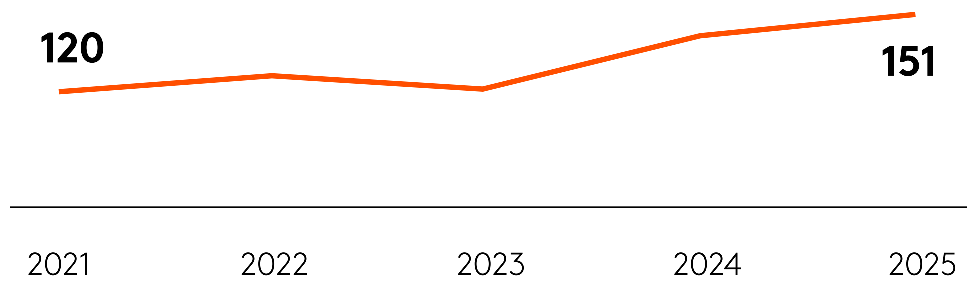


Source: Kantar BrandZ Global data, Online sharing & networking

BANK OF AMERICA

Brand Value 2019-2026

+100%



Source: Kantar BrandZ, USA, Banking

DECISION INTELLIGENCE
THE MEANINGFUL MODEL

HOW MEANING GETS MADE

A recent BrandZ analysis of 14,000 brand cases found that functional judgments accounted for only one-third of brand associations. That left emotional associations as the other two-thirds. And yet many brands still conceive of 'meeting peoples needs' in strictly functional ways (through aspects like product design, range, quality).

When it comes to building Meaningful connections, functionality and emotionality aren't mutually exclusive. Many exposures and experiences satisfy across both dimensions. For instance, they can enable convenience (functional) while also offering comfort (emotional).

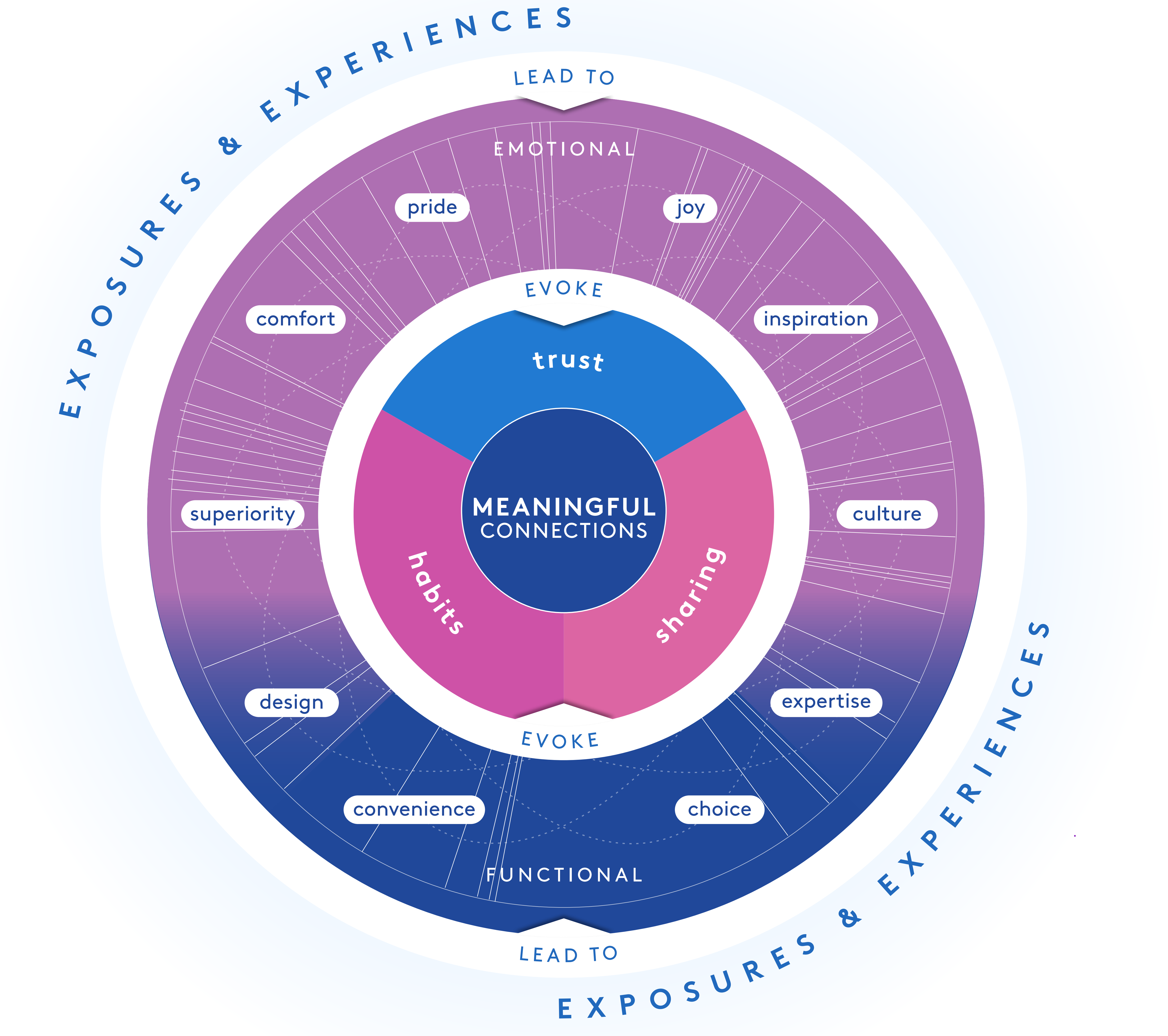
Some emotional exposures arise out of functional benefits. Because Spotify is so good at serving music you like on its user-friendly platform, you can feel proud that you're a Spotify user and have made it a habitual part of your routine. But Spotify also builds Meaning through explicitly emotional actions. A good example is Spotify Wrapped, which uses advanced data capabilities to connect with people over their music choices, creating millions of viral sharing moments every year.

Function alone cannot build the lasting memory structures that brands rely on. For that, you also need the other two-thirds of Meaningful brand exposures – those more emotive encounters with a brand out in the world.

When these functional and emotional perceptions are reinforced, they form three key drivers of Meaning:

- **Trust** – brands you know you can rely on
- **Habits** – brands you choose instinctively, without friction
- **Sharing** – brands you want to talk about or be seen with

When a brand owns one or more of these, it becomes truly Meaningful, playing an active role in people's lives.

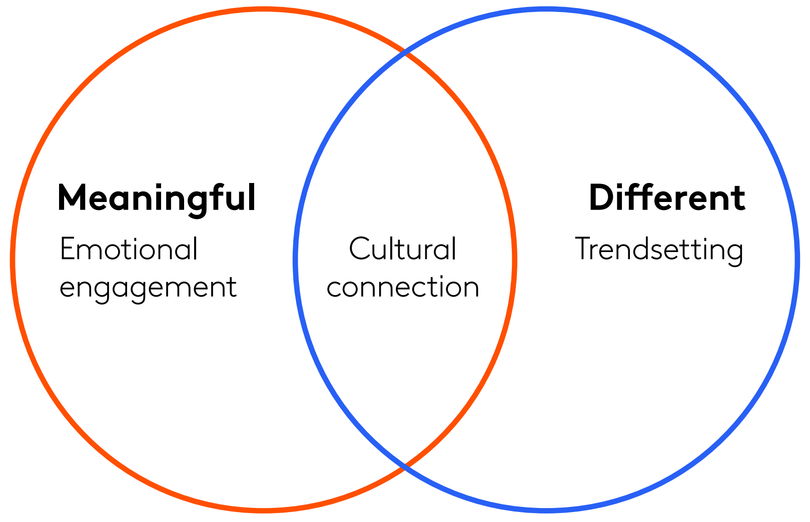


DECISION INTELLIGENCE
THE CULTURE CHOICE – ALIGNING WISELY

ONLY CONNECT

Building Meaningful Difference can be challenging in the real world, for the simple reason that most people don't inherently care about brands.

Rather than pretend otherwise, smart brands find ways to bring themselves closer to the things that really matter to people. They inject themselves into a targeted range of resonant cultural moments. When done correctly – with the right decision intelligence around 'brand fit' and purpose – these cultural connections allow brands to share in genuine instances of emotional engagement and trendsetting, *without* having to pretend to be something they're not.



Connect emotionally.
Create feelings of pride, nostalgia, or happiness that build lasting associations.

Set the trends.
Lead the way in the category with moments that are authentic to you.

To learn more about decision intelligence, explore our Expert Insights.

PATHWAYS TO CULTURE

PARTNERSHIPS

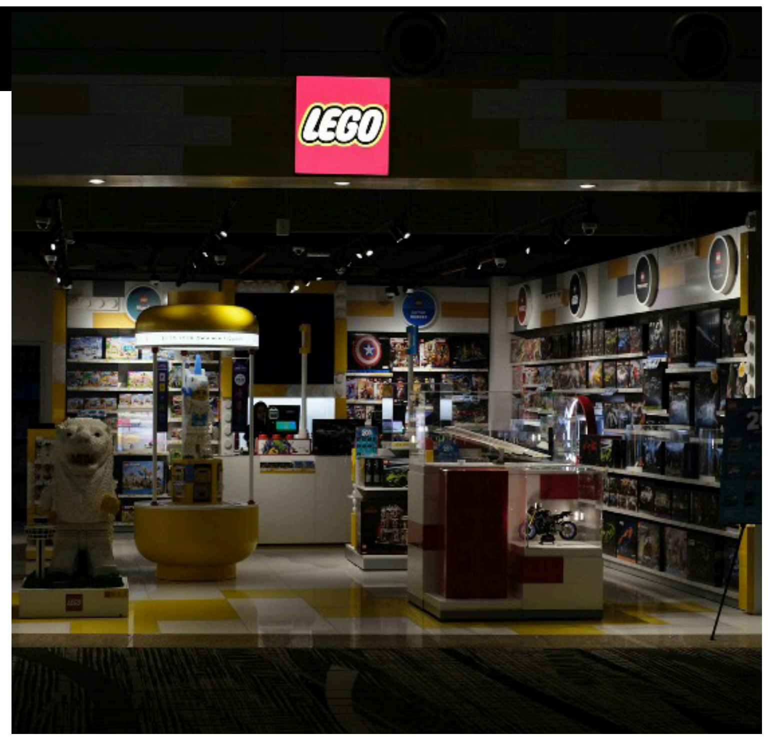
Collaborating with other brands or individuals to reach new audiences or to highlight values.

Nike and SKIMs partnered to create a women's line designed to bring together Nike's sports science and innovation with SKIM's focus on fit and the female form. While BrandZ data shows Nike is the most Meaningfully Different sports brand in the world, it still has an opportunity to better connect with a female audience.

EXPERIENCE

Connecting with people with experiential activity to bring brands to life at key purchase moments or social engagements.

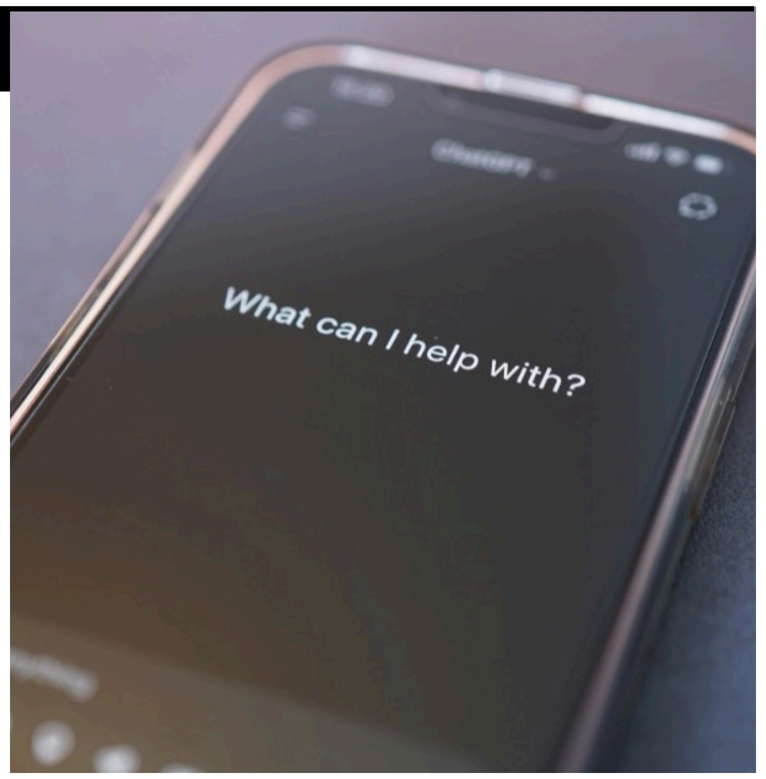
For Children's Day, LEGO created "Inspiration Wonderland", an interactive pop-up play space inside shopping malls across nine Chinese cities. Blending digital and physical play, LEGO is the most Meaningful childen's brand.



STORYTELLING

Evoking an emotional response by telling stories that leave people feeling something.

ChatGPT's 2025 campaign shifted towards human, everyday stories of people using ChatGPT in real moments. Designed to feel relatable and warm, this emotional layer helps ChatGPT to stand apart in a category where functional parity arrives fast.



COMMUNITY

Creating conversation or communities by focusing on things that matter to them.

Sephora builds Meaning through its Beauty Insider Community, a dedicated space where members ask questions, share recommendations, join groups and start conversations with other beauty lovers. This community forges strong emotional connection for Sephora in markets around the world.

STRATEGIC INTELLIGENCE
IDENTIFY YOUR BRAND'S CHIEF MARKETING OBJECTIVE

Your brand is your company's most valuable asset. Kantar BrandZ evidence has shown that strong brands consistently outperform others, generate better returns for shareholders, and protect businesses in uncertain times.

On some level, most executives – certainly most *marketing* executives – grasp this.

What's less obvious is which aspect of brand building to prioritise at any given moment. Brand building is multifaceted, while time and resources are finite. This raises the question: What facet should *your* brand focus on today – if the ultimate goal is to grow quickly, efficiently, and with an eye toward sustained long-term success?

To answer this question, you'll need the right strategic intelligence. Strategic intelligence is what you get when you combine proven frameworks for brand value growth with up-to-the-minute holistic intelligence about where brands stand in the marketplace. (That is, with respect to consumer perceptions and relative to their competitors.)

At Kantar, we have just such a framework: the Blueprint for Brand Growth. This year, we trained our intelligence engine to take a 'Blueprint view' of our trove of branded business data. Through simultaneous analysis of many equity metrics, we then built a 'strategic advisory engine' capable of identifying a brand's single biggest opportunity to unlock growth.

We have come to think of these opportunities as **Chief Marketing Objectives**.

Our approach is based on a journey. It first identifies those brands that lack a sense of Difference, the first essential component for growth, followed by those that lack a Meaningful connection with consumers. It then considers other areas such as justifying price point, building Salience, and being more Present in the market. It identifies brands that need to Gain Momentum, as well as smaller brands that should be challenging category leaders. The approach finally progresses through to identifying brands that are getting more or less everything right and should be looking to grow by Finding New Space.

The 10 Chief Marketing Objectives are:

DIFFERENCE FIRST
For brands that need to define and build their initial North Star of Difference.

EXTEND DIFFERENCE
For brands that lack Difference relative to competition.

DEVELOP MEANING
For brands that are less Meaningful than competition

SUPPORT PRICING
For brands without the necessary Pricing Power to support their perceived price.

BUILD SALIENCE
For brands that are not Salient relative to competition.

PREDISPOSE MORE PEOPLE
For brands without strong Demand Power and an overreliance on activation.

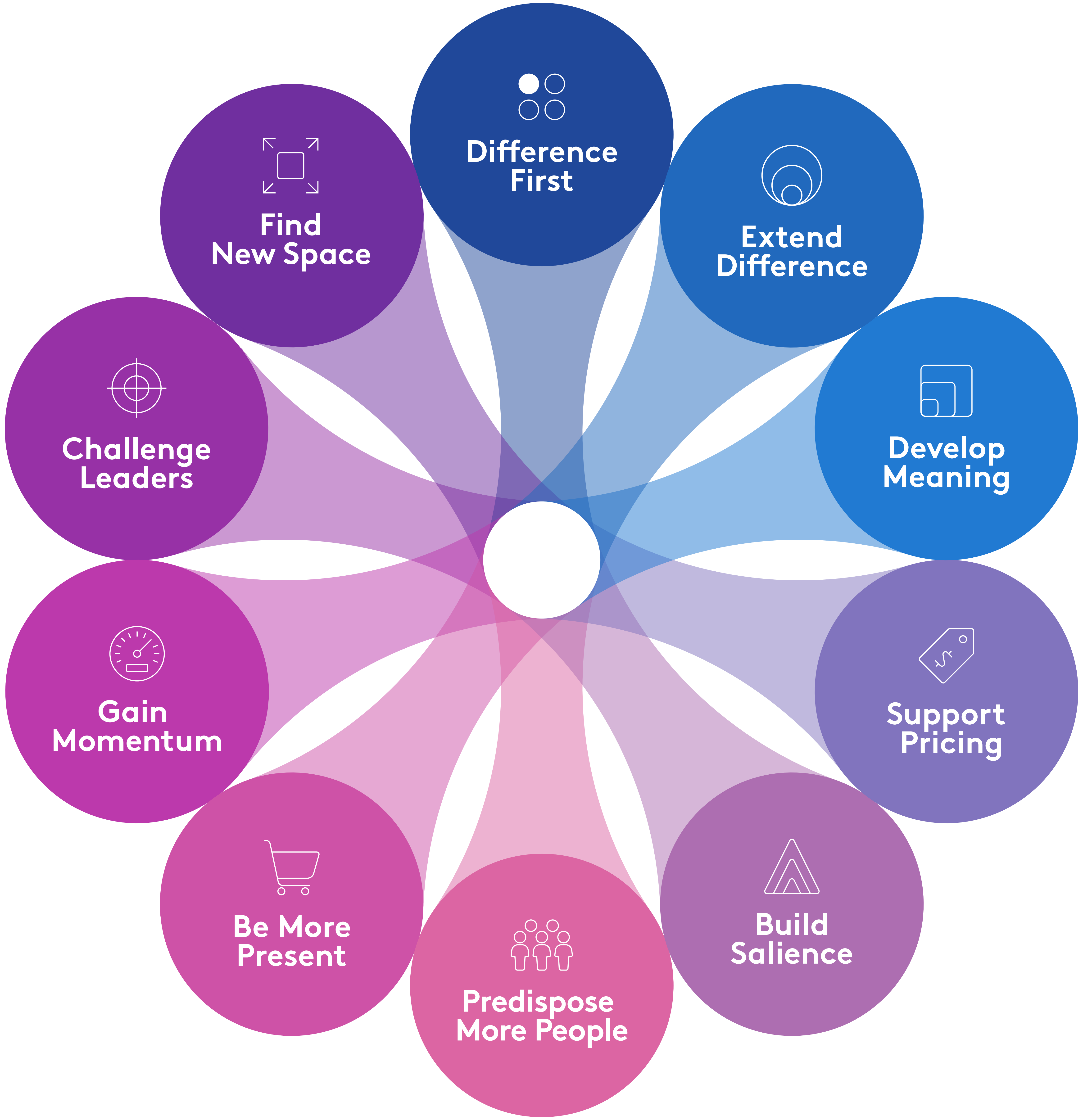
BE MORE PRESENT
For established brands with strong equity, but that miss out at key buying and decision points.

GAIN MOMENTUM
For brands that are in a steady state but lack Future Power, reducing growth prospects.

CHALLENGE LEADERS
For strong small brands with outsize Future Power.

FIND NEW SPACE
For strong large brands with outsize Future Power.

IDENTIFY YOUR BRAND'S CHIEF MARKETING OBJECTIVE



STRATEGIC INTELLIGENCE
FINDING LONG AND SHORT-TERM GROWTH

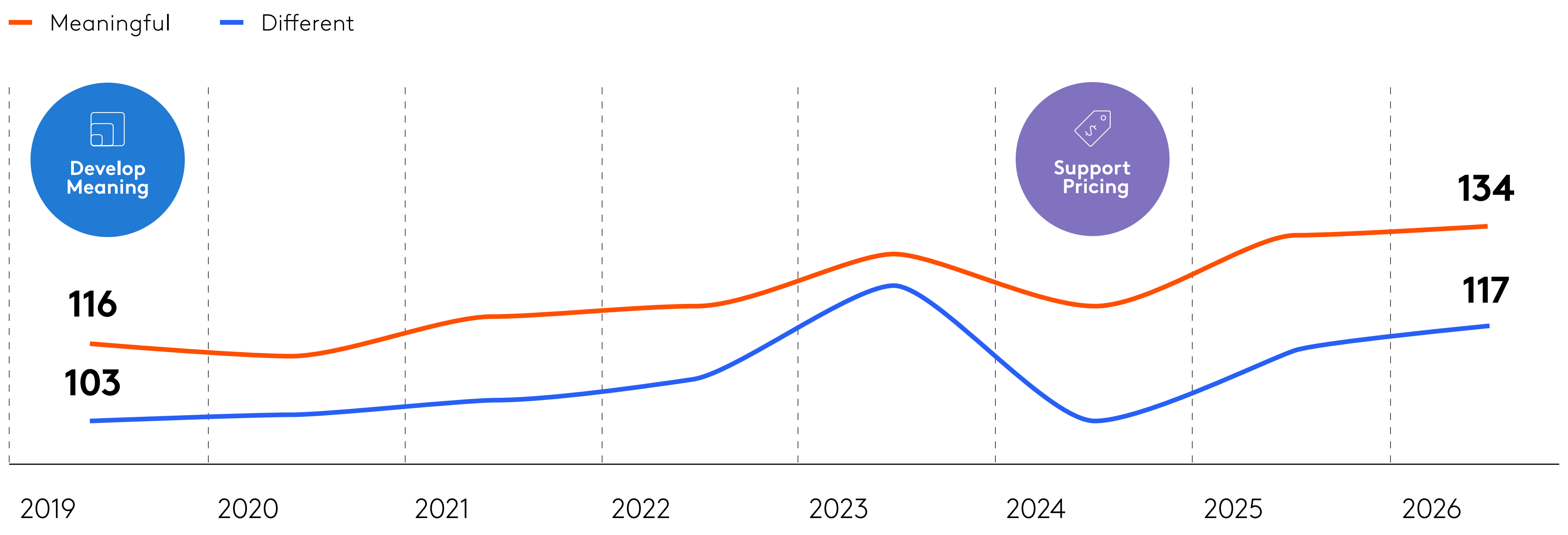
A DYNAMIC PROGRESSION

The Chief Marketing Objectives are intentionally ordered. For instance, brands cannot Gain Momentum without first establishing a baseline of strong Meaningful Difference. In the long run, however, strong brands tend to move fluidly across them. Brands may need to reprioritise 'earlier' marketing goals – if that's what your strategic intelligence demands.

New competitors, media shifts, category trends, inertia: lots of factors can affect a brand's equity perceptions. When they do, it pays to reframe marketing's next job.

McDonald's is a good example of how strong brands use strategic intelligence to prioritise the right Chief Marketing Objective. During the pandemic, McDonald's had to refocus on people's shifting needs to stay Meaningful with more delivery options. McDonald's expanded loyalty programmes and introduced 'adult Happy Meals'. But then, in 2024, rising food costs impacted its affordability. In response, McDonald's turned to a different Objective: 'Support Pricing.' This meant rolling out a $5 meal bundle in its home market of the US, as well as similar deals abroad.

McDonald's Meaningful and Different Index
Chief Marketing Objectives



Source: Kantar BrandZ, McDonalds, Global Data, Fast Food

BUILDING BRANDS TO WIN TOMORROW

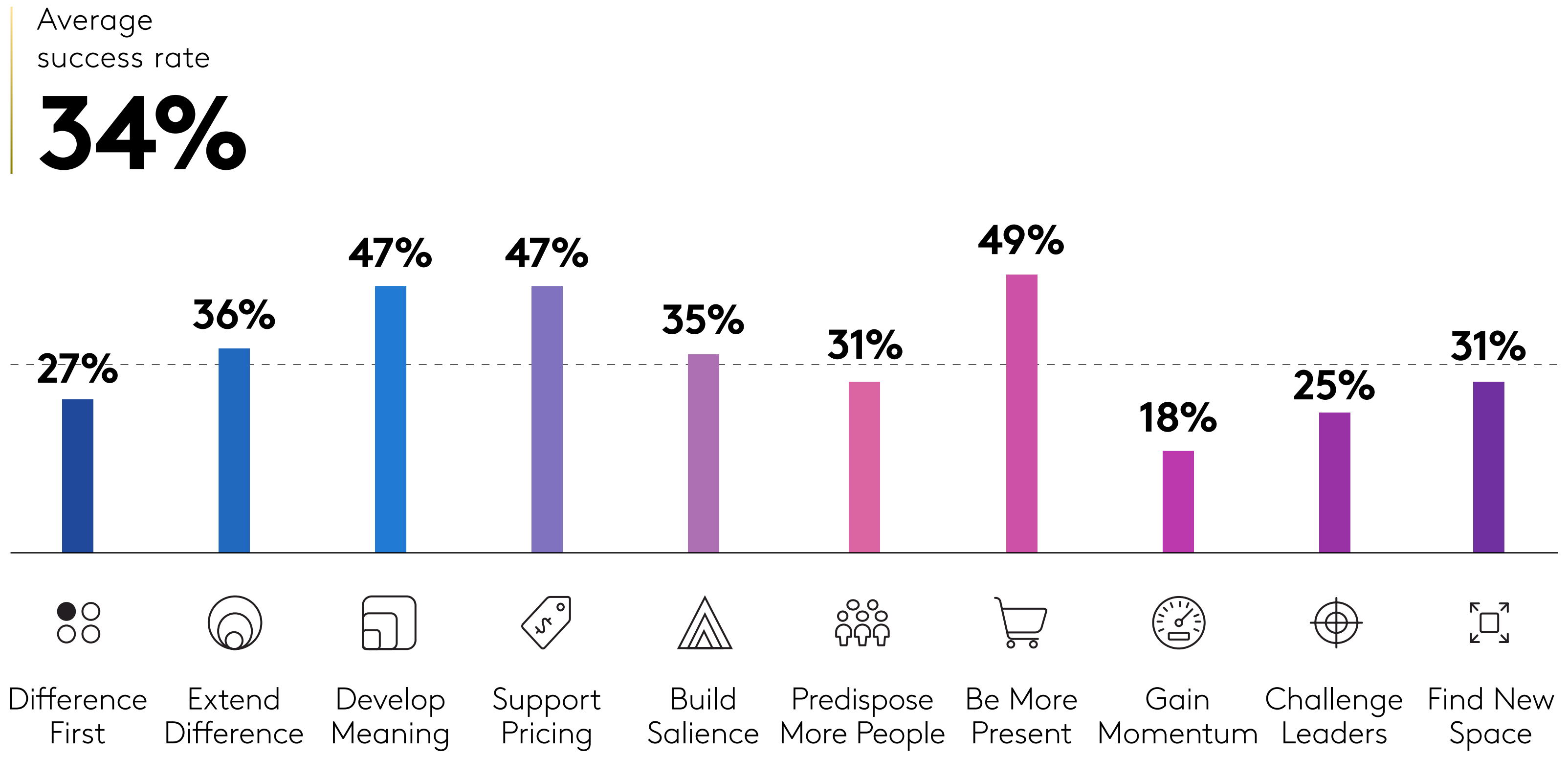
Marketing is challenging work. Overall, only 34% of brands analysed by our intelligence engine achieved their given Chief Marketing Objective within two years.

That said, though all of the Chief Marketing Objectives are necessary, some are harder to achieve than others. And these differences can tell us a lot about the art and science of brand building. For example, a higher proportion of brands succeed at using their extra Future Power to Challenge Leaders and Find New Space, than succeed at amassing Future Power in the first place. The lesson? It's easier to keep momentum than to gain it.

Similarly, if a brand's sales are lagging, it's easier to address an activation issue (Be More Present) than it is to address a lack of Demand Power (Predispose More People).

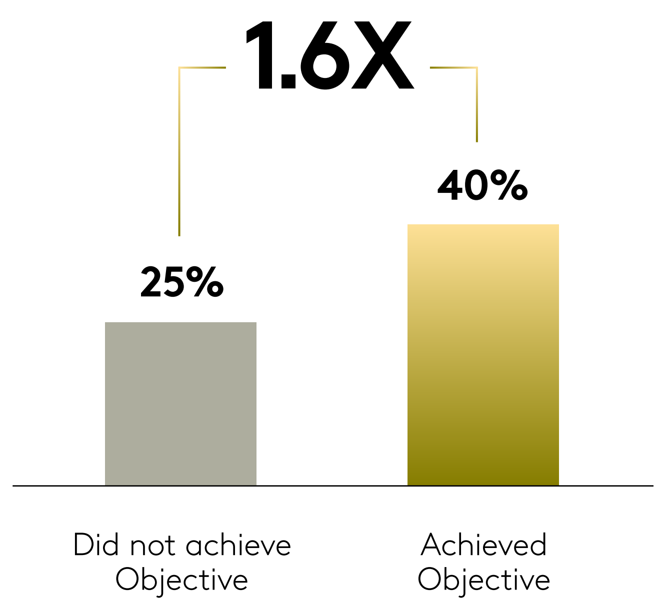
We then looked at whether brands' success in achieving Chief Marketing Objectives had any overlap with success in increasing penetration. Forty percent of brands that achieved their Chief Marketing Objective also increased penetration, compared with just 25% of the brands that pursued other Objectives or simply failed to deliver on their marketing plans. That's a 60% better chance of success in making your brand grow.

% of brands achieving Objective over a two-year period



Source: Kantar BrandZ database analysis of 10,258 brands, 2014-2025

Chance of penetration growth



Penetration growth = Bought last increase 1%pt or more
Source: Kantar BrandZ database, analysis of 10,258 brands, 2014-2025

STRATEGIC INTELLIGENCE
THE CATEGORY AND COHORT VIEW

A NEW PERSPECTIVE ON THE WORLD OF BRANDED BUSINESS

By overlaying a Chief Marketing Objective lens onto categories and cohorts, Kantar intelligence can help us with questions like:

- What marketing problems predominate in different categories?
- What brand-building imperatives are marketing executives most challenged by?

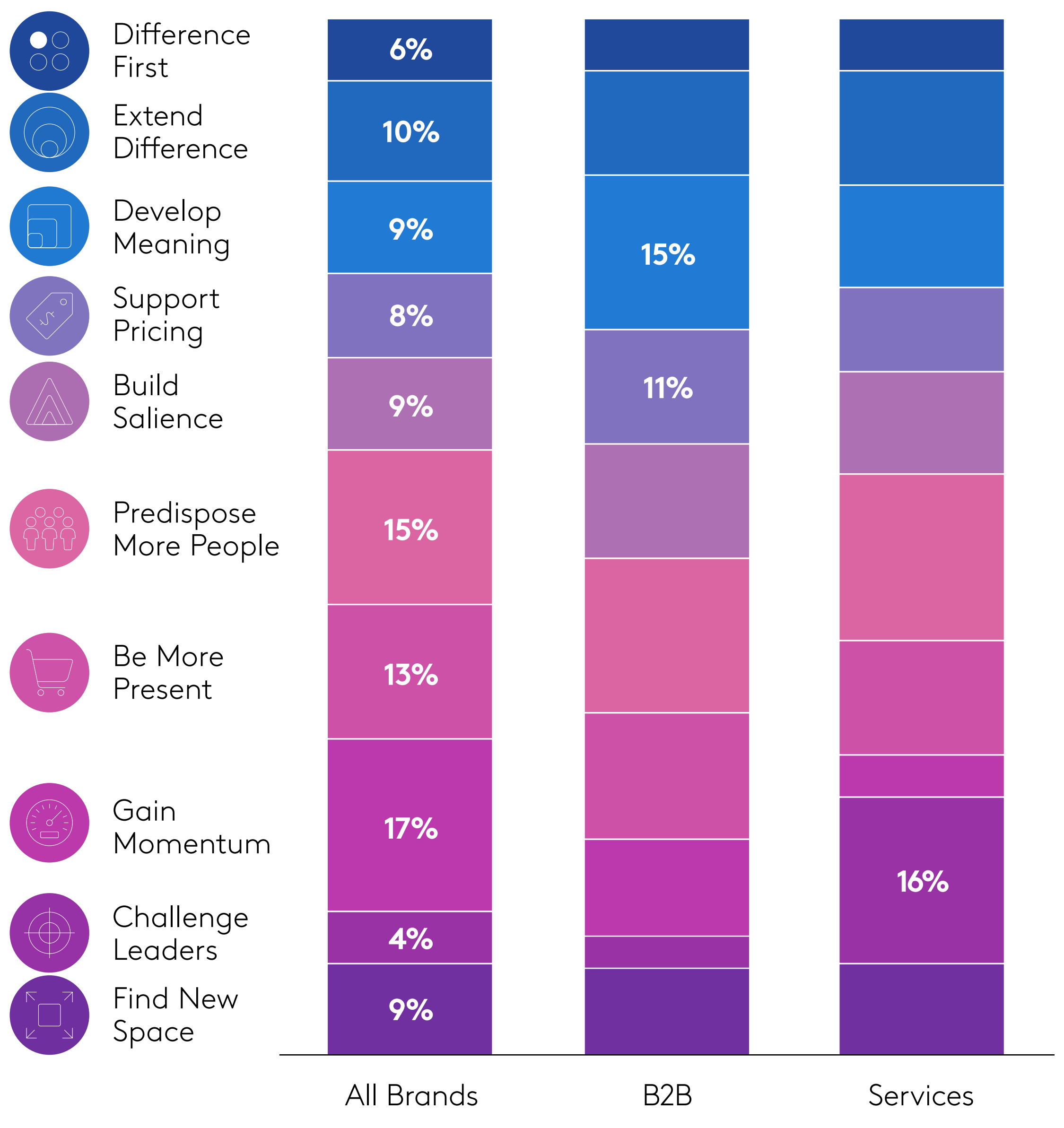
Some managers of 'store-owned brands' aren't thinking much about marketing at all, it seems. Sixty percent of these brands are fully stuck at the beginning, with a challenge of Difference First.

The distribution equalises when we move to consider all brands in the BrandZ database. The largest typology is Gain Momentum, representing one out of every six brands. These brands are already quite large, but they need to gain (or regain) Future Power to unlock further growth.

Zooming in on B2B, we see a notable cluster around Develop Meaning and Support Pricing.

Services, meanwhile, features a strong cohort of brands looking to use Future Power to Challenge Leaders. So legacy players in this space should be on notice, working to shore up their own approaches to brand intelligence.

% of brands with each Chief Marketing Objective



Source: Kantar BrandZ database, analysis of 24,363 brands, 2022-2025

WORLD'S TOP BRANDS CLUSTER AROUND MORE 'ADVANCED' STRATEGIC GOALS

The top brands ranked in this report have achieved many objectives that others have not. They've defined their Meaningful Difference, and have achieved strong Pricing Power and Predisposed More People.

Yes, market shifts may sometimes force these brands to revisit previous challenges. That's why they still need to monitor brand equity signals – and act decisively if they falter.

But generally speaking, they're focused on **seeking growth by finding new space** (within adjacent categories, markets, occasions, and demographics). And they're using great signal, decision, and strategic intelligence to do so.

% of Brand Value within each Objective

Source: Kantar BrandZ, Most Valuable Global Brands 2026, 211 brands

To learn more about strategic intelligence, explore our Expert Insights.

KEY RESULTS

GROWTH ACROSS THE BOARD

The overall brand value of the Global Top 100 increases by 22% for 2026. Its total value now stands at over $13 trillion, a new high for the Kantar BrandZ rankings. It's been a good year for top brands of all stripes: 70 of this year's 93 returning brands have grown since 2025.

GOOGLE'S BACK ON TOP

Google rises one spot on our list to retake the #1 spot from Apple, which had held it for four years. Google's increase of 57% has been driven by AI-led ecosystem monetisation at scale. In total, it amounts to well over half a trillion dollars in added brand value.

MEET THE TRILLIONAIRES

Last year, Apple was the only Top 100 brand with a value of over $1 trillion. This year, there are four: Google, Apple, Microsoft, and Amazon, in that order. (NVIDIA, this year's fifth-ranked brand, is close at nearly $815 billion.)

AI ACCELERATES

It's been a strong decade overall for the Global Top 100, with an annualised growth rate of +17% between 2020 and 2026. But this year's been even better. Why? In a word: AI. Monetisation of AI-based solutions has enabled the world's most effective brands to realise value even faster than before.

A MOST EXCLUSIVE CLUB

The threshold to enter the Top 100 stands higher than ever, at nearly $25.7 billion. That's thanks to some strong new entrants higher up in this year's rankings – but also the rising tide of AI-driven brand value growth overall.

MEDIA & ENTERTAINMENT BRANDS EXCEL

All 10 of the brands in our Media & Entertainment category ranking show up in the Global Top 100. Nine have grown their brand values year on year, (while the remaining one is virtually flat). This nets out to a 40% surge in overall brand value for the category versus 2025.

Platform giants YouTube, Google, Tencent/WeChat, and TikTok have seen especially strong growth this year – the latter two rising as part of an overall AI-driven comeback for Chinese tech brands.

RECOVERY CONTINUES FOR FINANCIAL SERVICES

Brands in the Financial Services Top 20 have grown 20% in total value versus 2025. This continues a multi-year rebound for the category, as most top names have regained investor confidence. Two Chinese banks re-enter the Top 100 this year, while North American banks all see double-digit growth.

KANTAR

IMAGINE A WORLD WHERE AI IS YOUR STRATEGIC PARTNER

Meet Kantar's validated AI solutions, powered by trusted data and deep brand expertise to transform marketing decision-making with speed, scale, and impact

BE MEANINGFULLY DIFFERENT TO MORE PEOPLE

Trained with **Kantar's Blueprint for Brand Growth**, over 10 years of thought leadership, and Kantar BrandZ data, **Kantar AI Assistant (KAiA)** mines multiple sources to unpack your brand's strategic direction and drive growth

PREDISPOSE MORE **PEOPLE**

Measure and optimise the impact of your campaigns at a hyper-granular scale with **LIFT ROI** and **LINK AI**

BE MORE **PRESENT**

Unpick the messy middle of the consumer journey with **BrandDigital** to identify how to better show up for your brand

FIND NEW **SPACE**

Discover emerging trends with **TrendEvaluate**, spark real-time ideation with qual at quant scale on **Kantar Live**, and test early concepts with **ConceptEvaluate AI** to uncover new growth opportunities

2

MOST VALUABLE GLOBAL BRANDS

KANTAR BRANDZ

2026 MOST VALUABLE GLOBAL BRANDS

Rank	Brand	Brand Value (US$M)	% Brand Value change vs 2025	Rank change vs 2025	Category	Market of origin	Brand Equity***
1	GOOGLE	1,484,895	57%	1	Media and Entertainment	US	■■■■
2	APPLE	1,380,294	6%	-1	Consumer Technology*	US	■■■■
3	MICROSOFT	1,111,788	26%	0	Business Technology**	US	■■■■
4	AMAZON[1]	1,022,820	18%	0	Retail	US	■■■■
5	NVIDIA	814,906	60%	0	Business Technology**	US	■■■□
6	FACEBOOK	366,624	22%	0	Media and Entertainment	US	■■■■
7	INSTAGRAM	286,158	25%	0	Media and Entertainment	US	■■■□
8	TENCENT[2]	251,551	45%	3	Media and Entertainment	China	■■■■
9	ORACLE	235,838	10%	0	Business Technology**	US	■■□□
10	MCDONALD'S	235,095	6%	-2	Fast Food	US	■■■□
11	VISA	228,570	7%	-1	Financial Services	US	■■■□
12	MASTERCARD	184,721	10%	0	Financial Services	US	■■□□
13	WALMART	176,706	48%	2	Retail	US	■■■■
14	YOUTUBE	168,547	89%	12	Media and Entertainment	US	■■■□
15	CHATGPT	167,765	285%	45	Consumer Technology*	US	■■■■
16	IBM	150,760	20%	-3	Business Technology**	US	■■■■
17	NETFLIX	139,422	21%	-1	Media and Entertainment	US	■■■■
18	TELEKOM/T-MOBILE	124,636	18%	1	Telecom Providers	Germany	■■■■
19	ALIBABA[3]	122,266	51%	10	Retail	China	■■■□
20	COCA-COLA[4]	121,324	1%	-6	Food and Beverage	US	■■■■
21	COSTCO	114,288	13%	0	Retail	US	■■□□
22	HERMÈS	113,136	3%	-4	Luxury	France	■■□□
23	TESLA	112,097	30%	5	Automotive	US	■■□□
24	AT&T	107,032	23%	3	Telecom Providers	US	■■■■
25	TIKTOK	98,436	30%	7	Media and Entertainment	China	■■■□
26	SAP	98,183	6%	-3	Business Technology**	Germany	■■□□
27	CLAUDE	96,577	N/A	N/A	Business Technology**	US	■□□□
28	AMD	91,089	61%	19	Business Technology**	US	■■□□
29	VERIZON	90,494	0%	-5	Telecom Providers	US	■■■■
30	CISCO	90,483	33%	6	Business Technology**	US	■■□□
31	THE HOME DEPOT	87,634	-2%	-6	Retail	US	■■□□
32	LOUIS VUITTON	87,532	-22%	-15	Luxury	France	■■□□
33	VMWARE	84,311	79%	22	Business Technology**	US	■□□□
34	ARAMCO	82,917	-11%	-12	Energy	Saudi Arabia	■□□□
35	AMERICAN EXPRESS	80,316	22%	2	Financial Services	US	■■□□
36	J.P. MORGAN	76,651	51%	13	Financial Services	US	■■■■
37	LINKEDIN	76,485	0%	-6	Media and Entertainment	US	■■□□
38	MOUTAI	73,630	-1%	-5	Alcohol	China	■■■□
39	MARLBORO	73,336	14%	1	Tobacco	US	■■■■
40	INTEL	69,108	85%	24	Business Technology**	US	■■■□
41	HUAWEI	68,156	5%	-2	Consumer Technology*	China	■■■■
42	STARBUCKS	66,210	-5%	-8	Fast Food	US	■■□□
43	CHASE	63,078	31%	10	Financial Services	US	■■■□
44	SIEMENS[5]	61,126	68%	23	Business Technology**	Germany	■□□□
45	UBER	58,186	32%	12	Consumer Technology*	US	■■■■
46	SALESFORCE	56,110	-19%	-11	Business Technology**	US	■■□□
47	INTUIT	55,516	-6%	-3	Business Technology**	US	■□□□
48	ADP	55,505	-3%	-2	Business Technology**	US	■■■■
49	MERCADO LIBRE[6]	54,998	10%	1	Retail	Argentina	■■■■
50	TEXAS INSTRUMENTS	54,924	-8%	-7	Business Technology**	US	■□□□

*Consumer Technology and Services Platforms, ** Business Technology and Services Platforms, *** The Brand Equity column summarises performance for each brand on a 4-point scale, based on Kantar's metric of Demand Power: the brand's ability to command current market share.

1. Amazon Brand Value includes Amazon Music, Amazon Prime Video, Amazon Web Services. 2. Tencent Brand Value includes QQ, WeChat, Tencent Music, WeSing, WeChat Pay, WeBank, v.qq.com, Tencent Cloud.
3. Alibaba Brand Value includes Alibaba Cloud, Ant Financial, AliExpress, AliHealth, Taobao, Tmall. 4. Coca-Cola Brand Value includes Lights and Diets. 5. Technology Conglomerate. 6. Mercado Libre Brand Value includes Mercado Pago.

Source: Kantar/Kantar BrandZ (including data from S&P Capital IQ and Euromonitor).

KANTAR BRANDZ

2026 MOST VALUABLE GLOBAL BRANDS

Rank	Brand	Brand Value (US$M)	% Brand Value change vs 2025	Rank change vs 2025	Category	Market of origin	Brand Equity***
51	CHANEL	53,127	-15%	-9	Luxury	France	■■■□
52	DISNEY	52,968	9%	0	Media and Entertainment	US	■■■□
53	HAIER	52,949	11%	1	IoT Ecosystem	China	■■■■
54	WELLS FARGO	52,904	20%	4	Financial Services	US	■■■□
55	RBC	51,480	17%	4	Financial Services	Canada	■■■□
56	SNAPDRAGON	51,053	-22%	-18	Business Technology**	US	■■■□
57	ICBC	50,513	49%	15	Financial Services	China	■■■□
58	ADOBE	50,511	-37%	-28	Business Technology**	US	■■■■
59	CHINA MOBILE	50,315	22%	3	Telecom Providers	China	■■■■
60	SERVICENOW	49,457	-21%	-19	Business Technology**	US	■□□□
61	SAMSUNG	48,736	67%	17	Consumer Technology*	South Korea	■■■■
62	AIRTEL	47,628	28%	4	Telecom Providers	India	■■■□
63	HDFC BANK	47,507	6%	-7	Financial Services	India	■■■□
64	ACCENTURE	45,240	-56%	-44	Business Technology**	US	■■□□
65	UPS	45,234	-18%	-17	Logistics	US	■■■■
66	ZARA	44,088	18%	-1	Apparel	Spain	■■□□
67	XBOX	43,972	2%	-6	Consumer Technology*	US	■■□□
68	COMMBANK	43,306	35%	6	Financial Services	Australia	■■■■
69	NIKE	41,188	-17%	-18	Apparel	US	■■■■
70	STRIPE	40,187	54%	15	Financial Services	US	■□□□
71	PING AN	37,219	41%	13	Financial Services	China	■■■□
72	DELL TECHNOLOGIES	37,124	5%	-3	Business Technology**	US	■■■□
73	L'ORÉAL PARIS	36,854	5%	-2	Personal Care	France	■■□□
74	IQOS	36,634	N/A	N/A	Tobacco	Japan	■■■■
75	MORGAN STANLEY	36,509	47%	15	Financial Services	US	■■■□
76	AGRICULTURAL BANK OF CHINA	36,332	54%	17	Financial Services	China	■■■□
77	BANK OF AMERICA	35,942	31%	4	Financial Services	US	■■■■
78	SPOTIFY	34,930	18%	-2	Media and Entertainment	Sweden	■■■□
79	SPECTRUM	34,904	-13%	-16	Telecom Providers	US	■□□□
80	BOOKING.COM	33,389	33%	9	Consumer Technology*	Netherlands	■■■■
81	XIAOMI	32,502	48%	15	Consumer Technology*	China	■■■□
82	TATA CONSULTANCY SERVICES	32,416	-43%	-37	Business Technology**	India	■□□□
83	KFC	32,180	20%	0	Fast Food	US	■■■□
84	TOYOTA	31,772	8%	-7	Automotive	Japan	■■■□
85	CHINA CONSTRUCTION BANK	30,302	N/A	N/A	Financial Services	China	■■■□
86	LOWE'S	30,094	-2%	-11	Retail	US	■□□□
87	CHINA LIFE	29,762	N/A	N/A	Financial Services	China	■■■■
88	XFINITY	29,580	-18%	-20	Telecom Providers	US	■■□□
89	HSBC	29,558	N/A	N/A	Financial Services	UK	■■■□
90	SONY	28,897	21%	2	Consumer Technology*	Japan	■■■□
91	EXXONMOBIL	28,097	10%	-3	Energy	US	■■■□
92	HILTON	28,036	22%	3	Travel Services	US	■■■□
93	ALDI	27,702	18%	1	Retail	Germany	■■■□
94	UNIQLO	27,284	26%	3	Apparel	Japan	■■■■
95	TD	27,065	N/A	N/A	Financial Services	Canada	■■■□
96	DOORDASH	26,533	27%	3	Consumer Technology*	US	■■■■
97	UNITEDHEALTHCARE	26,419	-25%	-27	Financial Services	US	■■■■
98	CHARLES SCHWAB	26,083	N/A	N/A	Financial Services	US	■■□□
99	FEDEX	25,739	7%	-8	Logistics	US	■■■■
100	BCA	25,663	-11%	-21	Financial Services	Indonesia	■■■■

*Consumer Technology and Services Platforms, ** Business Technology and Services Platforms, *** The brand equity column summarises performance for each brand on a 4-point scale, based on Kantar's metric of Demand Power: the brand's ability to command current market share.

Source: Kantar/Kantar BrandZ (including data from S&P Capital IQ and Euromonitor).

KANTAR BRANDZ RANK 2026
BRAND VALUE (US$M)

Brand	Rank	Brand value (US$M)
GOOGLE	#1	$1,484,895
APPLE	#2	$1,380,294
MICROSOFT	#3	$1,111,788
AMAZON[1]	#4	$1,022,820
NVIDIA	#5	$814,906
FACEBOOK	#6	$366,624
INSTAGRAM	#7	$286,158
TENCENT[2]	#8	$251,551
ORACLE	#9	$235,838
MCDONALD'S	#10	$235,095

1.Brand Value of Amazon includes Amazon Music, Amazon Prime Video, Amazon Web Services, 2. Brand Value of Tencent includes QQ, WeChat, Tencent Music, WeSing, WeChat Pay, WeBank, v.qq.com, Tencent Cloud
Source: Kantar/Kantar BrandZ (including data from S&P Capital IQ and Euromonitor)

TOP 10 BRANDS

A strong Top 10

The Kantar BrandZ Global Top 10 includes names from five different categories, with Media and Entertainment the most represented. NVIDIA is the fastest riser, increasing its brand value by 60% since last year. Google is next, growing by 57%. Tencent is third, growing by 45% as it returns to the Top 10 amidst a wider rally for Chinese tech brands. (Tencent's brand valuation includes QQ, WeChat, Tencent Music, WeSing, WeChat Pay, WeBank, v.qq.com, and Tencent Cloud).

Founded in 1940, McDonald's is the oldest and only 'pre-digital' brand in the Top 10 (though its app is now one of its most important sales channels and brand assets). All 10 brands have grown in 2026.

KANTAR BRANDZ RANK 2026
BRAND VALUE (US$M)

Brand	Rank	Brand value (US$M)	Status
CLAUDE	#27	$96,577	NEW
IQOS	#74	$36,634	NEW
CHINA CONSTRUCTION BANK	#85	$30,302	RE-ENTRY
CHINA LIFE	#87	$29,762	RE-ENTRY
HSBC	#89	$29,558	RE-ENTRY
TD	#95	$27,065	RE-ENTRY
CHARLES SCHWAB	#98	$26,083	NEW

Source: Kantar/Kantar BrandZ (including data from S&P Capital IQ and Euromonitor)

NEWCOMERS & RE-ENTRANTS

Claude leads Newcomers and Re-Entrants

More AI accolades: This year's most valuable Newcomer is Claude. It joins the Global Top 100 as a Business Technology and Services Platforms brand — reflecting its strength in areas like coding, science, data analysis.

China has the most re-entrants, while the US has contributed the most newcomers across our Global Top 100 ranking this year.

Brand	Brand Value Growth % vs. 2025	Category
CHATGPT	285%	Consumer Technology and Services Platforms
YOUTUBE	89%	Media and Entertainment
INTEL	85%	Business Technology and Services Platforms
VMWARE	79%	Business Technology and Services Platforms
NONGFU SPRING	71%	Food and Beverage
SIEMENS*	68%	Business Technology and Services Platforms
SAMSUNG	67%	Consumer Technology and Services Platforms
AMD	61%	Business Technology and Services Platforms
NVIDIA	60%	Business Technology and Services Platforms
GOOGLE	57%	Media and Entertainment
AGRICULTURAL BANK OF CHINA	54%	Financial Services
STRIPE	54%	Financial Services
J.P. MORGAN	51%	Financial Services
MONSTER	51%	Food and Beverage
ALIBABA	51%	Retail
ICBC	49%	Financial Services
XIAOMI	48%	Consumer Technology and Services Platforms
WALMART	48%	Retail
MORGAN STANLEY	47%	Financial Services
TENCENT	45%	Media and Entertainment

*Technology Conglomerate
Source: Kantar/Kantar BrandZ (including data from S&P Capital IQ and Euromonitor)

TOP RISERS

ChatGPT leads Top Risers

ChatGPT grew by 285% since 2025. In an increasingly crowded field, ChatGPT is still the best-known AI frontrunner. This year saw ChatGPT invest more heavily in mass-media brand-building activities, while also working to become an advertising channel in its own right.

YouTube is the second-highest riser this year, at 89%, and similarly combines strong brand equity with lucrative AI innovation. From Siemens to Xiaomi to Walmart, many of this year's Top Risers are building on previous years of positive brand value growth. But there are also comeback stories to celebrate. These include by Intel and Samsung in the Global Top 100, plus Nongfu Spring and Monster in the category rankings.

EXPERT INSIGHTS

Martin Guerriera
Head of Kantar BrandZ

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IN AN AI-DRIVEN WORLD, BRAND BECOMES THE ULTIMATE DRIVER OF CHOICE AND VALUE

SIGNAL INTELLIGENCE

The generative AI battle will not be decided by which model is the smartest. It will be decided by which brand people choose.

Two years ago, the generative AI category was defined by initial astonishment. Consumers marvelled at what these systems could do, while competitors raced to close technological gaps. Today, the conversation has already shifted. Capability is becoming the cost of entry, while choice is increasingly driven by brand.

This is the natural evolution of any fast-growing category. Early competition is defined by functional innovation, but as capabilities converge, differentiation becomes less a matter of what a product *does* and more about what it *means* to its users.

This is where brand building becomes the primary source of sustainable advantage – because it shapes choice, not just capability.

From technical marvels to Meaningful brands

Kantar BrandZ data shows how quickly generative AI has established itself, both as a segment and as a battleground for emerging brands. Still, in many major markets around (including the US, France, Brazil, and India), this battleground continues to be dominated in brand equity terms by its early champion: ChatGPT.

These days, ChatGPT is not only used, it is *chosen*. First-choice preference has grown substantially in the last two years, exceeding 50% in some markets and reaching as high as two-thirds of category users in some regions. This signals the emergence of true brand preference.

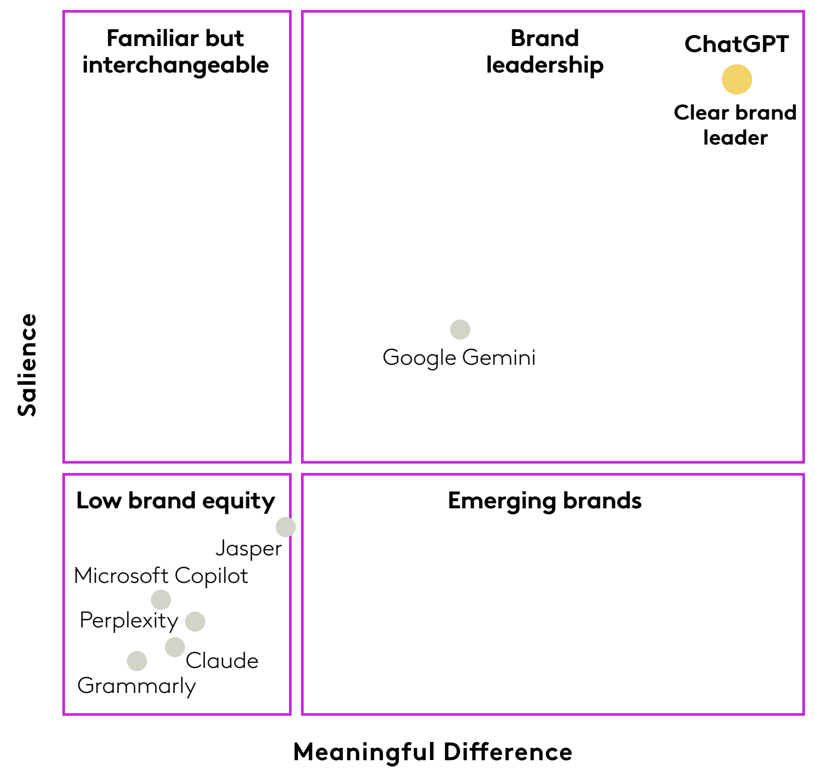
What's more, BrandZ analysis shows ChatGPT strongly outperforms category expectations on Meaningful, Different, and Salient – the three pillars of brand equity that underpin long-term growth.

This combination is rare. And so far, it's been strategically decisive. Meaningful brands meet people's needs and fit naturally into their lives. Different brands offer something distinctive that others cannot easily replicate. Salient brands come readily to mind in buying situations. ChatGPT is achieving strength across all three simultaneously, hastening its transition from technology leadership to brand leadership.

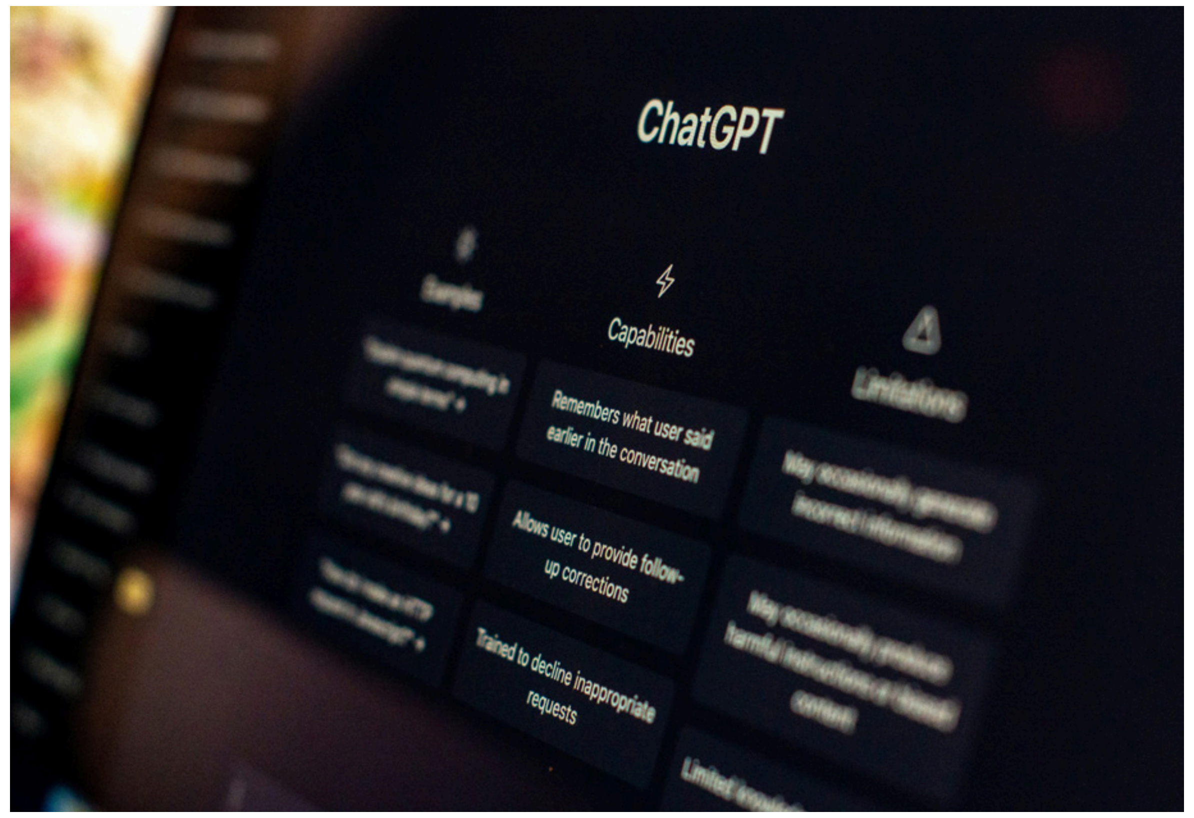
Why does this matter? Because Meaningful Difference expands penetration, strengthens preference, and creates Pricing Power. In short, it converts usage into enduring enterprise value. What's changing now is the speed at which this advantage is built and captured.

In an AI-accelerated world, the brands that win are not just those that build equity, but those that identify and act on signals of change earlier than others.

Brand equity determines leadership in generative AI



Source: Kantar BrandZ, Generative AI tools. Average of US, India, France, Brazil, 2025



A category maturing – and commoditising

Yet even as leaders emerge, the generative AI segment at large is rapidly commoditising.

While many competitors have achieved reasonable levels of Salience, few have established strong perceived Difference. Kantar BrandZ data shows that most LLM providers' perceived differentiation scores remain clustered together in the lower range for Difference. What this means is that most providers are still interchangeable in consumers' minds.

Again, there's precedent here. As functionality converges in any category, consumers struggle to distinguish based on technical specifications alone. For generative AI specifically, this means that model size, speed, and integration do not necessarily create choice. More often, in fact, they lead to parity – leaving *emotional meaning* as the surer bet for influencing preference.

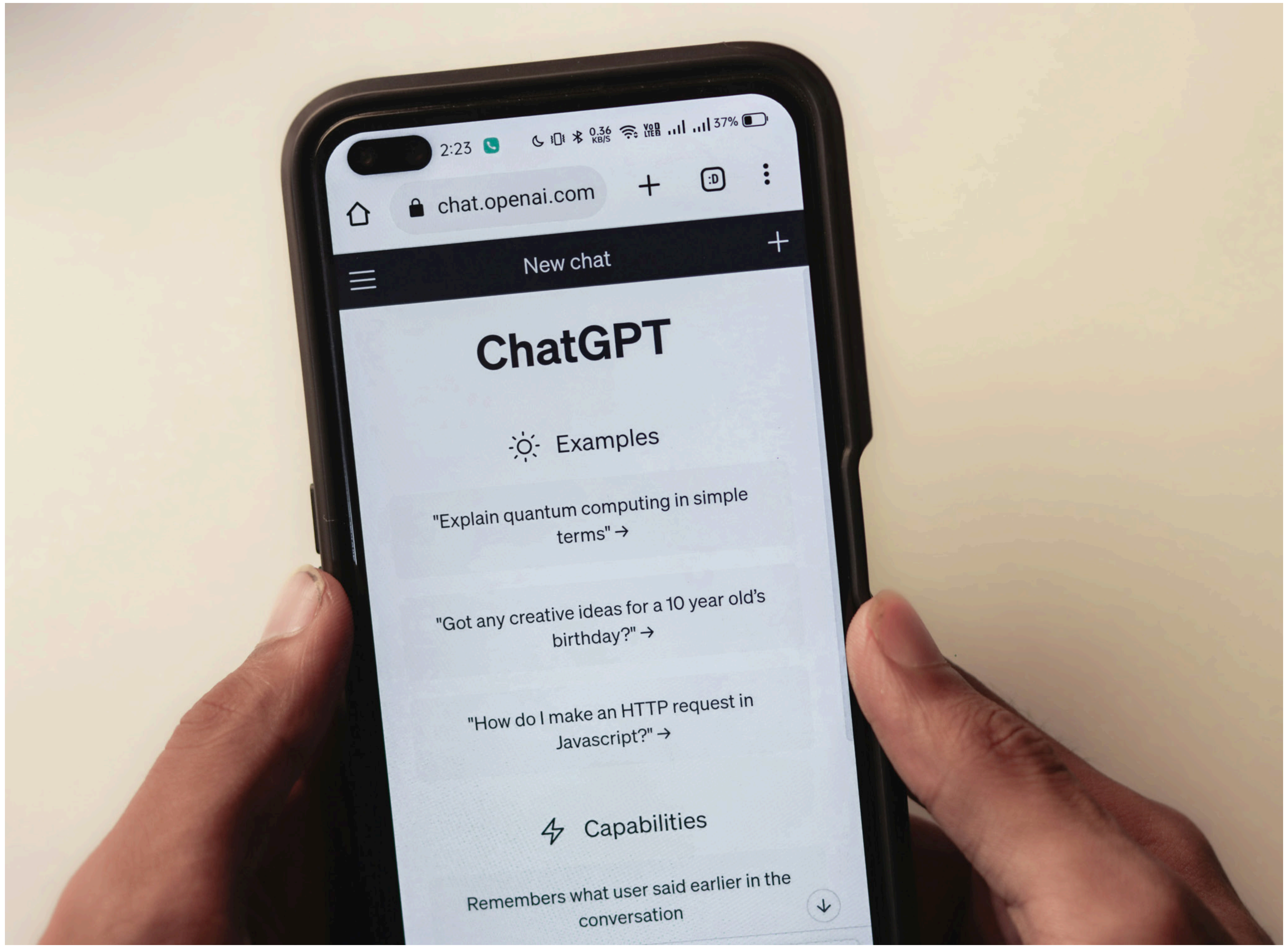
For most brands, the opportunity now is to build Meaningful Difference early, before categories fully commoditise; and then to scale it consistently through experience, communication, and innovation. Brands that accomplish this early on can push ahead of the pack to become 'anchor' brands for the category: the standard bearers for how generative AI brands should look, feel, and connect with consumers. Achieving this can open a widening brand equity gap over the rest of the field.

ChatGPT's current equity advantage works as just this kind of virtuous cycle: stronger brand equity drives preference, preference drives usage, and positive usage experiences reinforce equity.

Perhaps the clearest signal of this evolution is visible in ChatGPT's own marketing, which has shifted decisively away from technical superiority *(how it works)* to human value *(what it enables)*. Instead of highlighting model architecture or performance metrics, the focus of ChatGPT's mass-media communications has moved to how it's uniquely meeting needs: how it can expand people's cognitive capabilities while enabling their creative potential.

This type of messaging is perfect for building (and defending) Meaningful Difference. And sure enough, ChatGPT scores strongly on emotive BrandZ attributes such as 'Fits well into everyday life', 'Makes life easier', and 'Leading the way'. In contrast, many competitors remain positioned primarily around capability or integration. They're betting heavily – and riskily – on the kinds of functional advantages that can swiftly erode. As capability converges, competitive advantage shifts from what brands do to how consumers perceive and choose between them.

This makes the continuous, real-time understanding of consumer signals critical to decision making.



What this means for *all* brand marketing

Looking ahead, brand will play a defining role in how value is created in AI ecosystems.

As AI becomes embedded into everyday workflows, the decision of which system to use will continue to be driven by trust, familiarity, and emotional affinity.

Consumers will choose brands that align with their identity, values, and aspirations. The winners will be those that achieve not just functional superiority, but Meaningful Difference at scale. Critically, those choices will increasingly be shaped in real time, making it essential for brands to continuously read and respond to the changing signals of consumer demand.

ChatGPT's trajectory suggests it is already making this transition: from category pioneer to enduring brand. Its huge acceleration in brand value of +285% in the last 12 months, bringing it up to more than $167 billion, has catapulted the brand to 15th place in Kantar BrandZ's Global Top 100. This signals the speed at which AI brands can create tangible enterprise value when equity and usage reinforce each other.

But lasting leadership is never static. History shows that strong brands are not those that innovate once, but those that continuously reinforce their Meaningful Difference as categories evolve and commercialise.

Advertising recommendations are already showing up in an AI chatbot near you; the free version of ChatGPT now features integrations for 'sponsored' content, though without influencing answers. Will this shift level the playing field? Not likely: instead, it will reinforce existing brand advantages.

And then there are AI shopping agents. Pre-existing brand affinity will increasingly determine which brands AI agents select, recommend, and prioritise.

When AI systems recommend products or services, they will favour brands that people already trust, recognise, and prefer. In this way, brand equity will influence not only consumer choice, but also the choices AI presents.

The implication is clear

In an AI-driven world, competitive advantage will not come from capability alone; it will come from brand-led choice.

The brands that win will be those that:

- Continuously read the signals shaping demand
- Act early and decisively on those signals
- Translate them into meaningful, differentiated experiences.

AI may power the system, but in the end, brand determines who wins within it.

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MASTERING MOMENTUM
WHAT FUTURE POWER CAN DO FOR YOU

SIGNAL INTELLIGENCE

Predicting marketing winners

Marketing success can sometimes appear unpredictable. New brands seem to emerge from nowhere while established names suddenly lose momentum. Yet beneath this surface volatility lies something far more stable: strong brand equity consistently helps brands beat the odds and outperform expectations.

At Kantar BrandZ, we combine the world's largest brand equity database with the Blueprint for Brand Growth and deep behavioural insight. This allows us to say confidently that future success is not random. Far from it: future success is measurable. It is trackable. And for many brands, it is already visible today – in the form of a unique signal called Future Power.

One key signal

Future Power is one of the most forward-looking indicators in Kantar's Meaningful Different and Salient framework. It assesses whether a brand's equity is larger or smaller than its current market footprint would suggest. In doing so, it connects consumer attitudes with actual market size.

It is the signal that tells you if your brand is poised for growth. If a brand's equity scores are higher than expected for its scale, it has 'extra' equity. If its equity is lower, it has a deficit. This matters because growth rarely begins with penetration. Instead, it begins with predisposition. Future Power quantifies this gap, and translates it into a single metric that shows whether your brand is building the right kind of early demand; later on, the market will catch up.

Future Power is often the secret early-stage ingredient behind breakthrough success. It shows that people are already predisposed to try, trust, or even recommend a brand that they have not yet bought. As a result, when distribution improves or communications scale up, the brand accelerates quickly because consumer momentum is already there.

Look at the brands that have become cultural and commercial giants over the last two decades. Tesla, TikTok, NVIDIA: even as smaller players, these brands 'punched above their weight' with outsized brand equity. And sure enough, their Future Power was visible long before their financial results caught up. On the other side of the spectrum, brands with low Future Power risk stagnation unless they rebuild Meaningfully Different associations.

Momentum enables growth

At its core, Future Power is about momentum. A brand with high Future Power enjoys growing recognition and perceived difference that encourages consumers to choose it when the moment of purchase arrives. This behavioural predisposition builds gradually in memories and expectations over time. Once built, it gives the brand an 'unfair' advantage at every touchpoint.

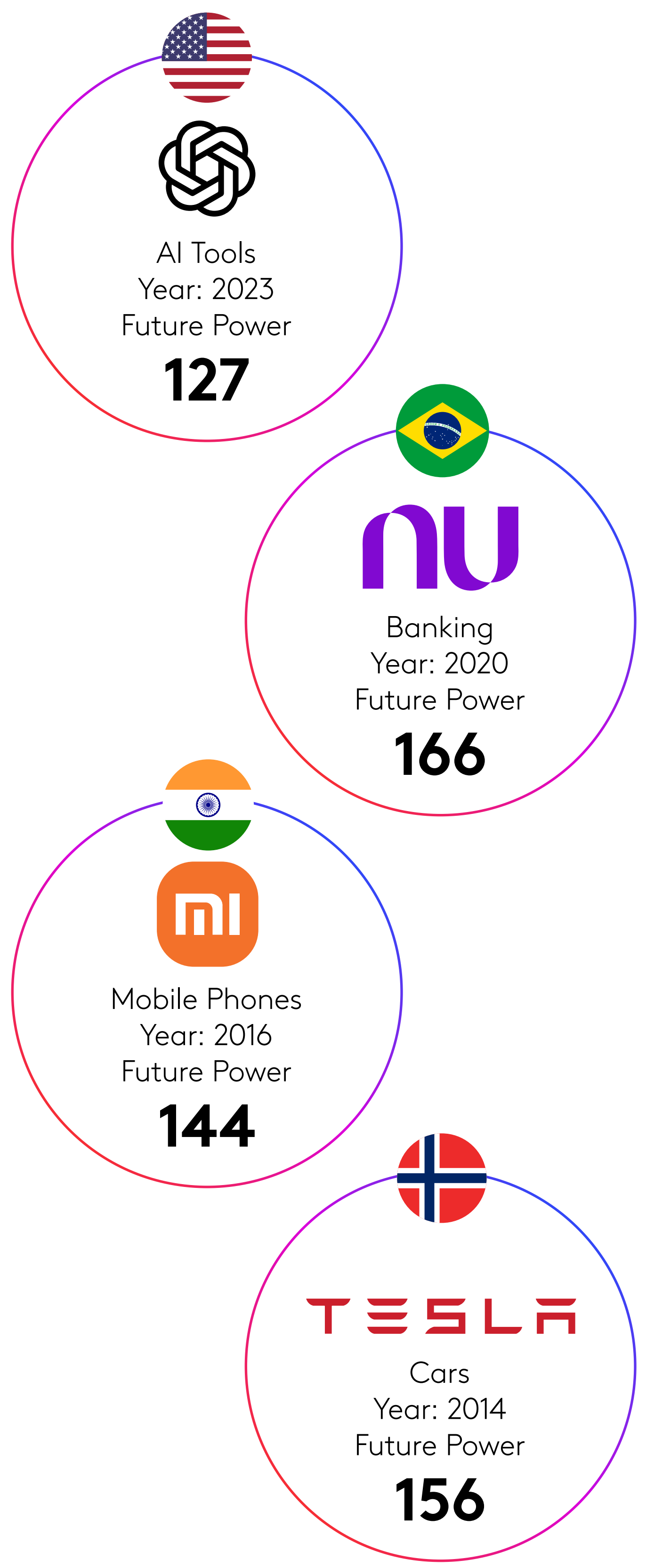
This is why brands with high Future Power typically see faster acquisition, greater conversion, and more efficient media performance. The groundwork has already been laid down, such that the brand feels like the obvious choice.

This indicator is obviously valuable for small or challenger brands. These brands often have limited reach or distribution, yet their future trajectory depends on whether people who do know them feel strongly enough to choose them. A small brand with strong Future Power is far more likely to scale than a larger brand with weak Future Power.

However, large brands also benefit. For these brands, Future Power acts as a warning system. It signals whether the brand is maintaining the mental advantage required to fuel future growth. A declining Future Power score can indicate an erosion of perceived difference or relevance, even if current sales remain strong. A rising score, meanwhile, signals renewed brand vitality.

Future Power therefore helps brands at every stage of maturity. It guides early-stage acceleration, fuels mid-stage expansion, and protects long-term leadership. In Kantar's Blueprint for Brand Growth, mature brands with high Future Power have the opportunity to find new space. These might include new usage occasions, new variants, new audiences, or expansion into adjacent categories.

Emergent brands with strong Future Power



Index scores compare to an average of 100

An essential marketing metric

Future Power is built into Kantar brand tracking and equity studies, so it can be monitored over time and linked to marketing activity. It is measurable and actionable.

By aligning Future Power with Blueprint levers and brand-specific driver models, marketers can identify which messages and experiences will strengthen predisposition most effectively. Whether the task is to build distinctiveness, sharpen functional credentials, or deepen emotional meaning, Future Power provides a clear signal.

Because when brands grow in consumers' minds, they grow in the market. And when you know your Future Power, you can predict your likelihood of becoming one of marketing's next winners.

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MORE THAN JUST A MOMENT
THE LONG GAME OF CULTURAL CAPITAL

DECISION INTELLIGENCE

It's 9am on Tuesday morning. Ten minutes into your stakeholder meeting, you hear the words you've been circling around for months: *We need to be more culturally relevant.* What now?

We talk about cultural relevance constantly. But too often we reduce it to tactics: borrowing a trending TikTok audio; slapping a blockbuster IP on a limited-edition line; jumping on a meme. These kinds of tactics may drive fleeting visibility, but they rarely translate into long-term brand impact.

And yet the basic instinct behind these activities is correct. Because the hard truth of our industry is that people don't inherently care about brands. What they *do* care deeply about are the many culturally structured forces that shape their lives: communities, shared rituals, art, language, aspiration… And it's these cultural signs that brands should keep in mind when trying to connect with people.

From there, the idea should be to embed your brand alongside these elements *for the long game.* Because not all cultural relevance is fleeting. Some of it accrues. And when it does, it turns into cultural capital: the relevance a brand earns by participating credibly in culture *over time.*

Building brand for the long term

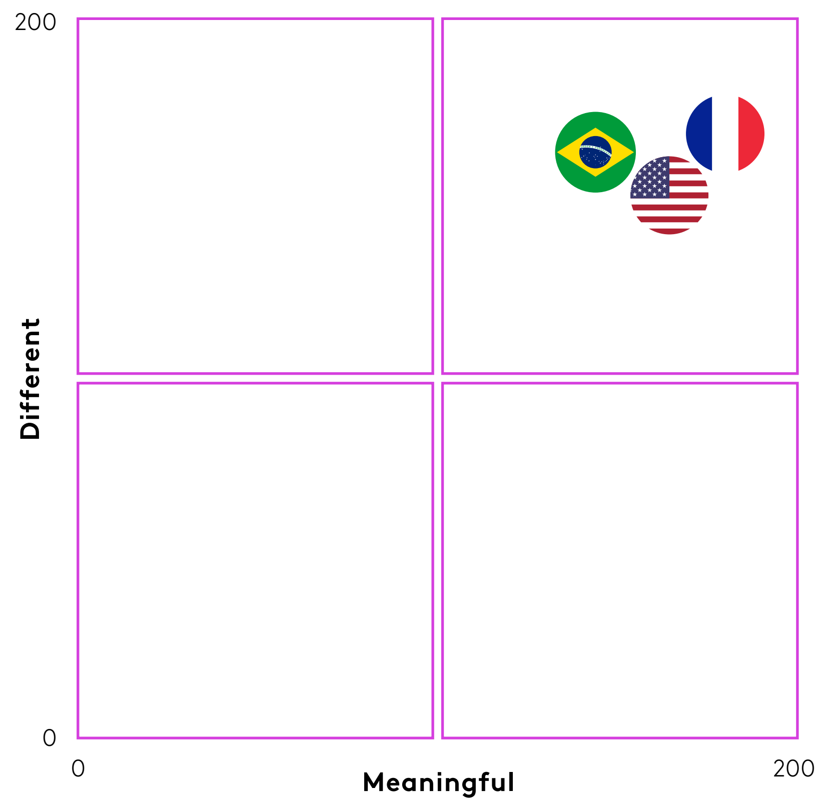
In essence, you should be aiming to do *through culture* what you already do in other marketing activities: form strong emotional ties with consumers based on shared values and vision, while standing apart from competitors by leading the way and setting the trends.

Sound familiar? These aspects of brand building are part of the framework we've talked about at Kantar for over a decade. Brands that are able to grow now and in the future are **Meaningful** to people, meeting functional and emotional needs. And they feel **Different** too, offering something that others don't.

One sector that clearly recognises the importance of long-term brand building is generative AI. Leading brands are racing to define what they stand for in the eyes of consumers – whether that's helper, co-pilot, creative partner, or enterprise efficiency tool. To that end, the major player brands are all airing campaigns to establish what makes them Meaningfully Different to people.

ChatGPT has a clear first-mover advantage here, and already demonstrates strong consumer connections according to the Kantar BrandZ data. Its 2025 campaign sought to shift perceptions even further: from a distant tech tool to a human-centric and relatable brand. To do so, the brand shook up its look and feel. Unusually for the sector, it took its visual cues from the world of cinema. The resulting work is more emotive and evocative – a strategic move to strengthen predisposition in a market where functional parity arrives fast.

ChatGPT brand equity



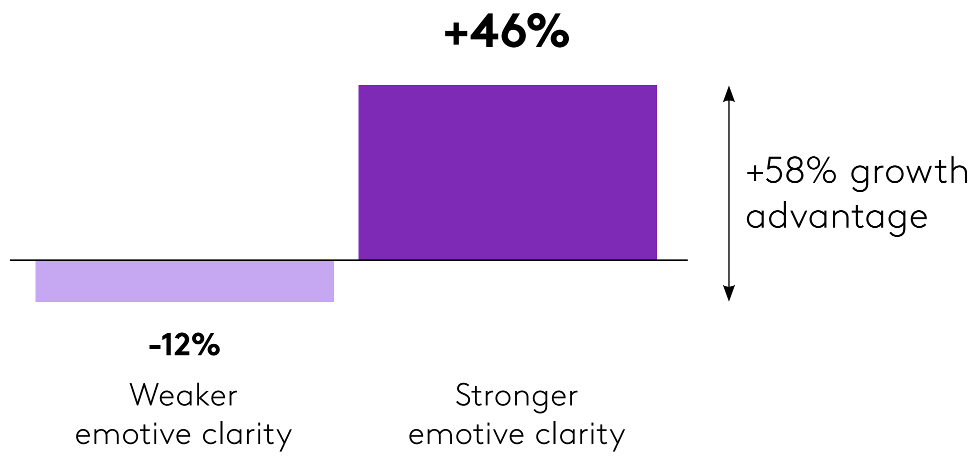
Source: Kantar BrandZ, AI Tools, 2025

Winning hearts and minds

Functional performance is the baseline for any brand, but not the be-all and end-all. People will buy a brand because it does what they need it to do. But they will come back to it – and advocate for it – in part because it makes them *feel something.*

In practice, functional and emotional associations are rarely separate. They reinforce one another in a loop. For a beauty shopper, that loop might sound something like this: *'I love how Charlotte Tilbury's makeup lasts the whole day – because when it does, it also makes me feel more confident'.* This is why brands that build strong emotional connections have better growth prospects.

Brand Value growth advantage



Source: Kantar BrandZ Most Valuable Global Brands 2006-2024

Brands that can make people feel something are often in tune with cultural momentum. Think of how Airbnb's 'Belong Anywhere' encourages inclusion and shared experiences, or how #LikeAGirl from Always empowers young girls.

Nike is renowned for its emotive campaigns. But crucially, the brand also manages to strike a chord with cultural conversation – whether that's taking a stand with Colin Kaepernick, or elevating women in sport with Serena Williams. These campaigns aren't just emotive words; they are attuned to real-world social discussion, amplifying topics that people really care about.

But enduring cultural resonance isn't always built off of big, powerful movements. It can also arise through simply reflecting our daily lives and needs. With Spotify Wrapped, Spotify has created an annual cultural ritual built from the 100 billion data points the brand collects on listener behaviour. Spotify Wrapped resonates with people because it reflects our own identity back to us, turning our listening habits into a personalised story of our year. It's also designed for social connection, creating a sense of belonging and community.

Spotify's annual Wrapped bonanza is thus a great example of a wider truth. To build cultural relevance, brands must know *everything* about their audience – their habits, their interests, their aspirations – and then turn those signals into strategic intelligence they can act on.

Consistency that compounds

A single, strong, culturally engaged campaign will only get you so far. What you want, ultimately, is to create a network of positive associations linked by your brand's core identity. Consistently distinctive assets and messages act as connective tissue linking every cultural exposure (campaigns, partnerships, activations) back to existing memory structures.

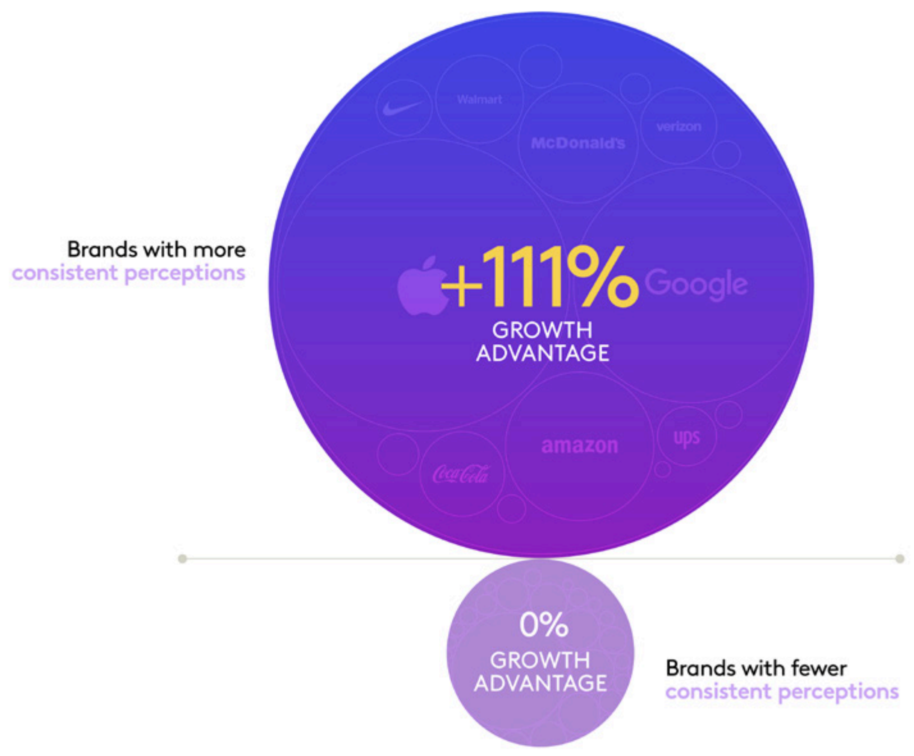
Little by little, these connections increase the chances that consumers are nudged towards your brand. It's for this reason that both Nike and Spotify have been able to build deep cultural capital: their cultural moments were not one-off flashes, but repeated expressions of what they stand for.

Clarity and consistency matter even more as agentic search reshapes the way consumers choose brands. Brands with clear, consistent, machine-readable codes will be easier for AI engines to surface, understand, and select.

These two attributes are also key to winning in today's influencer-driven social media ecosystem. Creator voices have made it easier for brands to show up authentically for their audiences – but only sometimes, it turns out.

In 2025, 74% of brands increased their creator marketing budgets. However, Kantar Context Lab data shows that only 27% of creator content is strongly linked to the brand. This suggests a consistent failure to feature clear brand assets. Improving on this score doesn't mean turning back toward fully centralised message control; there's not much point of working with creators if you're going to give them all the same rigid script to follow. But you do need to ensure that every partnership and creative moment connects back to the same core identity and brand assets.

Consistency maximises growth potential



Source: Kantar BrandZ Most Valuable Global Brands 2006-2025

MOVE BEYOND MOMENTS

There have never been more ways for brands to show up in culture, powered by richer signals, faster decisions, and smarter platforms. But presence alone isn't the win. The brands that will grow now and in the future are not chasing quick hits of 'cultural relevance'. Instead, they are deliberately building cultural capital with consistency and authenticity, making decisions grounded in real intelligence. So stop chasing short-term spikes and start measuring how you are shifting predisposition by showing up credibly, coherently, and consistently in the cultural spaces that truly matter.

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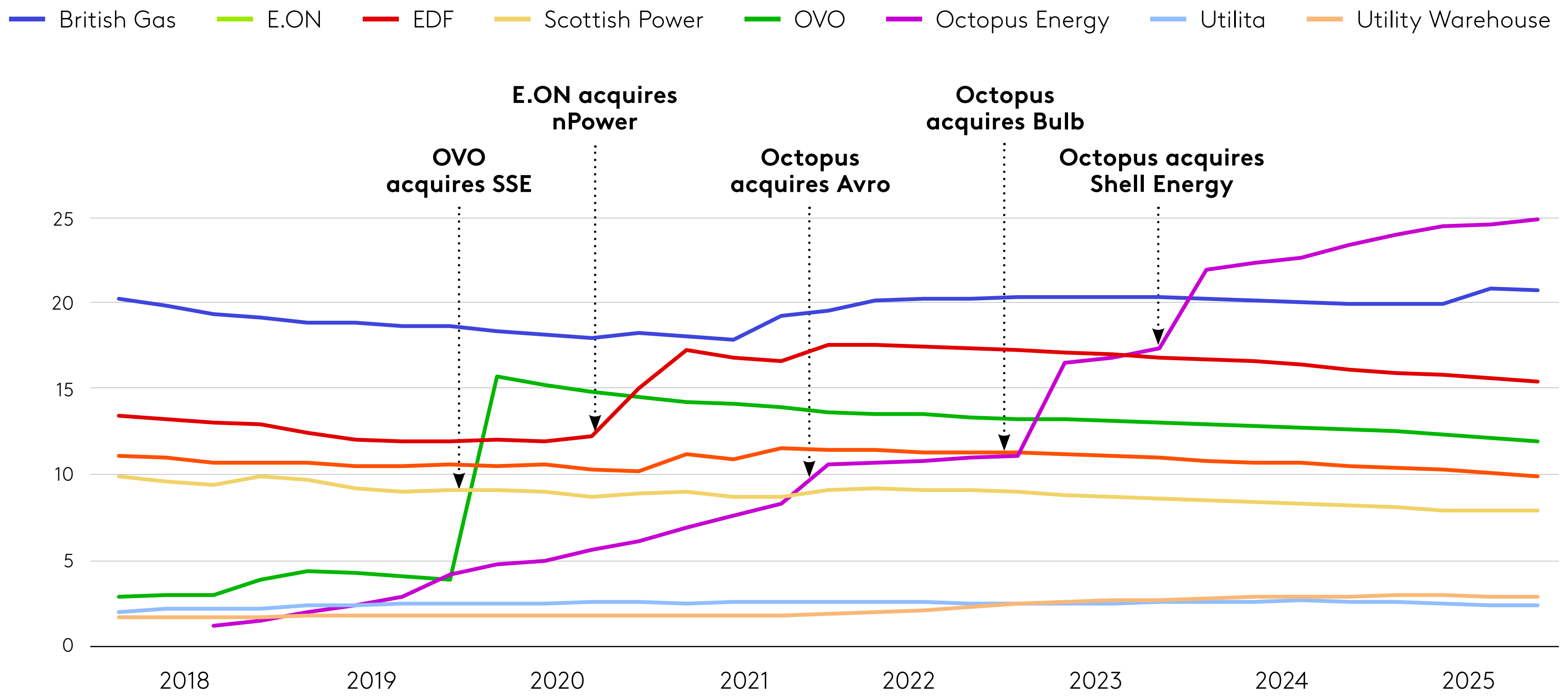
EXPERIENCE DISRUPTION
HOW OCTOPUS ACHIEVED STUNNING GROWTH FROM EXCEPTIONAL SERVICE

DECISION INTELLIGENCE

The utilities category is not where marketers might expect to find a disruptive superstar, even in the United Kingdom where the market allows some competition. Nor is it a category where brands excel at forging positive connections with consumers. In fact, according to the UK's Institute of Customer Service, this category is the *lowest-ranking* for customer satisfaction.

The stunning growth of Octopus
Market share (%)



Source: Ofgem, Kantar BrandZ, 2023

Over the last six years, UK-based energy supplier Octopus has achieved a scale of growth not previously seen in any sector. Its market share for electricity supply has gone from single digits in 2020 to the number-one spot in 2023, when it surpassed the category's long-time leader: British Gas.

Some growth has come from the acquisition of competitors. It took on 5% market share from Bulb in 2022 following its collapse, and 4.2% from Shell Energy in 2023 following its divestment. But since the end of 2021, Octopus has gained a whopping 5% market share with around 2.6 million customers from organic growth. Plus, it has successfully scaled its customer service to support this influx.

So, how did a brand emerge from a category with the lowest consumer satisfaction to become the UK's poster child for disruption through exceptional experiences?

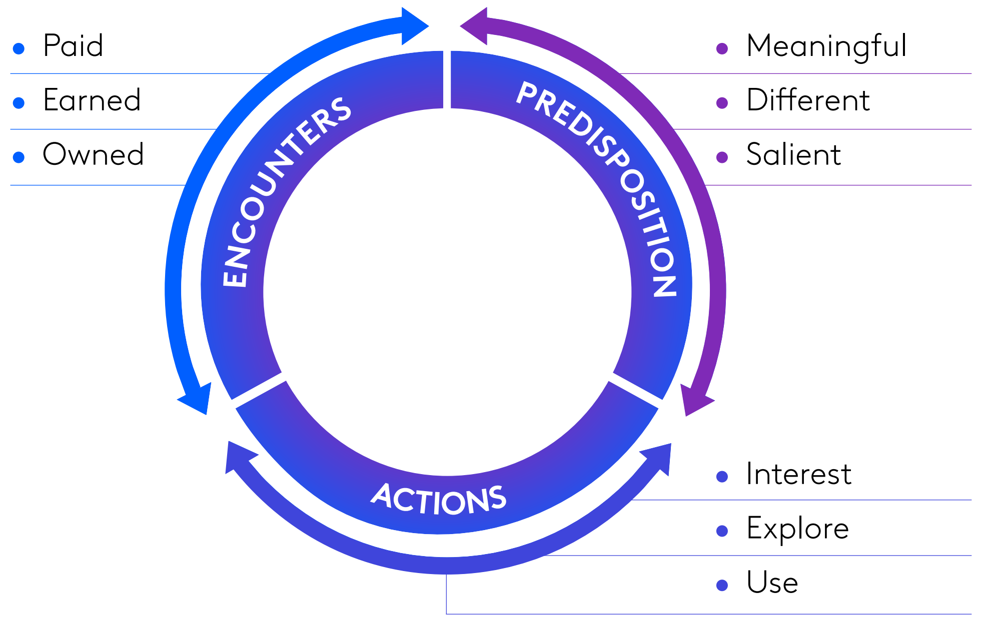
Encounters, predispositions, actions

Choosing an energy provider is not like grabbing a yoghurt off the supermarket shelf. When customers switch supplier - whether for a better deal or because they've had a bad experience elsewhere - it's a high-consideration activity.

Brand choice is influenced by lots of big and small encounters: marketing exposures, customer experiences, noise in the news, gripes from friends and family, independent reviews, and so on. These paid, owned, and earned encounters influence the customer's brand perceptions and future behaviour – they may be more likely to notice the supplier, or explore its website. This creates another encounter that further builds predisposition towards the brand; customers may perceive it as delivering on their needs (Meaningful), standing out from other brands (Different) or coming to mind quickly (Salient).

The experiences in brand-owned channels then become the primary source of brand perception, but all other marketing exposures and encounters continue to influence familiarity and feelings towards the brand.

Everything connects



I heard it through the power line

The scale of positive word of mouth – the extent to which consumers feel they have 'heard good things' about a brand – is a powerful signal that indicates how effectively the experience travels beyond existing customers.

Kantar BrandZ data shows that by 2025, nearly 40% of consumers said they had 'heard good things' about Octopus. In contrast, 31% of consumers said they had heard good things about British Gas, despite British Gas having 10 percentage points more consumer awareness than Octopus. Scale without the sizzle, so to speak.

The genuine substance behind the Octopus experience sets the brand apart and contributes to its growing recognition. Octopus topped the *Which?* UK consumer associations rankings for best energy suppliers in 2026. The brand has been a Which? Recommended Provider for nine years running.

Octopus amplifies this effect by sharing these accolades on its website and billboards. Its radio advertisements feature real customers celebrating how Octopus's call centre staff went the extra mile to resolve their issue.

Design for Difference

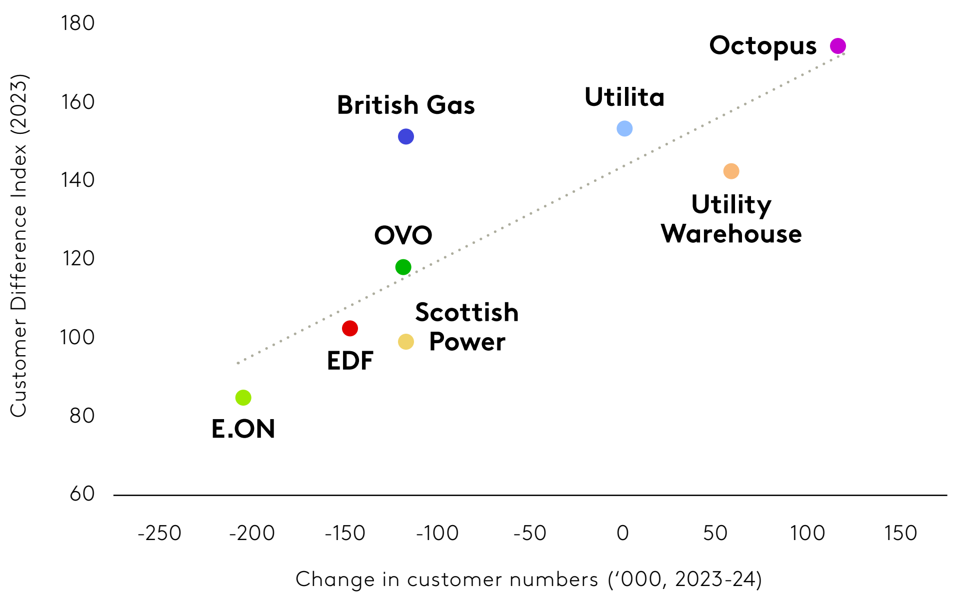
'We focused on differentiating ourselves through service, and we work relentlessly to build the technology and culture to deliver that', says Greg Jackson, Octopus CEO.

A simple belief has shaped Octopus from the start: 'Octopus Energy exists to provide cheaper, greener energy, with exceptional customer service for people in the UK', says Rebecca Dibb-Simkin, Chief Product and Marketing Officer. On this basis it has designed a differentiated experience that feels uniquely Octopus, with a disruptive streak. Their website showcases awards and customer reviews, but also the cost of energy wasted in the UK from switching off wind turbines due to grid inefficiency. Customers can join the Octopus Fan Club to be rewarded with cheaper energy when their local wind turbine is spinning, turning green energy into something with tangible customer benefit.

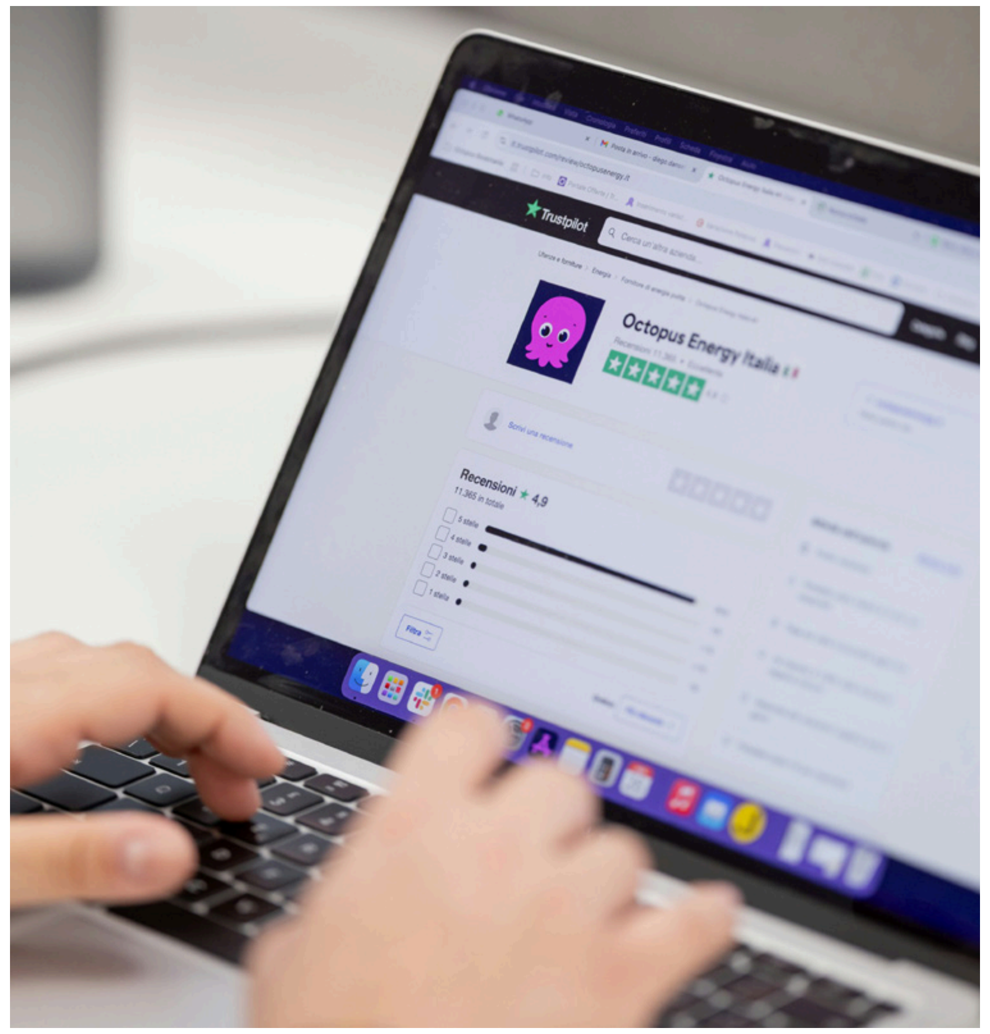
Octopus has designed for Difference by making everyday interactions more enjoyable. For example, customers not using automated smart meters are more likely to suffer nasty bill surprises. To avoid this, customers are encouraged to submit meter readings themselves, but uptake is often low. Octopus nudges customers into their spidery cupboards with the 'Wheel of Fortune', an app feature to win a prize every time they submit a reading. It is a clever way to reduce unpleasant bill shocks, leading to fewer calls to Octopus's contact centres. Everyone benefits.

The fastest-growing brands demonstrate their distinctiveness everywhere, including the design of their products and service. It goes beyond appearance. Customers should feel the overall experience is unlike any other supplier. Kantar's Customer Difference Index for UK utilities shows how Octopus leads the way, and how its performance predicts growth.

Customer Difference explains 72% of organic growth



Source: Ofgem, Kantar BrandZ, 2023



The double drag

Customers experiencing poor service are more likely to leave. But the drag is doubled when poor service becomes associated with the brand and reduces the likelihood that new customers join. People heed warnings from friends and family, and when researching a new supplier online, they are put off brands that score badly on industry rankings.

This reputational drag has real commercial consequences. The Customer Difference chart shows that from Q3 2023 to Q3 2025, OVO, E.ON, EDF, and Scottish Power declined in market share by one percentage point on average. This equated to an estimated annual loss of around 286,000 households and £14.3m in potential profit.

Most customers switching away from these brands went to Octopus, helping Octopus add 1.1 million new households between 2023 and 2025 alone.

When downward-trending word of mouth exceeds the levels expected for a brand of its size, this is a vital signal for the CEO. This signal intelligence keeps a pulse on how perceptions are changing, before they show up in churn figures.

Growing from experience

Customer experience should be evaluated by its contribution to growth; acquisition as well as retention.

Strong service creates advocacy. Advocacy builds predisposition in others. Predisposition influences switching behaviour. And these switching behaviours grow market share. The spectacular rise of Octopus shows what can happen when these elements reinforce each other.

In any category, brands must create experiences that people remember and share. They must ensure those stories travel. And they must gather the right signals to understand if these experiences make the brand seem different from everyone else.

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THE CREATOR GOLD RUSH IS YOUR BRAND WINNING?

DECISION INTELLIGENCE

Marketers are shifting serious budget to creators, more so than to almost any other channel. According to Kantar Media Reactions 2025, a net 61% of marketers globally plan to increase investment in creators in 2026. Estimates suggest the global creator economy will be worth more than $350 billion by 2030.

What's driving this gold rush? Creators do something that brands often struggle with at scale: make content that people genuinely want to watch.

But with this surge in investment comes a real challenge. To put it mildly, creator marketing ROI varies wildly. (To put it more bluntly: some brands have been throwing good money after bad.)

Creator marketing may be booming, but it's still a young, fast-shifting space. And without the right approach, brands risk missing the full value of the investment. So how can marketers use creators in ways that help their brands be more Meaningfully Different? We outline three key ways.

01

Use creators as cultural translators, not trend chasers

In a landscape where trends rise and vanish in the span of a morning scroll, jumping on every new trend isn't a cultural strategy. As Rachel Lowenstein, a cultural decoder and creative strategist, put it in her interview with Kantar: *'Very few brands understand their role in culture. So many of them are chasing fleeting trends, and a trend does not equal culture'.*

We know that brands that are culturally vibrant grow six times more simply by being more Meaningfully Different. However, merely 'tapping in' to moments in culture won't help you achieve that. The role your brand plays in culture must be authentic to who you are, and to what your audience wants – and this is where creators can be great partners for brands.

Creators operate directly inside culture. Because of this, they can help brands show up in the right spaces at the right moments, and in ways that feel authentic.

A good example of this is 'You Already Vote, So Vote'. This Effie Europe gold-winning campaign came from My Life My Say, a youth-led non-partisan charity in the UK. It showcases the power of marrying creators with strong cultural and strategic insights – namely, that young people already vote often (for Love Island finalists, for Celebrity Big Brother houseguests, in TikTok polls). Therefore, they should carry that habit over into participating in political elections. My Life My Say started by recruiting reality-TV personalities that young audiences had already voted for in other contexts. From there, they turned these creators into authentic translators for the cause of boosting voter turnout – turning a dry civic ask into something culturally relevant for the younger audience.

'You Already Vote, So Vote', My Life, My Say
Effie Europe 2025 Gold winner in Positive Change

02

Keep the brand in the room in the quest for authenticity

Just as with any piece of advertising, effective creator content must ultimately build positive mental connections for a brand; it must be remembered in association with the brand in question. This is precisely where creator content often falters. Kantar's cross-market analysis shows that only 27% of creator content links to brand.

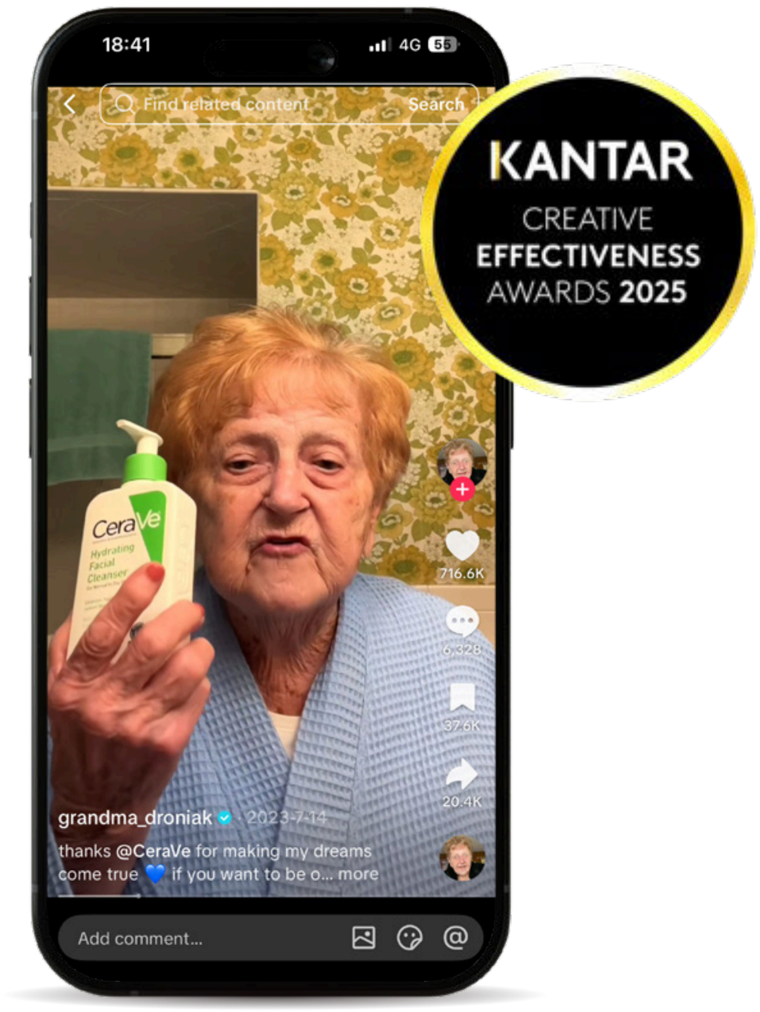
When branding is strong, however, the impact on brand equity increases by almost two-thirds.

The struggle, then, lies in honouring what makes creator content work – authenticity, entertainment, credibility – while ensuring that brand isn't an afterthought tucked in between hashtags. Success here tends to be won based on how well brands brief and collaborate with creators up front.

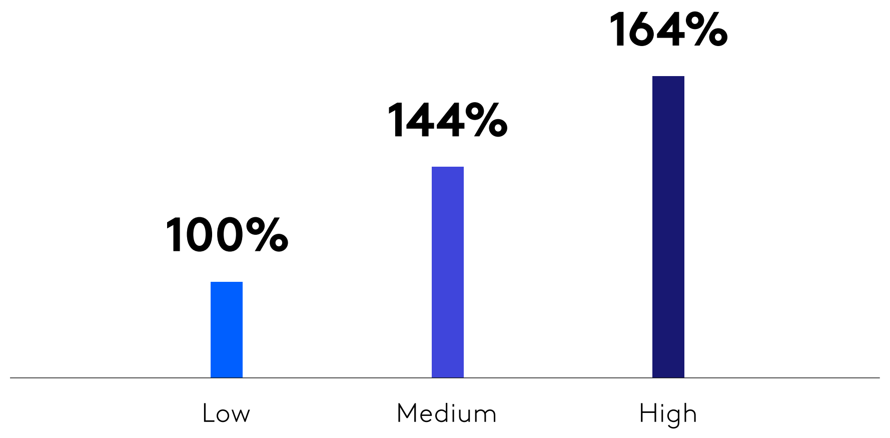
Ultimately, creators are not marketers, so guidance on effectiveness and key messages is important. But brands must also leave their partners enough creative space to express things in their own unique style.

A strong example is CeraVe's GRWM with TikTok creator Grandma Droniak. True to her blunt, no-filter 'internet grandma' persona, she gets ready for a date while naturally weaving CeraVe into her routine. Even as the content stays authentic to her style, the product remains central to the story. This ensures that the video's humorousness drives memorability for CeraVe, rather than distracting from it.

'CeraVe Grandma', CeraVe
Kantar Creative Effectiveness Awards 2025, #2 Digital & Social winner



How creator brand linkage improves equity impact



Source: Kantar Context Lab

03

Coherently plug creator content into the bigger picture

For creator content to contribute meaningfully to a campaign, it cannot live on an island. It needs to connect to the same creative direction driving the rest of the brand's activity. Synergy matters.

Kantar data shows that since 2021, brand-building impact driven by synergy effects has climbed to 45% in campaigns – a proportion that is 2.5 times higher than the 18% observed in campaigns before 2014. You have to make sure that your campaign's big idea flows coherently across channels.

Desperados' 'The Beer with Latin Vibe' campaign shows what coherent creator integration looks like in practice. The brand worked with 75 creators across music, choreography, nail art, fashion, and storytelling. It used each creator's craft to express the same cultural energy in different, channel-native ways, while always pointing back to the Desperados creative platform.

PUTTING IT TOGETHER

To win with creators, brands can't afford to place their creator strategy in a silo or treat it simply as a media buy. Instead, they need to integrate creators into the heart of their marketing strategy. That means showing up intentionally in culture; preserving strong brand identity within creator-led work; and plugging creator content into a unified campaign ecosystem.

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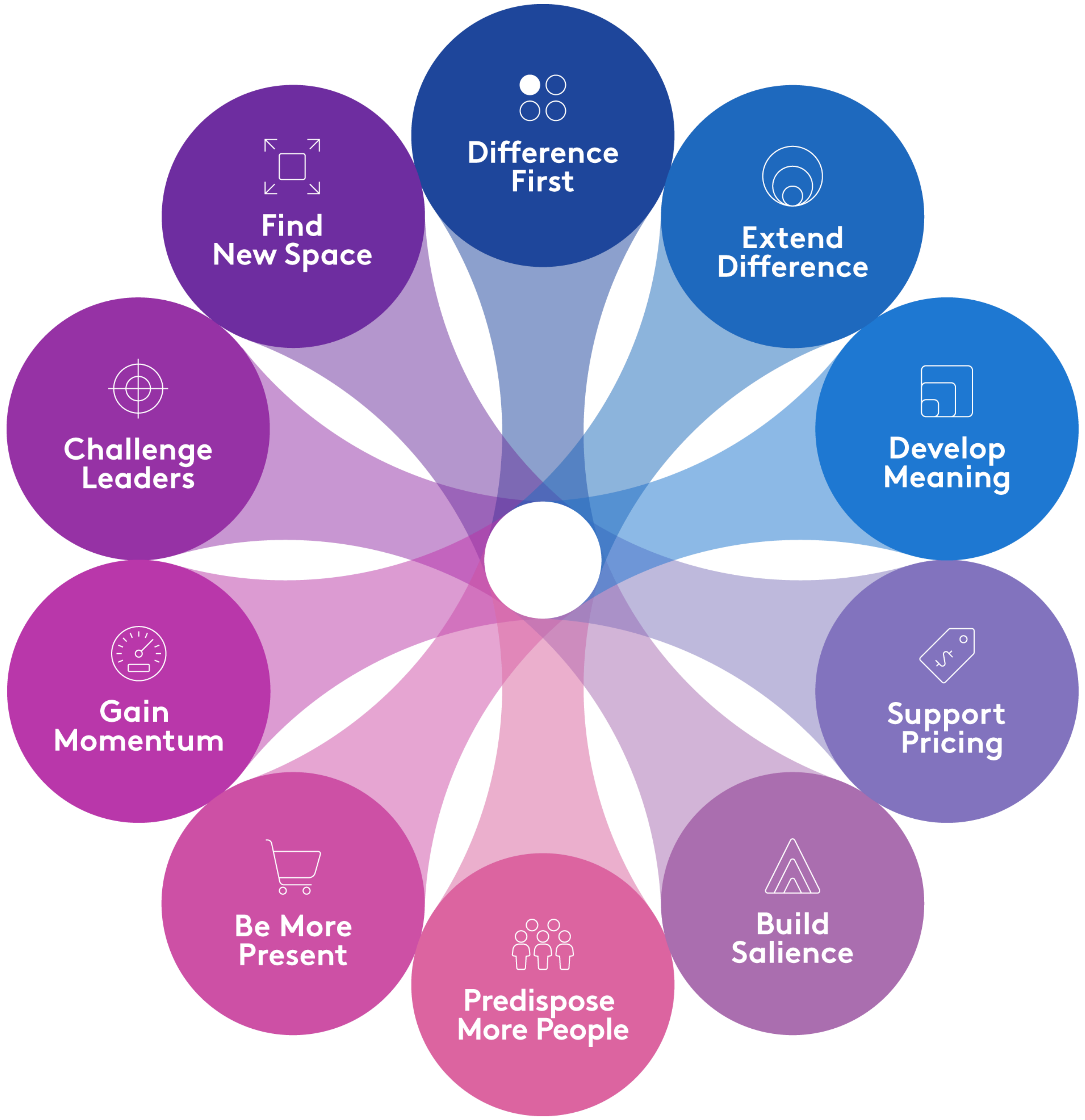
BREAKING DOWN BARRIERS
WHAT CAN THE RIGHT CHIEF MARKETING OBJECTIVE DO FOR YOU?

STRATEGIC INTELLIGENCE



While every marketing leader is tasked with driving growth, the path to achieving this varies. That's because every brand faces different barriers to expansion. Understanding the single biggest obstacle holding *your brand* back gives you the strategic intelligence to shape your marketing plans.

That's the idea behind Kantar's Chief Marketing Objectives. To bring them to life, let's look at two common growth obstacles, and the Chief Marketing Objective that would unlock growth.

OBSTACLE 1:

When your price point is not supported by consumer perception

The problem:

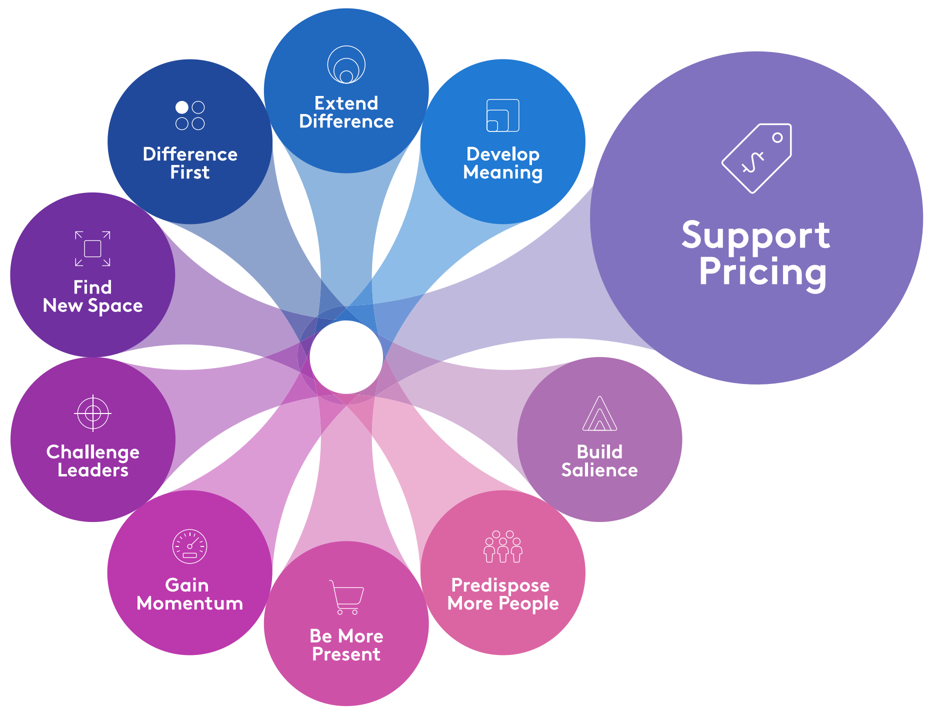
According to Kantar BrandZ analysis, nearly one in 10 brands struggle to grow because consumers do not believe the product or service justifies its price.

This is not an overnight occurrence. Often, brands in this predicament spent years relying too heavily on promotions and discounts: an all-too-common approach, but one that weakens perceived value over time.

The Chief Marketing Objective:

Your priority must be to **align price and value**. You can do this in two ways:

- Reduce margins (e.g. cut prices) without reducing quality, or
- Build perceived value by strengthening what makes your brand Meaningful and Different.



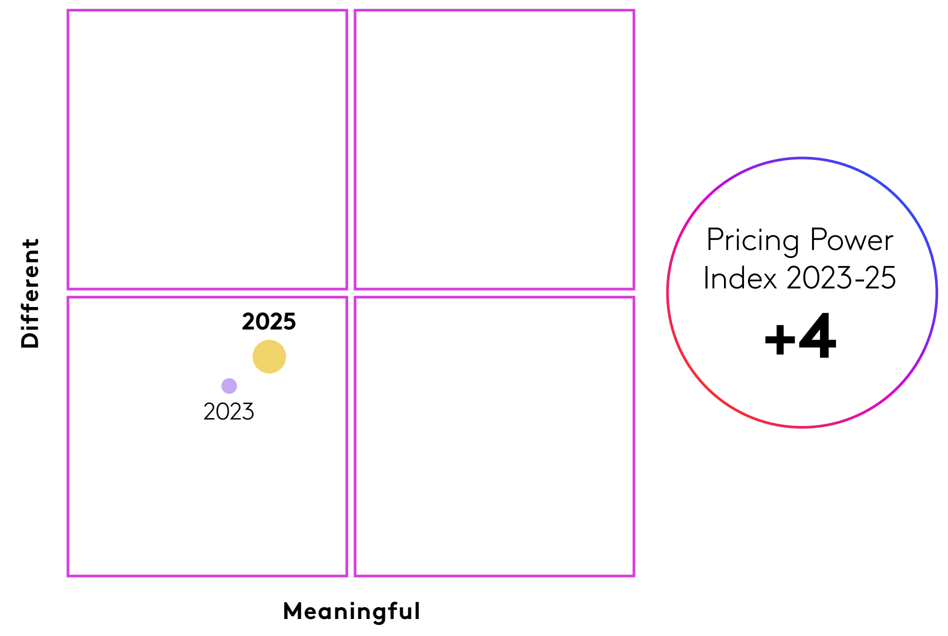
CASE STUDY

Volvic

In Belgium, water brand Volvic sat at a mid-priced point but was held back by low value perceptions. To address this, the brand invested in digital communications rooted in its volcanic heritage. These communications highlighted purity, nature, and emotional storytelling. And by reinforcing the brand's Meaningful Difference, they ultimately strengthened the value consumers saw in Volvic – thus removing a key purchase barrier.

While Volvic is still a smaller brand in Belgium, it now successfully justifies its price point. That makes Volvic so much better positioned to benefit from future category growth and brand-building activities.

Volvic has built Pricing Power through building its Meaningful Difference



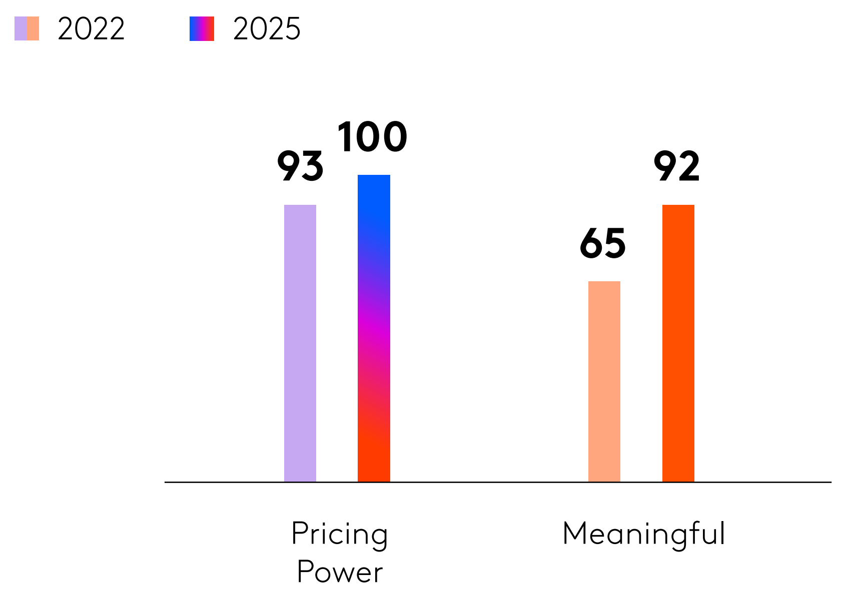
Source: Kantar BrandZ, Water, Belgium

CASE STUDY

Van Cleef & Arpels

Even heritage luxury brands can face price-worth challenges. Van Cleef & Arpels recognised that it needed to better support its price point among US consumers. To do so, the brand intensified its storytelling around craftsmanship, heritage, and its poetic Parisian universe. And it did this across multiple channels – including PR, immersive retail, and digital storytelling. Today, Van Cleef & Arpels has strengthened its Meaningful connections and successfully supported its price point. Its next Chief Marketing Objective according to Kantar BrandZ data is... to predispose more people.

Van Cleef & Arpels has built Pricing Power through strengthening its Meaningful connection



Source: Kantar BrandZ, Luxury Accessories, US

OBSTACLE 2:

When your brand has hit a steady state

The problem:

Many well-established brands hold healthy share but struggle to grow further.

The Chief Marketing Objective:

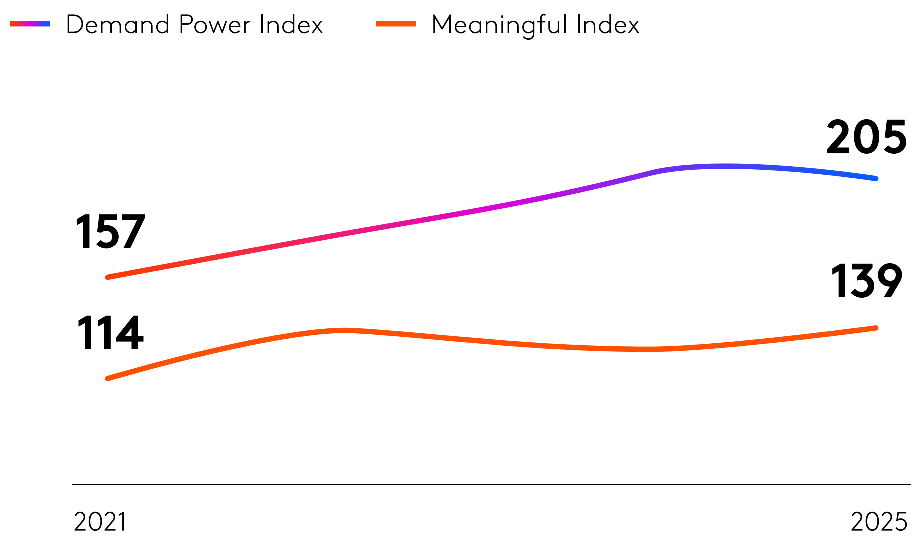
Your brand needs to **gain momentum**. Accounting for one in six brands, this is the most common Chief Marketing Objective across Kantar BrandZ's global database, and it points to a lack of Future Power or a lack of Meaningful Difference relative to its size.

If you're in this situation, your task is to revive, refresh, and expand your brand's appeal. You likely have a strong core, but your current proposition may no longer be enough to drive penetration. The rewards of regaining momentum are substantial, if hard-won. While only one in five brands succeed in this objective over a two-year period, those that do are almost twice as likely to grow penetration.

CASE STUDY

A 2021 merger with Sprint gave T-Mobile the opportunity to reinvent itself in the US. Namely, it repositioned itself as a 5G leader, moving beyond earlier perceptions of being a value-only brand. T-Mobile also refreshed its brand identity and cultural presence, including through a Super Bowl campaign with Dolly Parton and Miley Cyrus. Today, T-Mobile has strengthened its relevance: the brand feels more modern, more capable, and more attuned to consumer needs.

T-Mobile has increased Meaningful connections and gained momentum over time



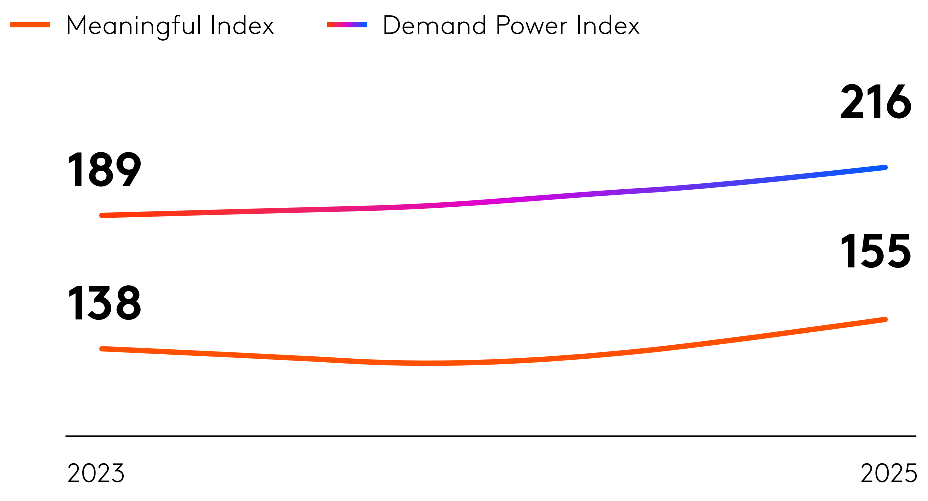
Source: Kantar BrandZ, US, Communications Providers

CASE STUDY

Under CEO Bjørn Gulden's guidance, adidas has built new momentum in the US over the past few years – and that's come through recognising the importance of brand building.

To start, the brand has reinstated its focus on the power of athletes to inspire and engage communities. From there, the brand has also capitalised on opportunities to maintain cultural relevance through music. In 2025, adidas launched 'Original Forever', a collaboration with the reuniting British rock legends Oasis. In doing so, it reignited a culturally powerful relationship with decades of shared history. This year, the adidas BadBo 1.0 sneaker received prime placement in Bad Bunny's Super Bowl halftime show; it's part of a new line created in partnership with the Latin music superstar.

adidas has gained momentum and is now ranked the #1 Sports Brand in Demand Power in the US



Source: Kantar BrandZ, US, Sports Brands

PUTTING IT TOGETHER

These examples show that growth begins with identifying your brand's Chief Marketing Objective. From there, the mandate may be to build perceived value by strengthening what makes your brand Meaningful and Different; or it may be to refresh and revive how your brand markets itself.

Revitalisation comes with its own set of hazards, of course. Evolve too far, too fast and you risk diluting what makes your brand unique. US restaurant chain Cracker Barrel's 2024 redesign is a reminder of this. Cracker Barrel tried to move with the times, but with its radical design overhaul, the brand lost the Difference that once attracted customers. Instead of rebuilding its appeal, it became blander.

So, yes: how you execute on a strategy still matters. But having the wrong priorities to start is an even more fundamental growth-killer. Positive change still starts with identifying the right strategic problem to tackle first – whether that's price-worth misalignment, flagging momentum, or one of the eight other Chief Marketing Objectives.

The first step is always diagnosis. Then, once you understand what's holding you back, make that challenge your Chief Marketing Objective – and build your brand strategy around overcoming it.

4

CATEGORY FOCUS

ALCOHOL

Category Brand Value Year-on-Year Change

-7%

Top 20 Total Brand Value
$194,099 M

APPAREL

Category Brand Value Year-on-Year Change

-5%

Top 10 Total Brand Value
$170,755 M

AUTOMOTIVE

Category Brand Value Year-on-Year Change

+14%

Top 10 Total Brand Value
$256,345 M

BUSINESS TECHNOLOGY AND SERVICES PLATFORMS

Category Brand Value Year-on-Year Change

+25%

Top 20 Total Brand Value
$4,052,773 M

CONSUMER TECHNOLOGY AND SERVICES PLATFORMS

Category Brand Value Year-on-Year Change

+16%

Top 10 Total Brand Value
$1,888,428 M

FAST FOOD

Category Brand Value Year-on-Year Change

+2%

Top 10 Total Brand Value
$415,394 M

FINANCIAL SERVICES

Category Brand Value Year-on-Year Change

+20%

Top 20 Total Brand Value
$1,209,643 M

FOOD AND BEVERAGE

Category Brand Value Year-on-Year Change

+8%

Top 20 Total Brand Value
$309,357 M

HOME CARE

Category Brand Value Year-on-Year Change

N/A

Top 10 Total Brand Value
$44,911 M

LUXURY

Category Brand Value Year-on-Year Change

-8%

Top 10 Total Brand Value
$321,194 M

MEDIA AND ENTERTAINMENT

Category Brand Value Year-on-Year Change

+40%

Top 10 Total Brand Value
$2,638,524 M

PERSONAL CARE*

Category Brand Value Year-on-Year Change

-4%

Top 20 Total Brand Value
$175,850 M

RETAIL

Category Brand Value Year-on-Year Change

+18%

Top 20 Total Brand Value
$1,099,388 M

TELECOM PROVIDERS

Category Brand Value Year-on-Year Change

+10%

Top 10 Total Brand Value
$545,637 M

*Personal Care YOY comparision is of Top 15 brands but the total is Top 20
Source: Kantar/Kantar BrandZ (including data from S&P Capital IQ and Euromonitor)

ALCOHOL

ALCOHOL TOP 20:

Brand	Brand Value (US$M)
MOUTAI	$73,630
CORONA	$16,529
BUDWEISER	$14,387
HEINEKEN	$11,829
MODELO	$7,393
WU LIANG YE	$6,797
MICHELOB ULTRA	$6,787
JOHNNIE WALKER	$6,527
BRAHMA	$6,414
HENNESSY	$5,180
BUD LIGHT	$5,065
SKOL	$4,832
NATIONAL CELLAR 1573	$4,452
GUINNESS	$4,004
STELLA ARTOIS	$3,985
VICTORIA	$3,677
TECATE	$3,390
SMIRNOFF	$3,092
JACK DANIEL'S	$3,091
XING HUA CUN	$3,041

Source: Kantar/Kantar BrandZ (including data from S&P Capital IQ and Euromonitor)

DEFINITION:
The Alcohol category includes global and regional brands, and includes brands of beer, wine, spirits and multi-category alcoholic drinks.

SUPERIOR SIPS/ TOP ALCOHOL BRANDS REPOSITION FOR PREMIUM NEW MARKETS

Category Brand Value Year-on-Year Change **-7%**

Alcohol Top 20 Total Brand Value **$194,099 M**

ALCOHOL

The Kantar BrandZ Alcohol Top 20 declines 7% as top brands face a new era.

The headline shift is the Great Moderation: declining alcohol consumption across many major markets, especially in North America and Europe. In the US, the percentage of adults who say they drink alcohol recently hit a record low of 54%. In Germany, six-month beer sales fell below 4bn litres for the first time in 2025.

No, this doesn't mean the end of brand value growth for alcohol brands. Consumers trading up to premium remains a real sales driver (the pitch is 'fewer, better drinks'). So too does the rise of 0% alcohol. But many players will be left behind.

In China, 'Moderation' also involves corporate clients moving away from lavish banquets and luxury gifting occasions. All of this has challenged the big *baijiu* houses – and some Western cognac and whisky brands, too.

In response, top alcohol brands are working to create fresh occasions and loyalties among Gen Z Chinese consumers. To do so, they're experimenting with the lighter flavours and formats favoured by this group.

In fact, 'lightness' has become a major brief for alcohol brand worldwide. Agave spirits are challenging whisky. Canned RTDs continue to grow across the globe. Above all, there's a trend toward more relaxed, casual drinking occasions.

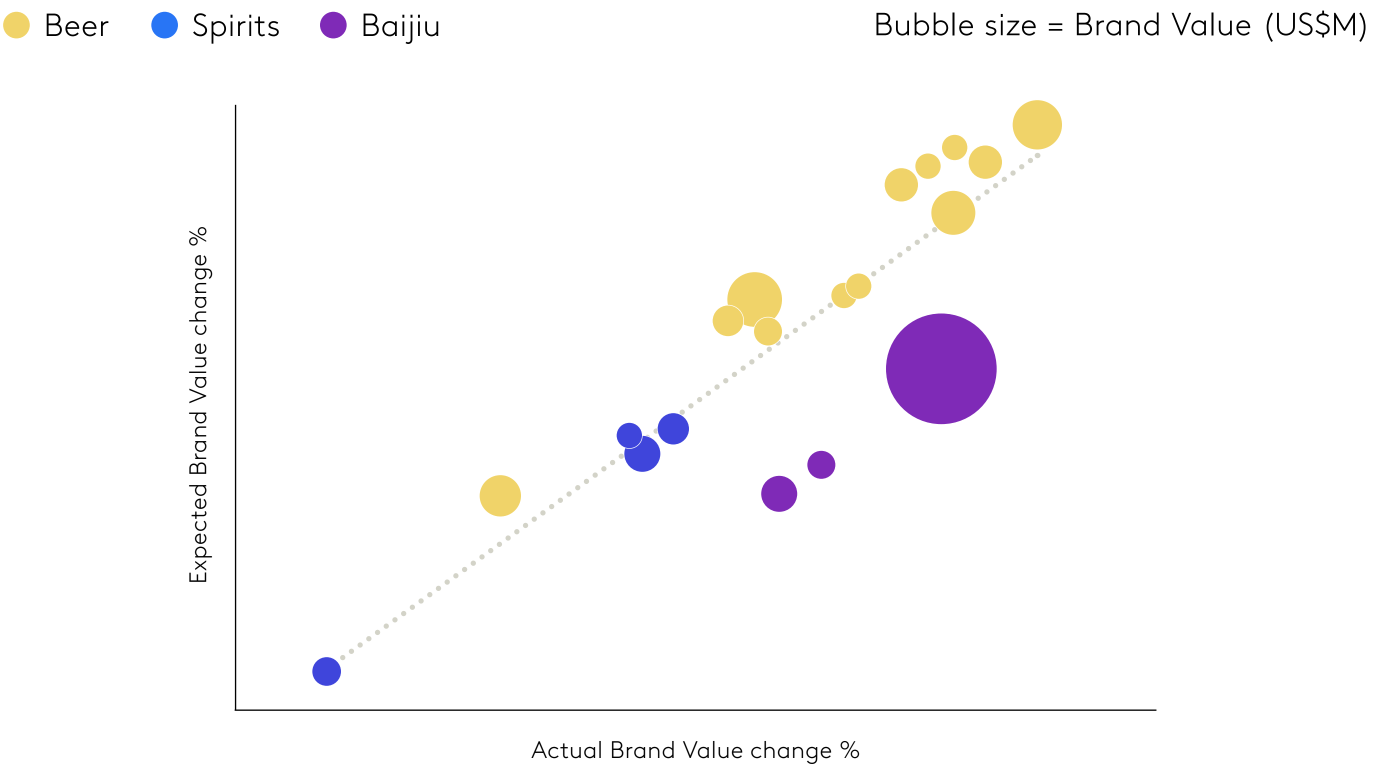
That's one big reason why top beer brands are outperforming other Alcohol brands in our Top 20. But they also deserve credit for being more present across a range of new occasions like fitness, sports, and solo relaxation – while rapidly innovating to make their non-alcoholic offers taste better.

Where else do top brands go from here? Quite literally, to India, Africa, and other markets with room to grow. India recently became the largest consumer of Scotch by volume. But at the same time, Indian consumers have also supported the rise of locally distilled whisky brands like McDowell's.

It used to be that 'mass' meant basic, while 'craft' and 'premium' plays were reserved for elites. But these days, even more democratic brands push sophistication (for example, McDowell's Double Oak Barrel blend). These growth markets are opportunity-rich – but not necessarily easy to crack.

Why? Because social media, especially, has given consumers of all backgrounds an elevated drive for discovery. As digital has become central to alcohol discovery, it's also created new challenges. Going forward, for instance, brands will need to pitch themselves online to both consumers *and* AI agents if they want to lead the pack.

Beer brands outperform category expectations
2026 vs 2025



Source: Kantar BrandZ, Top 20 Most Valuable Alcohol Brands, global data, 2026

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Taste reigns

It's widely recognised that taste is the reigning force in food and beverage – this rings true even for alcohol and beer, where perceptions around 'smooth', 'savour', and 'refresh' consistently emerge as top drivers for the category. As the cultural movement toward moderation and wellness accelerates, we see that consumers remain steadfast in their expectations around taste. Global research consistently highlights scepticism towards whether non-alcoholic beer can deliver the same flavour experience as its alcoholic counterpart. This presents a compelling challenge for beer brands: creating a non-alcoholic product that doesn't ask consumers to sacrifice taste for wellness.

Through my work with brands and clients, I've seen first-hand how the messaging behind an innovation is critical. It's not enough to perfect the product; brands must also find ways to persuasively communicate the taste parity to consumers, transforming scepticism into genuine trial and adoption. The opportunity lies in showing consumers that moderation and wellness can be a way of life without giving up what beer lovers appreciate most about the category – that irreplaceable experience of the first, delicious sip.

ALCOHOL

BRAND SPOTLIGHT

Michelob ULTRA

Michelob ULTRA has become the #1 beer brand by volume in the USA.

This is in part because its low-carb/low-cal positioning fits well with the consumer trend toward 'better for you' versions of traditional products. But why did *this* brand become the poster child for beer that's better for you? Because of a multi-year cultural campaign that's put Michelob ULTRA into conversation with countless athletes, sports, and high-profile competitions. In the same way that Corona owns 'beer for relaxation', Michelob ULTRA successfully moved its brand away from 'party' occasions and toward excellence, joy, and high achievement... at a relatively accessible price.

Michelob ULTRA has persuaded drinkers it's worth paying for

% worth *more* than it costs

Source: Kantar BrandZ, USA, Beers, 2026

BRAND TO WATCH

Ichnusa

A decade ago, Sardinian local hero brand **Ichnusa** was #13 ranked beer brand in Italy; today, it's #1 nationally on the strength of its authentic reputation. Next stop: a global launch?

Future Power Index

150

Source: Kantar BrandZ, Italy, Beers, 2024

IMPLICATIONS

01

FOCUS ON BEING MORE PRESENT

Alcohol brands can gain a lot from being more present. Look at how Michelob ULTRA has grown by associating its 'better for you' positioning with a wide range of sports moments – and how it's excelled in on-premise sales. The lesson: look for ways to extend the occasions, moments, and need states that your brand can best address, while remaining consistent with your core identity.

02

USE INNOVATION TO FIND NEW SPACE

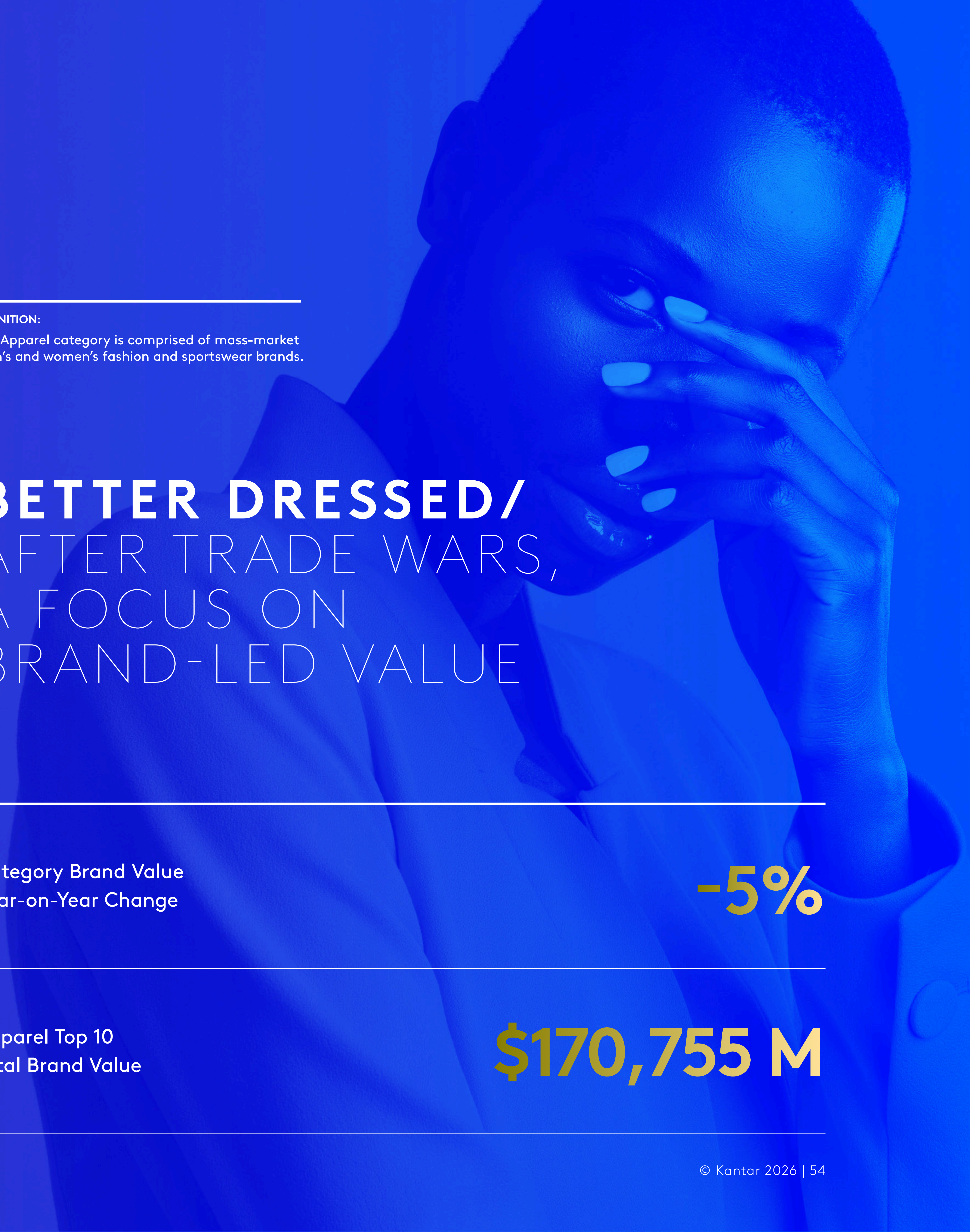
Premiumisation alone is not enough to counter the trends driving volume declines in alcohol brands' key markets. It's time to ask: which category adjacencies could be most promising? And how can these adjacent areas be shaken up through Meaningfully Different innovation?

APPAREL

APPAREL TOP 10:

Brand	Brand Value (US$M)
ZARA	$44,088
NIKE	$41,188
UNIQLO	$27,284
ADIDAS	$16,337
SHEIN	$12,339
LULULEMON	$9,079
H&M	$7,205
ASICS	$4,910
RALPH LAUREN	$4,556
ANTA	$3,768

Source: Kantar/Kantar BrandZ (including data from S&P Capital IQ and Euromonitor)



DEFINITION:
The Apparel category is comprised of mass-market men's and women's fashion and sportswear brands.

BETTER DRESSED/ AFTER TRADE WARS, A FOCUS ON BRAND-LED VALUE

Category Brand Value Year-on-Year Change **-5%**

Apparel Top 10 Total Brand Value **$170,755 M**

APPAREL

The value of the world's top Apparel brands falls by 5% this year.

An unravelling global trade consensus is partly to blame. Few goods wear their ties to global trade as clearly as apparel does: 'MADE IN CHINA', 'MADE IN PORTUGAL', 'MADE IN BANGLADESH', etc.

No one knows how the trade wars end. But one casualty is already clear: de minimis shipping exemptions. These had allowed Chinese brands like Shein and Temu to move ultra-affordable, ultra-fast fashion abroad at very low cost. Now, these players are leaning into 'brand-led' channels like Shein's new Paris flagship.

Another big story is the possible return of the middle tier. Want proof? Look at all the challenger brands that have rushed in to claim this 'missing middle' – the $150 dress, say.

Big incumbents can play in this space too, of course, and often better. They can use their supply chain connections to sell a similar dress for $75, for example; or use those same relationships to sell a $150 dress that competes credibly against 'accessible luxury' ('Credibly' being the key word here: brands have to earn the trade-up).

And indeed, this is how Zara has succeeded of late. H&M and Uniqlo are now finding similar traction upmarket. And in India, Westside has pursued a similar strategy since 1998.

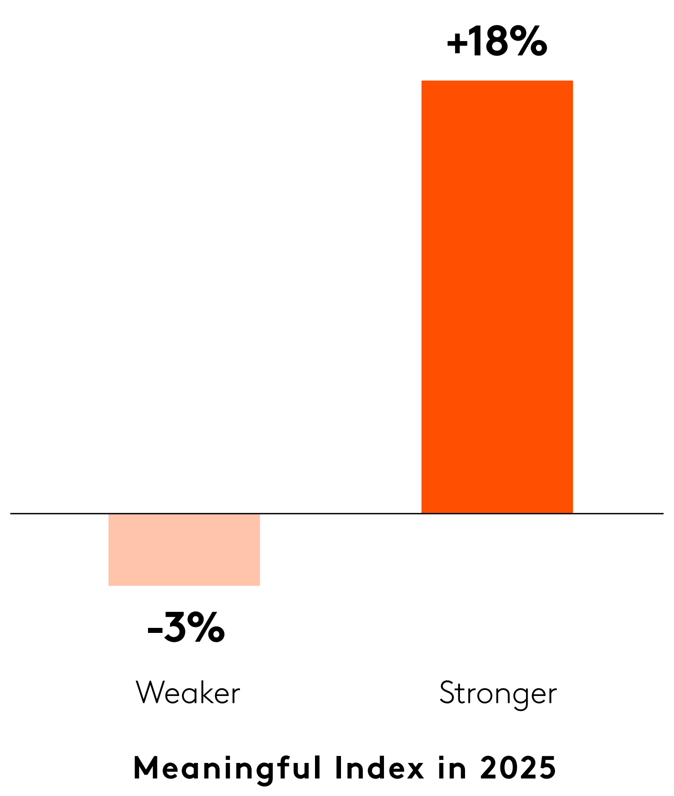
We're also seeing comeback bids from one-time giants like Abercrombie and Gap. These are well-planned revivals of heritage assets tweaked to meet modern merchandising needs – aided by viral-baiting media riffs on nostalgic styles and adverts (see the Ralph Lauren Christmas trend). That's a big lesson this year: apparel brands win when they use culture to be Meaningful.

Uniqlo is a particularly interesting case, as a weak yen, tariffs, and inflationary pressures have all but forced the one-time 'value' brand into a higher price tier. So far, it's managed this transition by leaning on quality and cultural partnerships.

And then there are the world's top athletic brands: Nike, adidas, lululemon. To keep their edge against hungry challengers both old and new (On, ALO) – as well as globalising 'national champions' like Asics – these giants must win across both innovation *and* culture.

Nike has gone back to an org chart that elevates sport (basketball, running, tennis) above segment (Men's, Women's, Children). It's once again a brand for performance-obsessed athletes. adidas, meanwhile, has begun relying more on culture-savvy local teams in key markets like the US and China.

Average Brand Value growth %
2025-2026



Source: Kantar BrandZ, Top 10 Most Valuable Apparel Brands, 2025-2026

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Alleviating consumer pressure in South African apparel

In South Africa, sustainability in apparel is judged by whether brands tangibly improve everyday life. Poverty and lack of jobs with a sufficient living wage remain among the most pressing concerns in clothing and footwear (2026 Sustainability Sector Index). While perceptions of exploitation and insufficient living wage jobs have improved since 2025, the category remains under sustained scrutiny.

This reflects a distinctly local lens. Sustainability is understood through Ubuntu – community over individual. Social and environmental issues are inseparable. And above all, affordability is non-negotiable. When sustainability feels expensive, it fails.

Apparel brands changing perceptions are those redesigning systems around people, rather than asking people to make harder choices.

Pepkor exemplifies this shift. Its sustainability strategy begins with a clear acknowledgement that most South Africans cannot pay a premium for 'doing good'. Instead, Pepkor frames sustainability as affordability with dignity – embedding durability and responsible sourcing and supplier standards into everyday essentials. Here, environmental responsibility is not a separate ambition but a way to protect access, jobs, and value at scale.

For apparel brands in South Africa, sustainability earns trust when it reduces pressure on people's lives, not when it raises expectations of them.

APPAREL

BRAND SPOTLIGHT

RALPH LAUREN

2026 BRAND VALUE

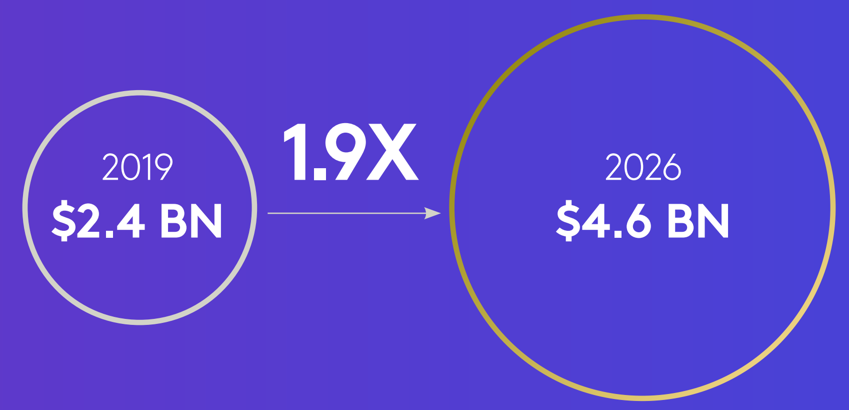
$4,556 M

Re-entry

A heritage resurgence

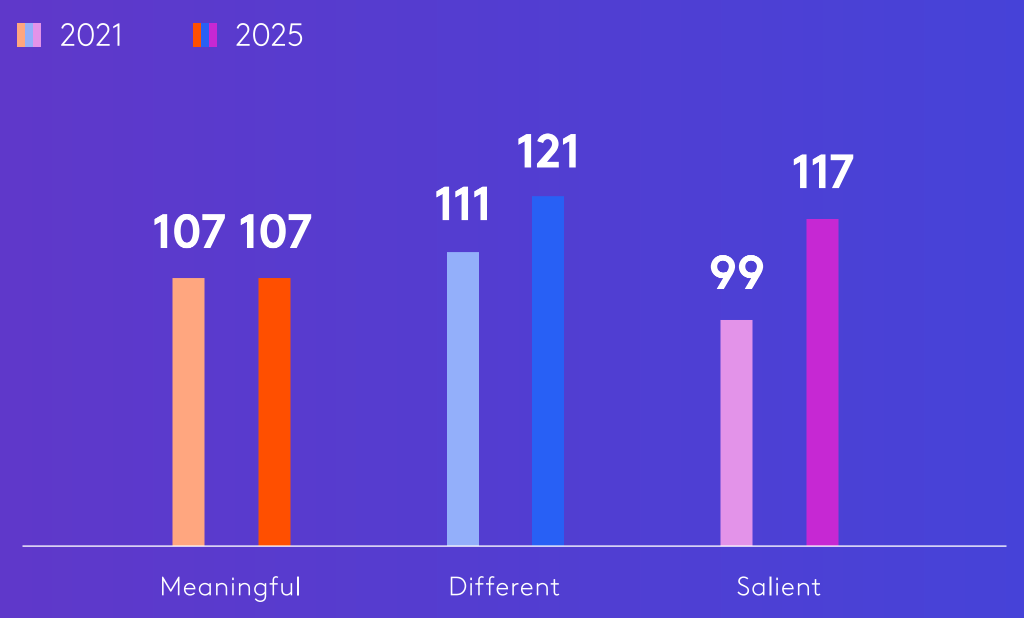
Founded in 1967, Ralph Lauren built its success around a distinctly American vision of luxury lifestyle. Today, the brand's polo shirts and quarter zips have gained renewed status as 'house icons' of quiet luxury. That's thanks in part to enthusiastic, affectionate meme-ing by younger generations on social media (See *'Ralph Lauren Christmas'* and *'It's straight quarter-zips and matcha now...'*). Look behind this viral success, and you'll find a long-term, concerted effort to reinvigorate Ralph Lauren's core brand offerings online, in-store, and through the brand's many experiential beachheads like Ralph's Coffee. Culture has also played a big role, from sports activations to a featured role in Taylor Swift's engagement photos.

Brand Value



Brand equity

Under 35s – US



Source: Kantar BrandZ, US, Luxury Apparel, 2021–2025

BRAND TO WATCH

MERCARI

Founded in 2013, **Mercari** is Japan's leading peer-to-peer resale platform. It's made second-hand selling fast, mobile first, and socially accepted, especially among younger consumers at home and increasingly abroad.

Future Power Index

146

Source: Kantar BrandZ, Japan, Fashion Resellers, 2024

IMPLICATIONS

01

WIN THROUGH DAILY LIFE AND CULTURE

Quality, design, and performance all help apparel brands work better for people. But lasting growth comes when brands embed Meaningful, emotional associations into everyday wear. Apparel moves beyond utility when it attaches itself to identity, belonging, and cultural life. These associations make brands memorable and habitually easier to choose – while also supporting their Pricing Power.

02

SUCCESS DEPENDS ON EARNING THE TRADE-UP

Premiumisation offers apparel brands a route to value growth, but the rights to it must be earnt. Stronger materials, fit, performance, and design innovation must be paired with elevated brand experiences that clearly justify higher prices.

AUTOMOTIVE

AUTOMOTIVE TOP 10:

Brand	Brand Value (US$M)
TESLA	$112,097
TOYOTA	$31,772
BMW	$21,810
MERCEDES-BENZ	$20,656
BYD	$20,362
FERRARI	$12,119
FORD	$11,614
MARUTI SUZUKI	$9,905
PORSCHE	$8,033
HONDA	$7,978

Source: Kantar/Kantar BrandZ (including data from S&P Capital IQ and Euromonitor)

DEFINITION:
The Automotive category includes mass-market and luxury cars, trucks, motorcycles, scooters, and tyres. Each brand includes all models marketed under the brand name.

PICKING UP SPEED/ TOP AUTO BRANDS RUN AHEAD OF THE TRENDS

Category Brand Value Year-on-Year Change **+14%**

Automotive Top 10 Total Brand Value **$256,345 M**

AUTOMOTIVE

The Automotive category grows 14% this year.

Electric vehicle sales surged in key markets like the US and China as consumers rushed to get ahead of expiring tax credits. Tariff uncertainty produced similar effects, pushing buyers to lock in lower prices in advance of threatened hikes.

These are major market drivers, though they are not necessarily repeatable – nor controllable by brands themselves. What automakers *can* own is how attuned they are to changing consumer values. And there's been new success in this regard.

One such shift is the evolution of cars from 'driving machines' to 'mobility hubs'. A sizeable consumer base now sees autos as lifestyle environments first and foremost – and then as high-performance roadsters only secondarily, if at all.

Future Power predicts growth in Automotive Top 10
Brand Value growth 2025-2026

+3%
Weaker Future Power

+14%
Stronger Future Power

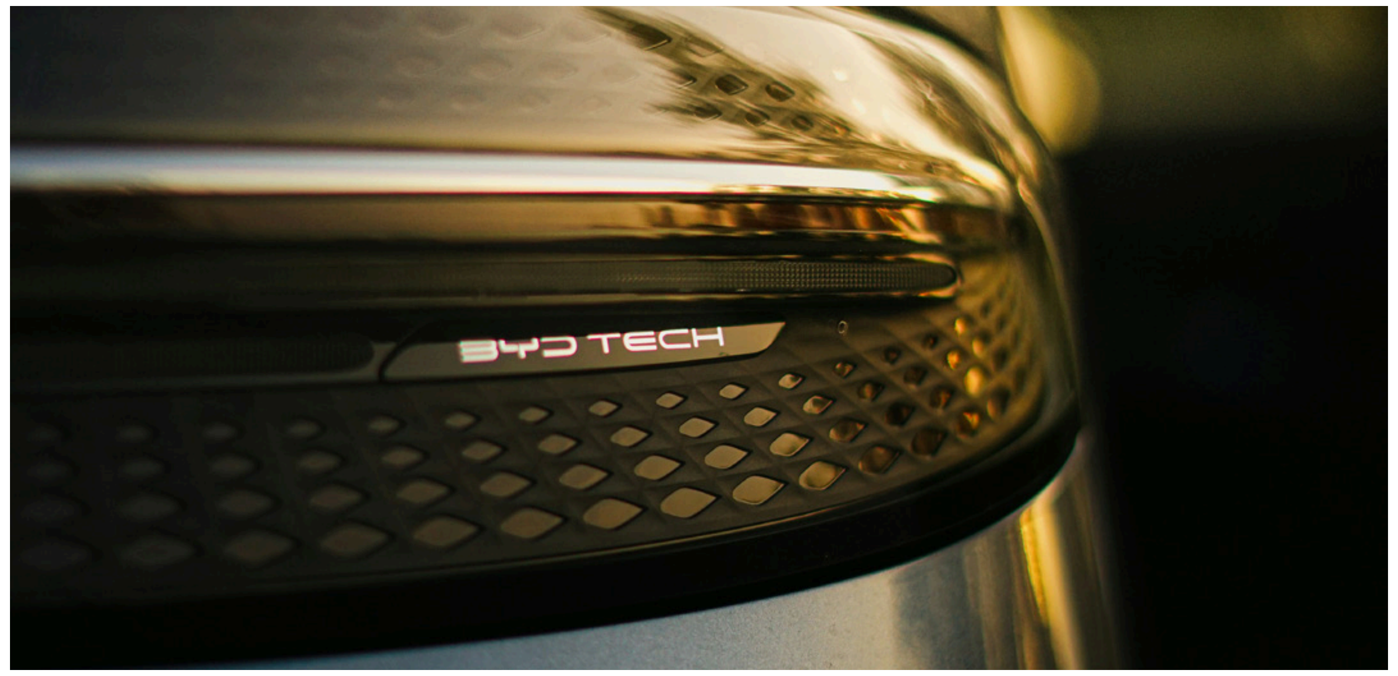
Source: Kantar BrandZ, Global Top 10 Automotive Brands

As such, many would-be buyers now expect predictive maintenance, intuitive interfaces, and seamless connectivity as table stakes. And they're looking forward to the day when agentive AI butlers and autonomous-driving features become standard.

At the same time though, most buyers still prefer in-person purchase journeys. And that's interesting, because it suggests that for top auto brands, greater digitalisation *and* humanisation should ideally advance in tandem.

This is why, and how, lifestyle amenities have become such crucial differentiators. There are still plenty of 'carheads' in the world who thrill to record-breaking performance specs. But often, buyers care more about advanced in-cabin amenities such as food and drink coolers, entertainment consoles, and signature fragrances. Chinese consumers have been at the forefront of this sea change – a shift which some western marques overlooked in their products and marketing overseas. They must now revamp their China strategies to regain lost Meaning.

Meanwhile, at the top end of the market, another clear trend is personalisation. Wealthy buyers in booming regions like the Middle East are willing to spend big for vehicles tailored to their exact tastes and specifications. Ferrari recognised this earliest. Now other European luxury brands have followed suit with their own takes on high-touch, one-to-one, 'D2C' craftsmanship.



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The new battleground for automotive growth

Customers perceive today's automotive market as innovative but structurally unsettled. They are exposed to a rapid cadence of model launches, accelerating electrification agendas and increasingly complex technology choices. Through all this, prices remain elevated and long-term outcomes – regulation, infrastructure, residual values – remain uncertain.

Electric vehicles are widely accepted as the final destination, yet demand has recalibrated rather than declined. For many customers, EVs bundle too many unresolved variables at once: battery evolution, charging experience, depreciation risk, and fast-moving competitive benchmarks.

In this environment, hybrids have emerged as a psychologically coherent bridge. They allow customers to express progress and environmental intent without committing prematurely to a single technological future. To select combinations that preserve desire while remaining credible in a volatile market. Traditional OEMs talk boldly about innovation while delivering it incrementally and cautiously. Chinese brands, by contrast and even in markets where their penetration is low, redefine brand by shifting trust from heritage and narrative to visible product experience, digital sophistication, and value density. Customers are not choosing between brand or product as they used to; they are selecting combinations that preserve desire while remaining credible in a volatile market.

AUTOMOTIVE

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Beyond the showroom – the emergence of vehicles that feel alive

The automotive industry is shifting from hardware-focused manufacturing to Software Defined Vehicles (SDVs), making car upgrades through over-the-air updates. This change transforms the whole business model into an ongoing brand-customer relationship, with OEM's remotely fixing services, offering features on demand, and using real-time data for maintenance.

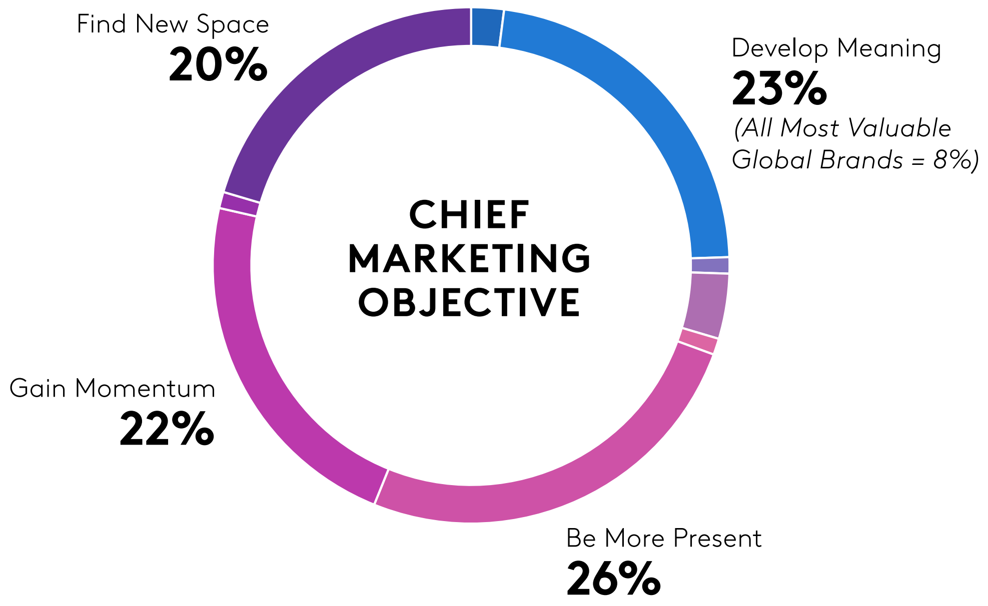
Separating software from hardware lets vehicles stay technologically relevant & Meaningfully Different for longer, boosting both lifecycle and sustainability.

Tesla leads by monetising software upgrades well after sale, while Chinese brands have taken this up a notch, using SDV architecture and AI to deliver adaptable tech even in its budget models. Legacy automakers such as Mercedes-Benz and BMW are adopting centralised tech structure to keep their cars up to date. As the industry enters an 'AI war', the competitive battlefield has moved from the engine bay to the operating system. Going forward, the automotive revolution will be defined by one simple metric: a car that doesn't update is a car that's stuck in the past.

The CES 2026 event recently reinforced the industry's shift toward SDVs, a key focus of automotive OEMs today.

This evolution will ultimately offer manufacturers a 'tech multiple' in stock market valuations, shifting the perception of automotive brands from legacy manufacturers to high-growth tech entities.

% of Automotive Top 10 within each Objective



Source: Kantar BrandZ, Global Top 10 Automotive Brands; Most Valuable Global Brands 2026

At the other end of the pricing spectrum, Chinese marques have become tech-forward, high-volume disruptors in the budget auto segment. This certainly true in China's domestic market where, if anything, price competition remains *too* intense. But it's also plenty evident abroad. Low-cost Chinese EV models attract the most media attention. But don't overlook more traditional players like Chery, which leads China's vehicle exports with affordable combustion models.

Price alone cannot explain these brands' success abroad; positioning matters, too. Innovative new factories have allowed Chinese marques to localise for overseas markets without sacrificing efficiency. One striking example here is BYD's Racco minicar, specifically designed and tailored to compete in a single market – Japan. Could this approach become the new gold standard for export cars?

It's a question that the big US brands must confront as they defend their share in diverse regions like Europe (for Ford) and South America (for General Motors). At home, these brands still have some breathing room thanks to tariffs and other rules that have thus far barred the Chinese marques. But abroad, they'll have to fight.

Many US executives also now lament that their industry moved too quickly toward full electrification, at the expense of more transitional models. Toyota embodies the alternate path here. By leaning into plug-in hybrids, Toyota successfully met consumers 'where they are'. Looking ahead, Toyota has a similarly differentiated approach to next-gen energy sources, investing in both solid-state batteries *and* hydrogen power.

And then there's Tesla, which remains the category's clear number one. The Texas-headquartered brand has recently grown more controversial in its home market (though the Americans who do like Tesla still *really like Tesla*). Abroad, the brand's reputation has proved more resilient. That includes in China, where Tesla is still unusually competitive for a foreign EV player – as well as in newly entered markets like India, where the brand carries considerable cachet as a heretofore unavailable luxury marque (and also, it must be said, as a synecdoche for CEO Elon Musk).

What Tesla and the Chinese brands share is a gift for stoking momentum, or Future Power. Their executives use social media in more exciting, emotional ways than their competitor. What's more, greater digital fluency tends to go hand in hand with better signal intelligence. The more executives are plugged in to online consumer sentiment, the better they'll be able to respond to any momentum dips *before* they impact sales.

Across regions, BrandZ data shows automotive brands tend to have built Difference perceptions but have a clear opportunity to build stronger Meaningful connections. This means keeping up with evolving needs and building cultural relevance.

AUTOMOTIVE

BRAND SPOTLIGHT

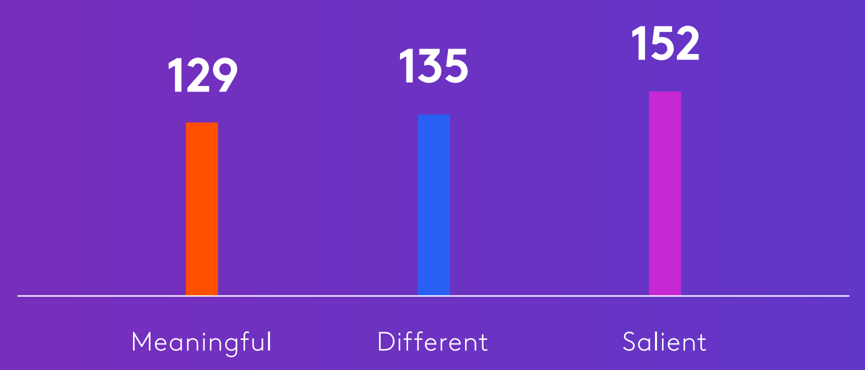
BYD

2026 BRAND VALUE

$20,362 M

+41% vs 2025

Global brand equity



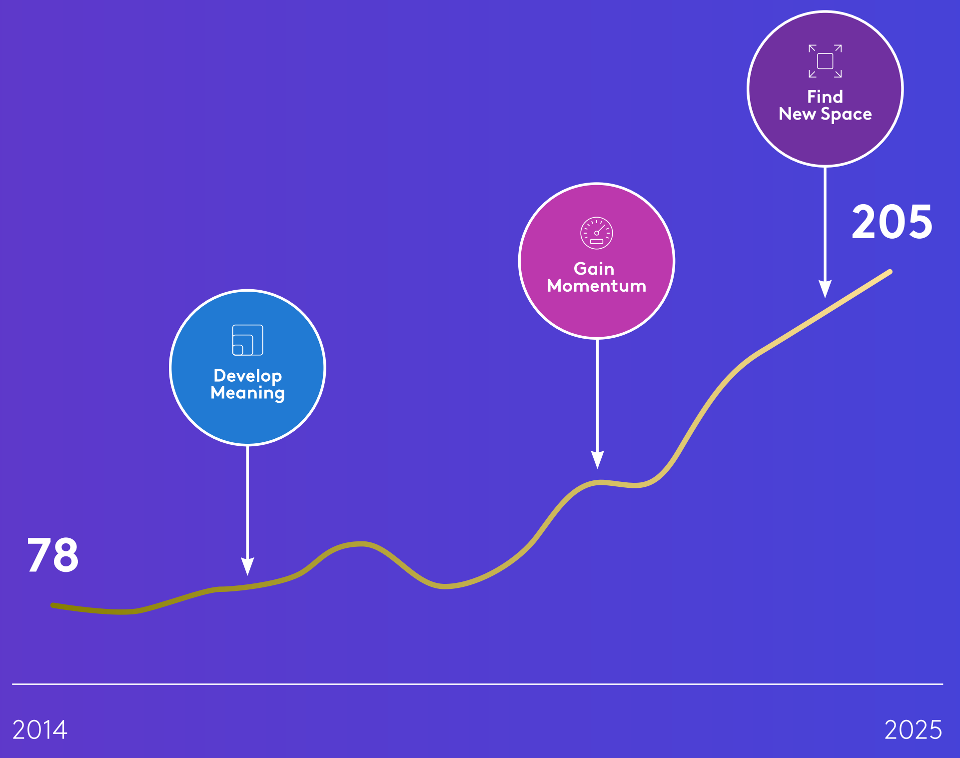
Source: Kantar BrandZ, Most Valuable Global Brands, global data, 2026

Average Future Power across 9 overseas markets

Future Power Index

112

Demand Power – China



Source: Kantar BrandZ, Chinese Mainland, Cars, 2014-2025

Addressing its Chief Marketing Objectives

BYD has elevated consumer perceptions in China through its leadership in new energy vehicles, offering strong technology innovation at affordable prices.

Now, after building strong relevance and Salience in its home market, BYD is working to find new space overseas. It seems to have a winning formula: with exports surpassing 900,000 vehicles in 2025 and expansion across 110+ countries, BYD is rapidly accelerating its global presence. The hope is that its momentum gains abroad will translate into the same kind of Demand Power boost that the brand has seen in China.

BRAND SPOTLIGHT

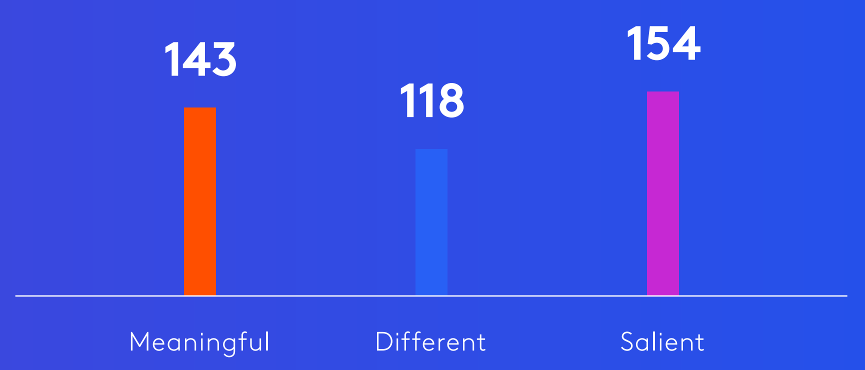
Toyota

2026 BRAND VALUE

$31,772 M

+8% vs 2025

Global brand equity



Toyota, US Cars

Meaningful **153**

Trust **117**

Sharing **118**

How Toyota has built Meaning

Toyota's Meaningful connections are built on trust and social currency. Toyota is the most Meaningful Automotive brand in the US, its biggest market. It is known by customers for its strong product range, purposeful messaging around safety, and reliable expertise. Toyota has also benefitted from its status as a day-one leader and champion of hybrid vehicle formats. All of these attributes have built durable social currency for Toyota, and have laddered up to a deep sense of trust.

At the same time, Toyota has strengthened its cultural relevance by positioning itself at the intersection of community impact and youth development. Its partnership with the NFL FLAG youth football league engages local communities across the US, while also generating wider visibility and buzz through NFL broadcast moments that highlight the programme.

Brand Strengths:

GOOD RANGE

MAKES LIVES BETTER

BEST AT WHAT THEY DO

Source: Kantar BrandZ, USA, Cars, 2025

AUTOMOTIVE

BRANDS TO WATCH

Despite only beginning EV production in 2024, consumer tech giant **Xiaomi** has emerged as a major automotive contender. In addition to its pre-existing advantages in vertical integration, hardware R&D, and supply chain scale, Xiaomi's foray into cars has benefitted from the profile of its popular CEO, Lei Jun, who is a major social media star and live streamer in China.

Future Power Index
129

Source: Kantar BrandZ, China, Cars, 2025

CUPRA

Spanish brand **CUPRA** is building strong momentum in Germany, which is its biggest market (and the home of its parent company Volkswagen). CUPRA's focus on providing a more high-performance EV driving experience helps it to stand out from the pack, while its model mix aligns smartly with local preferences. It's perceived to be a brand with strong design and a distinctive identity.

Future Power Index
124

Source: Kantar BrandZ, Germany, Cars, 2025

IMPLICATIONS

01

FIND THE RIGHT SIGNAL INTELLIGENCE

In a fast-moving sector such as automotive, shifts in brand momentum can clue you into future sales trends – while also indicating where marketing has the best chance at spurring growth. Prioritise marketing investments that deepen consumer connections (rather than simply extending reach).

02

STRENGTHEN YOUR ROLE IN PEOPLE'S LIVES

Meaningful associations drive demand and support higher pricing. Today, automotive brands score well on Difference (often through advanced tech capabilities) but lag behind in meeting people's needs. This gap limits growth. The remedy? Invest in deeper emotional connections to build trust and cultural relevance.

BUSINESS TECHNOLOGY AND SERVICES PLATFORMS

BUSINESS TECHNOLOGY AND SERVICES PLATFORMS TOP 20:

Brand	Brand Value (US$M)
MICROSOFT	$1,111,788
NVIDIA	$814,906
AMAZON WEB SERVICES	$591,372
ORACLE	$235,838
GOOGLE CLOUD	$184,156
IBM	$150,760
SAP	$98,183
CLAUDE	$96,577
AMD	$91,089
CISCO	$90,483
VMWARE	$84,311
INTEL	$69,108
SIEMENS*	$61,126
SALESFORCE	$56,110
INTUIT	$55,516
ADP	$55,505
TEXAS INSTRUMENTS	$54,924
SNAPDRAGON	$51,053
ADOBE	$50,511
SERVICENOW	$49,457

*Technology Conglomerate
Source: Kantar/Kantar BrandZ (including data from S&P Capital IQ)

DEFINITION:
The Business Technology and Services Platforms category includes brands that provide (i) IT systems and software infrastructure, including software, middleware, and cloud computing, components for manufacturing of smart/IoT devices (ii) Software and applications for design, publishing, and digital media; and business processes like accounting, finance, productivity, sales, teamworking or messaging (iii) IT consulting/outsourcing for business.

NEXT-LEVEL GROWTH/ THE RACE TO BRAND AI HEATS UP

Category Brand Value Year-on-Year Change **+25%**

Business Technology and Services Platforms Top 20 Total Brand Value **$4,052,773 M**

BUSINESS TECHNOLOGY AND SERVICES PLATFORMS

The category grew 25% this year. Results were strong, if uneven. Advanced AI tools cut demand for some legacy software products while boosting names like Microsoft, NVIDIA, and category newcomer Claude.

Top players in B2B have long been willing to upend the category's status quo to unlock growth. AI is no exception, and the gains so far have been staggering.

Some estimates say as much as half of US GDP growth last year came from AI. This includes breakneck investments in new data centres and microchips, as well as wealth effects from Americans fortunate enough (for now) to own stock in AI companies.

Still, success for top AI brands has come with reputational risks – not to mention tougher regulations at home and abroad. To manage these brands will need country-by-country playbooks to safeguard trust.

India, for example, has an exceptionally AI-friendly consumer base. (So much so that OpenAI's ChatGPT introduced special plans and price tiers there.) But, employment anxiety runs high among the Indian middle class, leading to fears that AI will decimate entry-level job prospects for the country's top graduates. That makes *B2B* AI marketing in India more fraught.

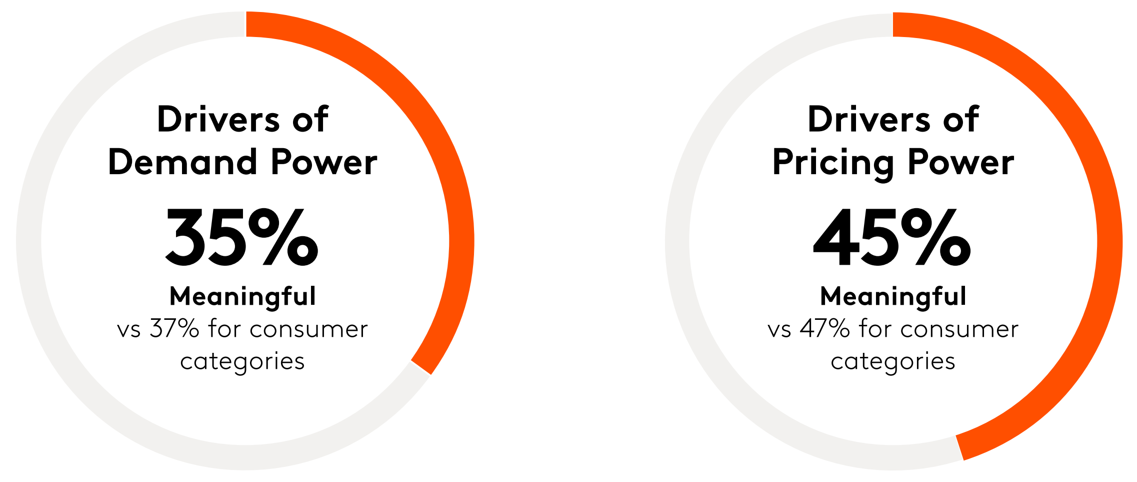
Brands operating in China must navigate similar anxieties around employment, while *also* manoeuvring around this decade's volatile great-power tensions.

All of this calls for smarter marketing. Performance metrics alone will not determine which AI chatbots and agents win the day. Human preferences may well prove to be the determining factor, based on dimensions like values, personality, ease – and especially trust.

Accordingly, we are now seeing the first attempts at more deliberate AI monitoring of brand building and brand equity. The best AI platform ads go beyond now-standard concepts like 'making a cinematically photoreal ad in-engine'. For example, a recent spot for the AI Assistant in Adobe Express assumes the point of view of a designer generating animated social media assets for a beverage brand. Why is this smart? Because it empathetically centres a real-world use case.

More generally, brand building is about defining yourself and others before they define *you*. Not all brands will opt for the confrontational tone struck by some high-profile CEOs. But they'll need to show real personality going forward, with the aim of building Meaningful Difference. Whilst the pursuit of Difference is paramount. Being Meaningful also matters as just as much for B2B brands as B2C. Legacy brands such as Microsoft, IBM, and Intel already excel at this. Can the startups?

Being Meaningful matters just as much for B2B brands
All business categories



Source: Kantar BrandZ, Business all categories, 2023-25 (74 categories)

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Invisible inputs, visible power

The global technology landscape in 2026 is being reshaped by an unprecedented convergence of geopolitical tension, AI acceleration, and supply chain fragility – nowhere is this more visible than in semiconductors and rare earth materials. Control over these input materials has become a decisive strategic differentiator for technology companies, with early signs already visible in how geopolitical forces are influencing manufacturing and sourcing decisions.

The surge in AI adoption has amplified semiconductor demand across categories – from cloud and edge computing to mobility and industrial automation. Selected manufacturing clusters have reported record semiconductor exports, reflecting both heightened global dependency and the economic sensitivity of chip supply. This shift places immense pressure on brands such as Nvidia, Samsung, and TSMC to build resilient, geographically diversified supply chains while continuing to drive innovative technology and business leadership. In this context, semiconductor brands must invest in strong, differentiated equity to navigate an increasingly competitive and highly regulated space.

For corporates and brands beyond the tech sector, this environment elevates semiconductors and rare earths from background enablers to boardroom-level priorities. Their availability now directly influences product roadmaps, Pricing Power, and the ability to deliver Meaningful, differentiated experiences.

BUSINESS TECHNOLOGY AND SERVICES PLATFORMS

BRAND SPOTLIGHT

IBM

2026 BRAND VALUE

$150,760 M

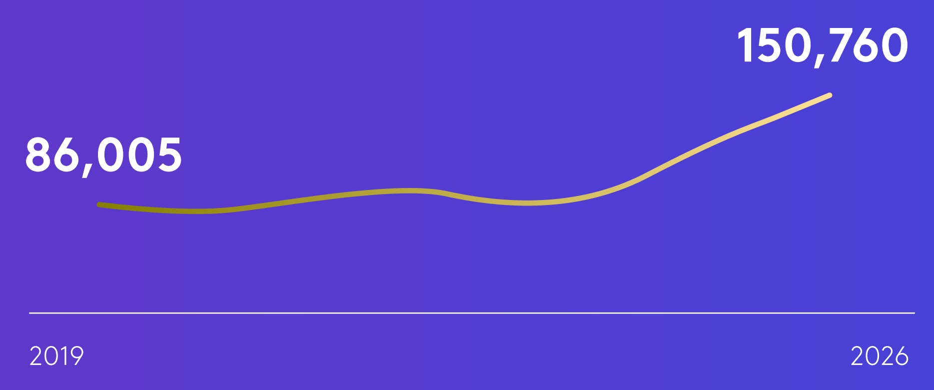
+20% vs 2025

IBM was founded in 1911, making it one of the oldest Business Technology brands in the ranking.

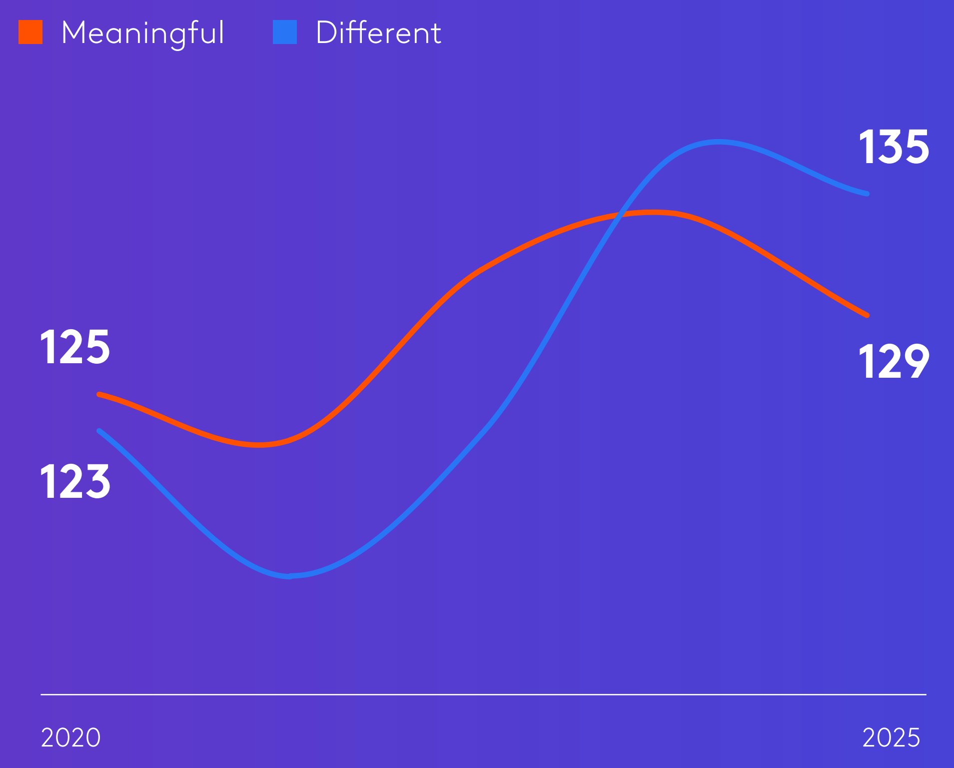
It is highly trusted. IBM's long-standing relationships with many of its biggest enterprise customers has earned it the right to handle the hardest, riskiest problems in business. Its blue-chip consulting practice reinforces its technology business in this respect. IBM's path to AI-driven brand value growth runs directly through this 'trusted' brand identity: its watsonx platform helps businesses use AI in a safe, practical way by keeping control in the customer's hands. By fitting into existing systems and cloud setups, watsonx delivers real business value without adding risk or complexity.

All this means that in recent years IBM's Meaningful Difference among its business audience has gone from strength to strength helping to secure volume and margin.

Brand Value (US$M)



US brand equity growth



Source: Kantar BrandZ, US, Business IT Systems and Cloud Computing; Business IT Consulting and Outsourcing, 2020–25

BRAND TO WATCH

Coforge

Coforge made its debut in Kantar BrandZ's Most Valuable Indian Brands ranking in 2025 at #64. The brand is growing faster than its peers by focusing on AI solutions for complex sectors like financial services, insurance, and travel.

Future Power Index

123

Source: Kantar BrandZ, US, Business IT Consulting and Outsourcing, 2025

IMPLICATIONS

01

EMBRACE BEING MEANINGFUL

Meaningful connections help business brands as much they help consumer-facing brands. B2B marketers' are thus long overdue for a shift from reach-led activity to relationship-led engagement. Clients expect empathy and value at every touchpoint. This means better understanding clients' needs, pain points, and buying contexts – and then using content, channels, and experiences to support clients' decision making.

02

TRUST IS AS IMPORTANT AS EVER

In a period of rapid technological change and rising scepticism, trust remains essential for driving demand. B2B marketers need to show credibility through transparency, proof of expertise, and consistent delivery. Clear communication around data use, AI, and security is essential. Once it's lost, trust is very hard to rebuild. That makes it a strategic asset, not a soft metric.

CONSUMER TECHNOLOGY AND SERVICES PLATFORMS

CONSUMER TECHNOLOGY AND SERVICES PLATFORMS TOP 10:

	Brand Value (US$M)
APPLE	$1,380,294
CHATGPT	$167,765
HUAWEI	$68,156
UBER	$58,186
SAMSUNG	$48,736
XBOX	$43,972
BOOKING.COM	$33,389
XIAOMI	$32,502
SONY	$28,897
DOORDASH	$26,533

Source: Kantar/Kantar BrandZ (including data from S&P Capital IQ)

DEFINITION:
The Consumer Technology and Services Platforms category includes manufacturers of consumer electronics products, including TVs, home audio equipment, game consoles, digital cameras, phones, personal computers, laptops, printers, keyboards, etc., as well as other electronic products used at home. It also includes online platforms which provides service to consumers.

CHARGING UP/ TOP TECH BRANDS PLAN AHEAD

Category Brand Value Year-on-Year Change **+16%**

Consumer Technology and Services Platforms Top 10 Total Brand Value **$1,888,428 M**

CONSUMER TECHNOLOGY AND SERVICES PLATFORMS

The Consumer Technology and Services Platforms category grows 16% in a transitional year.

Transitional but positive, starting with category leader Apple. The iPhone 17 series has been a hit worldwide, even in China where sales had been flagging. In the two months after its launch, the series accounted for 9% of global smartphone sales, according to Worldpanel by Numerator.

That makes it a great swan song for outgoing Apple CEO Tim Cook. A few years ago, Apple decided to make numbered models its 'affordable' standard-bearers while reserving the highest premium tier for Pro. It took a while to perfect the balance of features between these tiers. Now Apple reaps the rewards of a more Meaningful, balanced portfolio.

Samsung has pursued a similar ladder, while also adding an Ultra tier and a foldables offshoot. Overall, its premium stance remains resilient.

Huawei, meanwhile, has staged a full comeback in China, and now sets its sights on renewed expansion abroad. Overall, Chinese brands are competing credibly against the category leaders in developing markets like India and Southeast Asia.

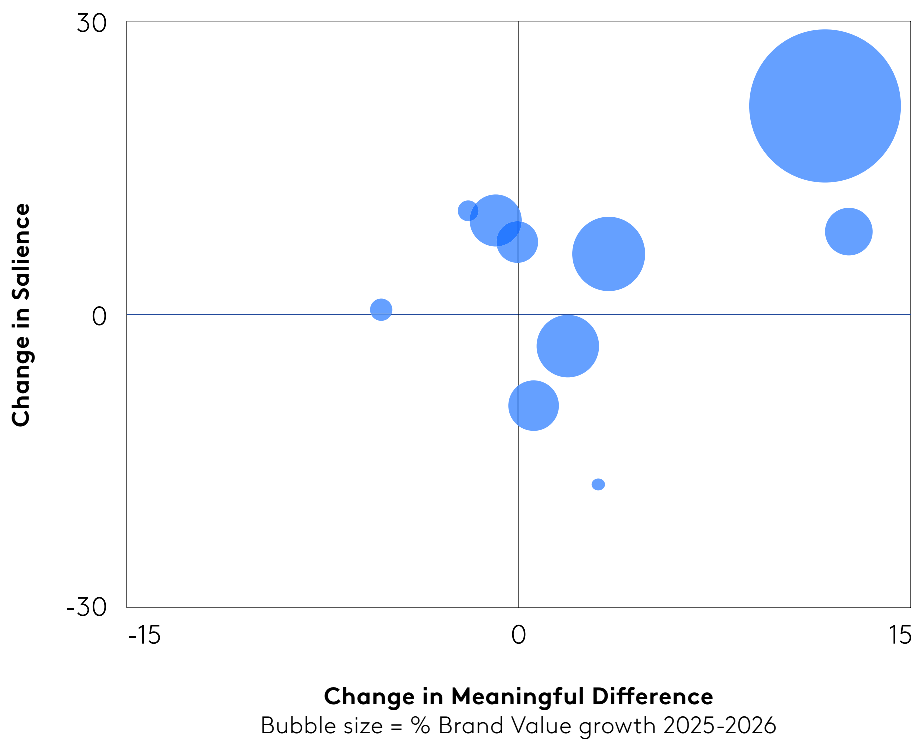
And yet hardware supremacy is not the only battle worth waging. The latter half of the 2020s could see software and content become principal differentiators, though much will hinge om forthcoming efforts like Apple's more full-fledged 'LLM-based Siri'.

Gaming anticipates this shift to software. Sony has already recast itself as an entertainment-IP company with a manufacturing wing attached (previously, it was the other way around). Xbox has bet big on licensing and subscriptions, even selling former 'console exclusives' like *Halo* to PlayStation users.

From there, who knows? Tomorrow's breakthrough gadget could even be... screenless. Reports hint that Jony Ive and ChatGPT are exploring such a path for OpenAI's first device release. If so, the category's centre of gravity might finally move beyond smartphones – almost 20 years after the iPhone's debut. Regardless, the category and its consumers seem primed for further Meaningfully Different disruption. But until then, brands shouldn't underestimate the power of predisposition to drive annual gains.

Geography may also become a more salient factor going forward. We take it for granted that top brands still sell basically the same handsets worldwide. That may change in the years to come as regulations evolve (see the EU's mandates on USB-C and 'right to repair'). Brands might also take note of how TECNO, Infinix, and Xiaomi are succeeding in Africa, where handsets are smartly tailored to local needs (think multiple SIM card slots, camera tuning for darker skin tones, and longer battery life).

All Top 10 brands improve some aspect of predisposition



Source: Kantar BrandZ, Top 10 Most Valuable Consumer Technology & Services Brands, 2025-2026

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Rethinking AI – focus on what consumers value

AI is reshaping technology manufacturers' strategies, influencing both product development and marketing approaches. In the rush to introduce new AI capabilities, many companies focus on novelty rather than consumer need, producing a range of low-value or underused features often referred to as 'AI slop'.

Research indicates that consumers are less interested in entirely new AI experiences and more in features that enhance their existing interactions with devices. When evaluating smartphones, the most valued AI functionalities include voice assistants, real-time language translation, and the ability to search the web using images. These features support core tasks and improve usability rather than adding complexity.

Manufacturers that invest in understanding consumers' jobs to be done, and how users want technology to fit into their daily routines, can prioritise AI development more effectively. This approach not only increases adoption and satisfaction, but also reduces wasted effort on features that do not deliver meaningful value.

CONSUMER TECHNOLOGY AND SERVICES PLATFORMS

BRAND SPOTLIGHT

DOORDASH

2026 BRAND VALUE

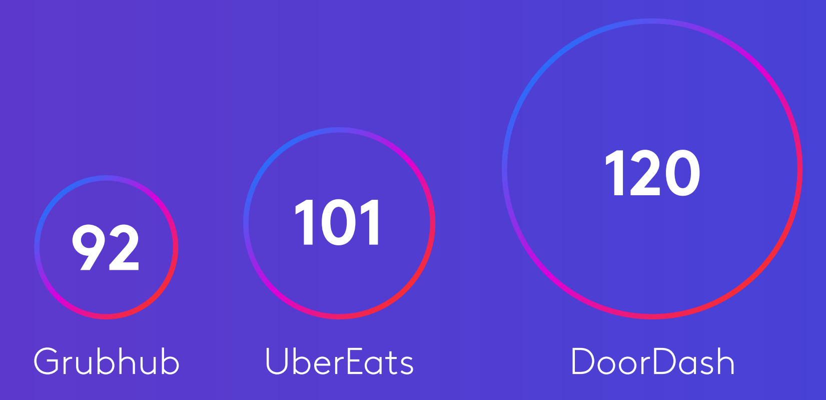
$26,533 M

New

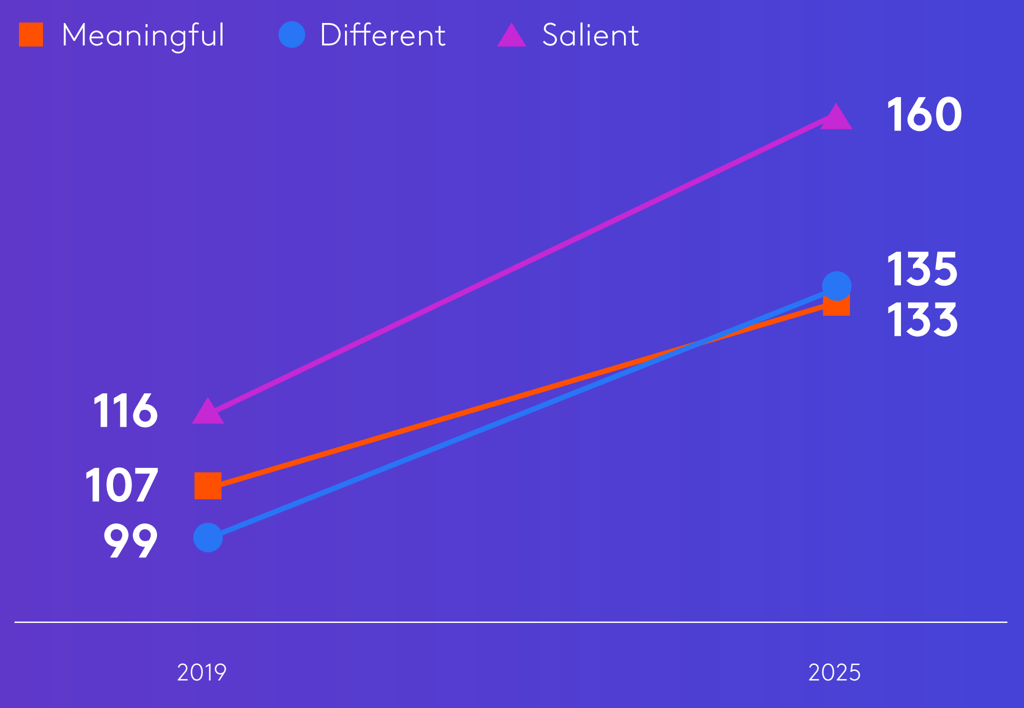
A better, broader ecosystem

DoorDash has quickly evolved from a standalone food delivery app to a local commerce ecosystem platform with a focus on great customer experience. Expansions into restaurant bookings, convenience, alcohol, and other retail exist side by side, seamlessly part of the brand's DashPass ecosystem. AI and localisation combine to make the offer sing: these days, DoorDash's 'living homepage' combines past order history with local context to provide suggestions; the app also adds its own 'smart tags' to menu items to help its users build their baskets. DoorDash has a local-first mindset, moving into smaller cities and suburbs ahead of competitors while striking resonant merchant partnerships. The goal? To position itself as a local utility rather than a slick Big Tech platform.

Future Power in 2020, US



DoorDash brand equity, US



Source: Kantar BrandZ, USA, Online Takeaway Food Ordering, 2019-2025

BRAND TO WATCH

ONEPLUS

Positioned as a 'category-killer' alternative to Apple and Samsung's high-end smartphones, **OnePlus** has successfully gained traction in the USA and other export markets – creating new growth lanes for its Chinese parent company Oppo.

Future Power Index

126

Source: Kantar BrandZ, China, Mobile Phones, 2024

IMPLICATIONS

01

OUTCOMPETE ON MEANINGFUL DIFFERENCE

The consumer tech world stands out for its fast pace of innovation – plus a consumer base that's actually eager to try new offerings. Still, tech brands are built like any other. This means creating a Meaningful Difference advantage should still lie at the heart of any business plan, whether it's a startup or a large business. Because yes, lots of tech companies end up benefitting when times are good – but even then, the strongest brands still outperform.

FAST FOOD

FAST FOOD TOP 10:

Brand	Brand Value (US$M)
MCDONALD'S	$235,095
STARBUCKS	$66,210
KFC	$32,180
CHIPOTLE	$17,507
DOMINO'S PIZZA	$14,756
SUBWAY	$11,200
TACO BELL	$10,576
CHICK-FIL-A	$9,897
PIZZA HUT	$9,287
BURGER KING	$8,687

Source: Kantar/Kantar BrandZ (including data from S&P Capital IQ and Euromonitor)

DEFINITION:
The Fast Food category includes quick service restaurants (QSR) and casual dining brands, which vary in customer and menu focus, but mostly compete for the same dayparts.

ORDER UP/
FAST FOOD BRANDS COURT YOUNG DINERS

Category Brand Value Year-on-Year Change **+2%**

Fast Food Top 10 Total Brand Value **$415,394 M**

FAST FOOD

The value of the world's top Fast Food brands grows by 2% this year.

It's been a year of intense competition. Challenger brands worldwide are eager to break up the major players' dominance. One way they've done so is by zeroing in on areas like tea, pastry, and ice cream that the big US brands typically haven't pursued.

Challengers also tend to focus on a few key consumer segments and hero items, rather than trying to have something for everyone. Low-cost lemon tea and ice cream specialist Mixue Bingcheng, for example, eschews prime downtown locations in favour of mid-street stalls in student neighbourhoods. Mixue recently surpassed McDonalds in total store count worldwide, as part of a wave of Chinese brands expanding abroad.

What do young diners want? And just as importantly, what do they feel they can afford? These are crucial questions for fast food brands of all sizes. One important answer to both questions, and across multiple dayparts, is drinks as an affordable 'sweet treat'.

It's why Taco Bell has gone all-in on expanding its Baja Blast platform into freezes, energy-style drinks, and seasonal drops. And why Chick-fil-A continues to scale its Peach Milkshake and Sunjoy strategy, blending nostalgia with limited-time beverage releases. The race is on, in other words, for momentum – for excess Meaningful Difference that fuels expansion into new domains like drinks.

Meanwhile, food items are slimming down as consumers shift from 'bigger is better' to 'right-sized indulgence'. In the US, Kantar Retail data shows that approximately 10% of adults already use GLP-1 drugs. And that number should only rise.

There's also a search for value options. In an era where 'premium' bowls at quick-service chains can cost over $15, new $5 offers at previously struggling chains like Burger King and Subway have hit.

Global expansion is another big theme for top brands. Even as Starbucks eases up on its China push, McDonald's and KFC continue to see that market as essential to their future growth.

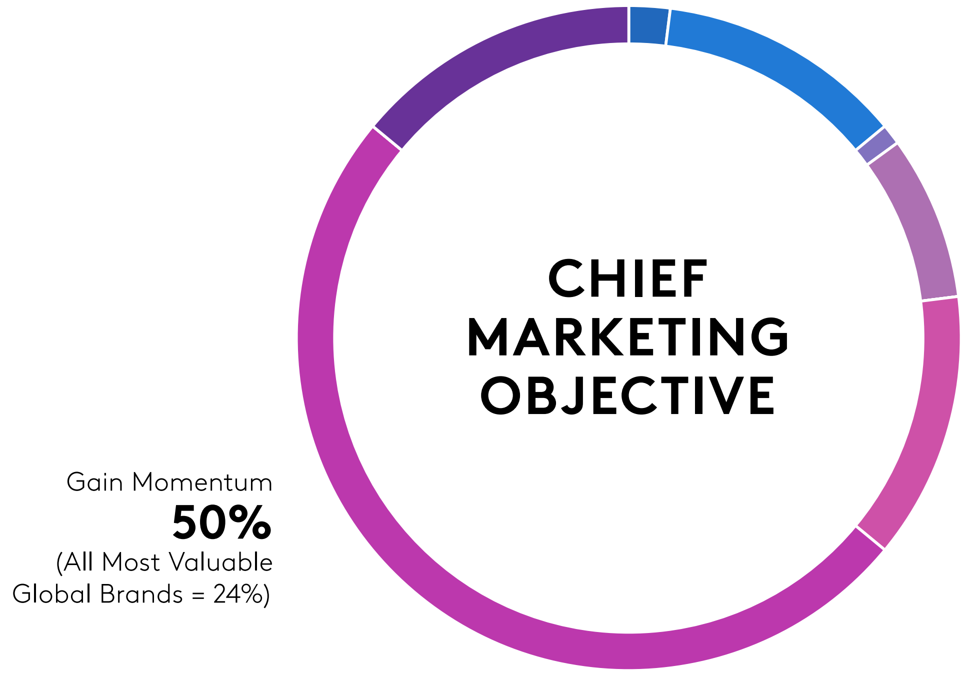
Last but not least is the rise of advanced AI. Globally, AI-driven personalisation and predictive menus are redefining that first moment of truth: the mobile order.

As mobile orders can often exceed 60% of QSR transactions in major markets, the digital storefront has effectively become the new drive-thru lane. And it's a lane that's powered by algorithms, not live attendants.

As such, ordering platforms now anticipate preferences, adjust recommendations by time of day or weather, and even tailor combos to dietary needs.

Top brands could unlock growth by gaining momentum

% of Fast Food Top 10 within each Objective



Source: Kantar BrandZ, Top 10 Fast Food Brands; Most Valuable Global Brands 2026

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Delicious isn't enough

A common myth that still exists among QSR brands is that taste is the sole guarantor of loyalty. While taste is still king, it no longer rules alone. In a region where delivery penetration is among the highest globally, the crown is now shared with the logistics of indulgence. More than one in three fast-food moments now occur via an app. In this delivery-first economy, the psychological perception of indulgence – that specific craving for a crispy, hot reward – is fragile. If a premium chicken sandwich arrives lukewarm or fries lose their structure, the taste is irrelevant. The consumer doesn't blame the courier; they devalue the brand.

In the GCC, where extreme heat and high expectations for speed intersect, delivery experience has become the ultimate non-negotiable. You can survive a slight delay, but you cannot survive soggy fries. So, for regional operators, acing the market means realising that your product isn't just the food: it's the temperature and texture at the moment of the first bite. If the delivery fails the indulgence test, the brand fails to secure the future order. Success requires new-age packaging and AI-optimised routing that ensures little to no taste difference between at-store and at-home experience.

FAST FOOD

BRAND SPOTLIGHT

2026 BRAND VALUE

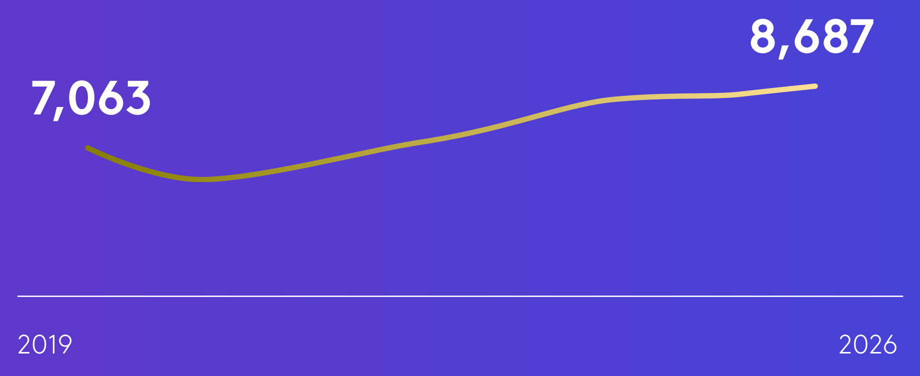
$8,687 M

+4% vs 2025

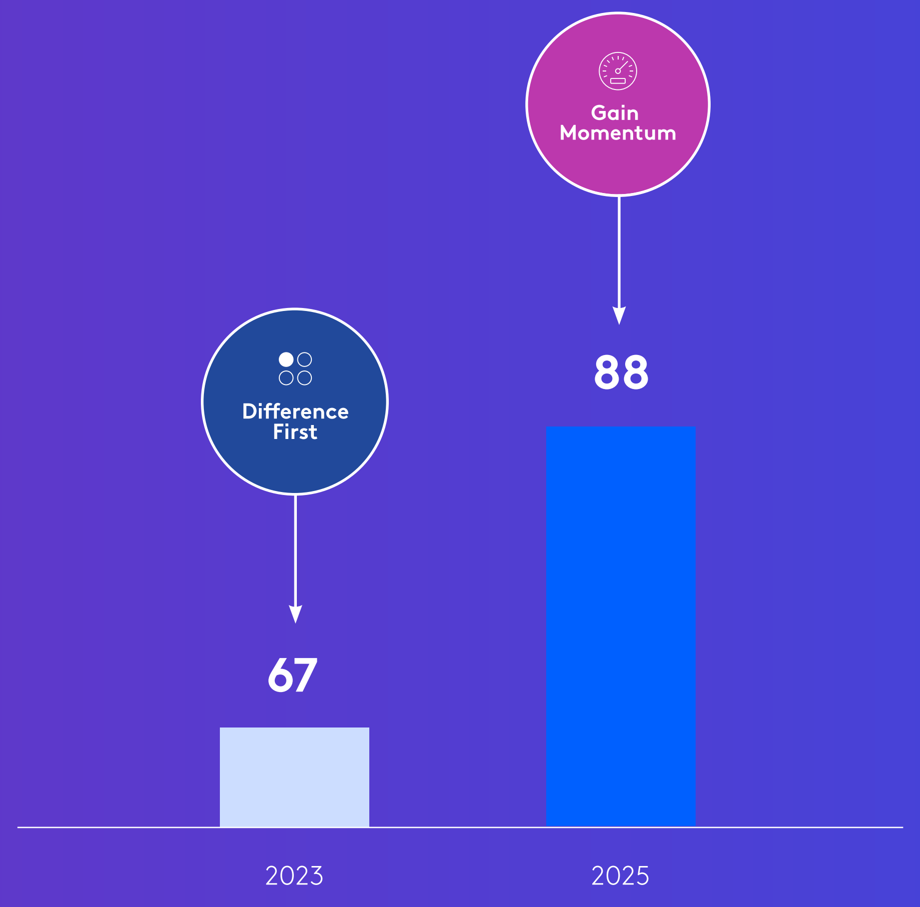
Fanning the flames of growth

Burger King stopped chasing category sameness (chicken, wraps, mimicry) and doubled down on what it most credibly owns: flame grilled burgers and the Whopper. Whopper-led flavour innovations make Burger King feel more distinctive and more expert than its peers who treat burgers as interchangeable. The result is stronger perceived differentiation on taste, scale, and burger authority. This clarity has been reinforced through large scale restaurant refreshes and digital upgrades. Importantly, Burger King has modernised without losing its edge, keeping flame grilled cues and humour front and centre. These days, Burger King's experience matches its promise much more closely, making the brand feel dependable and distinct.

Burger King Brand Value (US$M)



Difference Index, US



Source: Kantar BrandZ, US, Fast Food, 2023–2025

BRAND TO WATCH

Founded in 1993, **Texas Roadhouse** is a casual steakhouse chain in 800 locations, known for its hand cut steaks, generous portions, and family friendly atmosphere. It has a reputation for serving smaller US communities that other brands miss.

Future Power Index

122

Source: Kantar BrandZ, USA, Casual Dining, 2024

IMPLICATIONS

01

REVAMP THE HERITAGE

Fast food brands with momentum unlocked better brand value growth this year. In a highly competitive category, fast food brands need to build on their strong cores to revive and refresh what already works. Through innovations and bolder marketing, they must build on these heritage assets to excite new generations.

02

GAIN MORE AI PRECISION

In a mature and crowded category, growth comes from being sharper, faster, and more relevant – not merely visible. Fast food brands should use AI to identify their highest-potential products, audiences, and occasions. Personalising at scale and learning fast about what works is where AI excels.

FINANCIAL SERVICES

FINANCIAL SERVICES TOP 20:

Brand	Brand Value (US$M)
VISA	$228,570
MASTERCARD	$184,721
AMERICAN EXPRESS	$80,316
J.P. MORGAN	$76,651
CHASE	$63,078
WELLS FARGO	$52,904
RBC	$51,480
ICBC	$50,513
HDFC BANK	$47,507
COMMBANK	$43,306
STRIPE	$40,187
PING AN	$37,219
MORGAN STANLEY	$36,509
AGRICULTURAL BANK OF CHINA	$36,332
BANK OF AMERICA	$35,942
CHINA CONSTRUCTION BANK	$30,302
CHINA LIFE	$29,762
HSBC	$29,558
MERCADO PAGO	$27,721
TD	$27,065

Source: Kantar/Kantar BrandZ (including data from S&P Capital IQ)

DEFINITION:
The Financial Services category includes retail, business, and investment banking institutions; and insurance players from both the B2C (life, property, and casualty) and B2B sectors and payment brands.

CREDIT WHERE DUE/ THE COMEBACK CONTINUES FOR FINANCIAL SERVICES

Category Brand Value Year-on-Year Change **+20%**

Financial Services Top 20 Total Brand Value **$1,209,643 M**

FINANCIAL SERVICES

The world's top Financial Services brands rise in total value by 20% this year, led by strong performance in North America and Asia.

Marketing for the category looks quite different these days. It's been revamped to foreground Meaning. As top payments brands jockey for wealthier clients, they have reinvented themselves as lifestyle players. These days, their products are more than simple payment tools: they're passports to 'the good life' and are marketed as such.

How exactly brands define that good life is the key to their Meaningful Difference. Usually, it involves some combination of travel benefits, curated experiences, and lounges. This is a space that American Express used to have to itself, but the field has grown crowded. (In response, American Express has revamped its Platinum offering with $3,500 worth of bundled benefits.)

Zoom out on these perks wars, and what you see is a larger story of sector convergence. The technology, retail, travel, and entertainment worlds have become so intermixed – and so, too, have these categories' advertising codes.

For instance, a recent campaign from Chase starred supermodel Hailey Bieber and looked a lot like glossy fashion ads – with a giant Chase Sapphire Reserve card in the 'hero spot' usually reserved for a handbag. And why not? Brands know they need stand out in a crowded media market, especially now that digital players like Apple Pay are also spending big to predispose more people. Still, there are two levels to achieving predisposition: Meaningful and Difference. And what our intelligence shows is that offering the same Meaningful perks and reassurances as others is not enough – brands grow when they're more Different and extending perceptions of difference is key to unlocking more value for Financial Service brands.

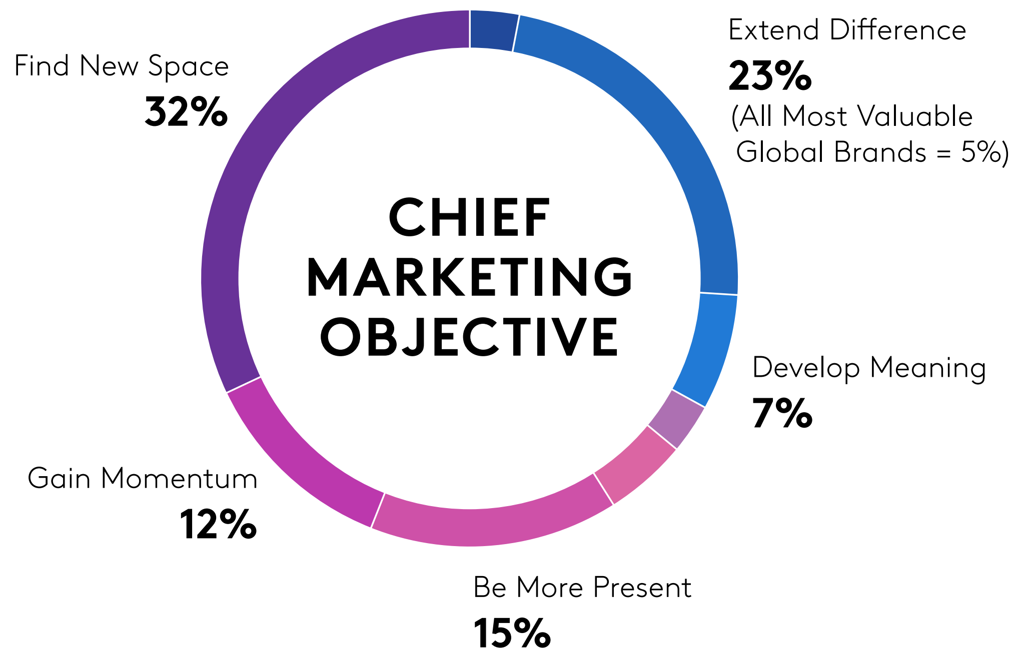
Meanwhile, large legacy players like Visa still have an edge in how they show up at big events worldwide (including both the Olympics and the FIFA World Cup this year). But brands also need to Be More Present every day – which is why podcast ads and short-form video have become an important part of the category's media mix.

It can also pay to Find New Space. For example, Mastercard Commerce Media is an RMN operating in the brand's owned channels as well as through bank and other publishing outlets worldwide. It uses proprietary insights from transactions processed by Mastercard to deliver enhanced returns on ad spend.

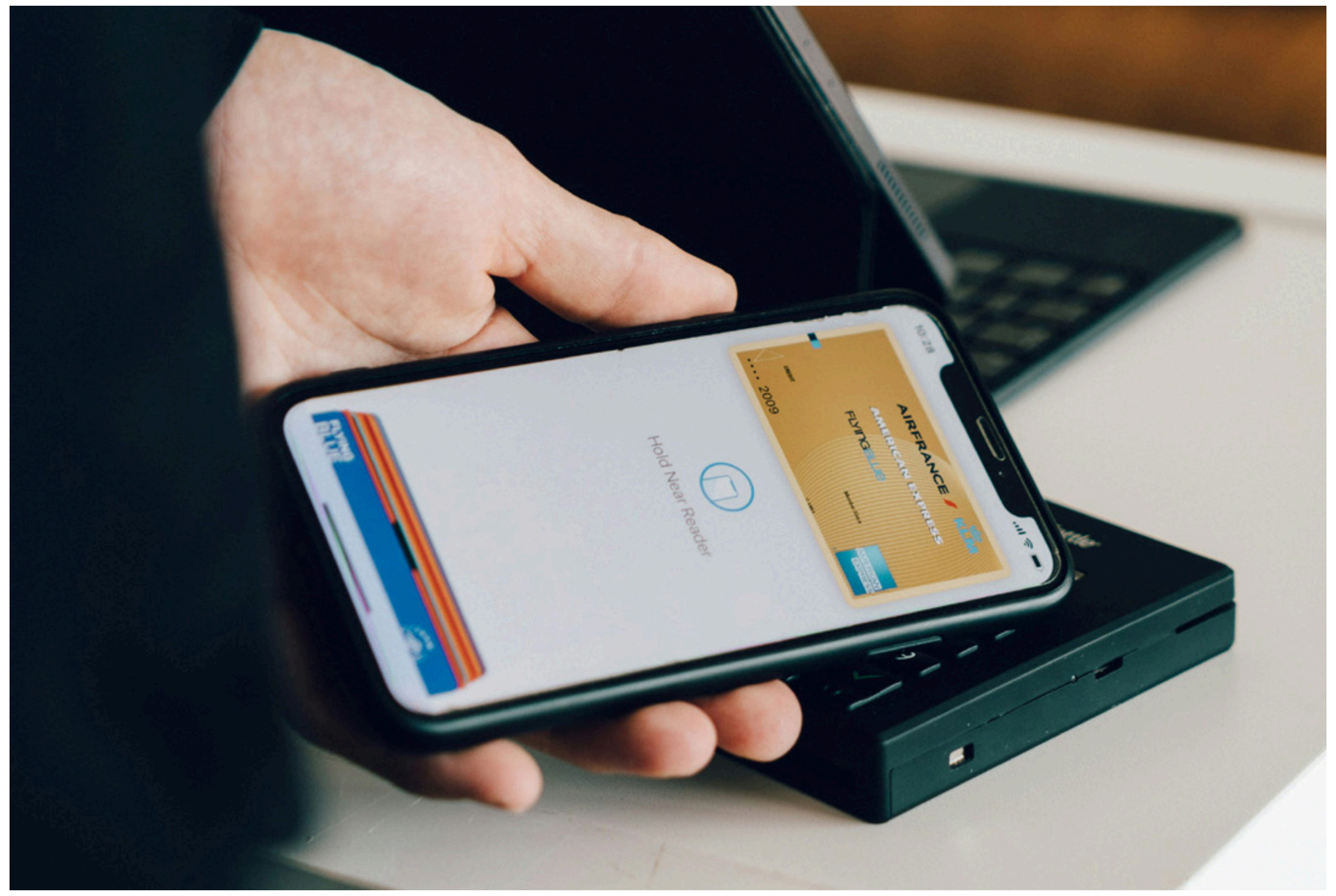
Back in the consumer sphere, there has also been a shift toward emotive Meaning in spheres like property, casualty, and life insurance, as well as in asset and wealth management. And at the high end, brands across these sectors have layered in more personalised, concierge-style services.

Some top brands could stand to build Difference

% of Financial Services Brand Value within each Objective



Source: Kantar BrandZ, Top 20 Financial Services Brands; Most Valuable Global Brands 2026



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The end of incremental wins

Financial services spent years trying to win with incremental change. The category leaned hard on being known, long-lasting, and safe. Messaging blurred into a chorus of vague reassurance, and creative effectiveness was rarely creative or effective. The sameness was survivable until the goalpost moved. First a little. Now a lot.

The competitive set is getting bigger and weirder: banks, fintechs, insurers, platforms, credit builders, wallets, BNPL, retailers, MrBeast. New entrants arrive regularly, each proclaiming permission to play as the epicentre of a financial life. The category is now a daily behaviour system, with many building their own best-of-breed fintech stacks.

Customers have changed, too. People don't just hear claims; they fact-check. They use more sources, trust fewer promises, increasingly consult AI, and switch faster because they can. Quiet quitting hides the loss as accounts are kept but deprioritised.

Some brands are opening fresh revenue lines, including financial media networks (e.g. Chase, PayPal, Revolut). That may help the bottom line, but it can't replace a Meaningfully Different brand.

The opportunity is a barbell: make money management feel easier and make people feel understood at the same time. Trust in financial services institutions is abysmal, but trust in 'my' experience is still available. Winning brands are seen and heard, but also felt.

FINANCIAL SERVICES

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ASEAN's insurance future will be built locally, not imported

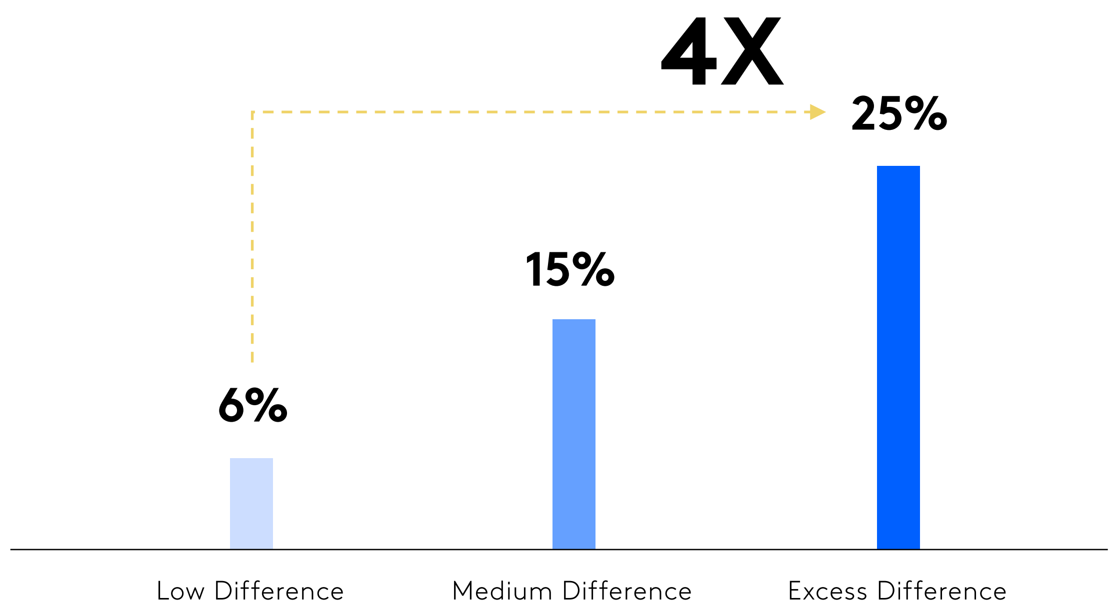
While awareness and adoption still vary, Southeast Asia's digital ecosystems are redefining how people encounter insurance – turning it into simple, everyday add-ons. Superapps, wallets, and marketplaces are unlocking micro-cover and parametric protection that activates automatically when weather or travel disruptions occur; paving the way for higher penetration through culturally tuned, mobile-first experiences. Regulatory support through sandboxes and eKYC is accelerating access – but trust, literacy, and a smooth claims experience remain the real determinants of scale.

In Indonesia, platforms like Gojek/GoPay and Tokopedia seamlessly bundle device, travel, and accident cover into daily transactions, while agri-parametric pilots aim to protect smallholders across disaster-prone islands. Thailand's TrueMoney and leading bank apps are testing instant health and accident products, often linked to telemedicine or farmer cooperatives.

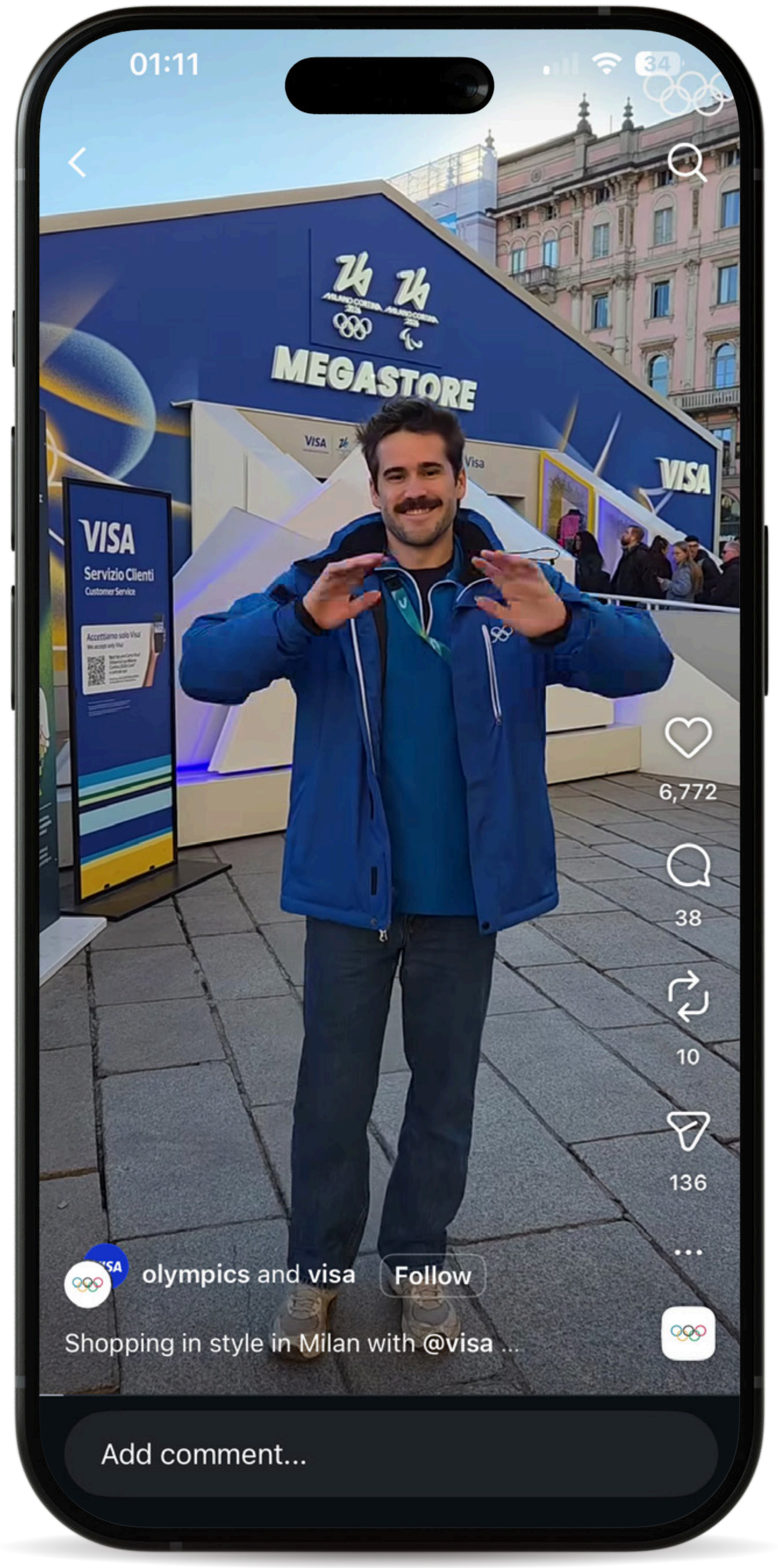
Vietnam's MoMo, ZaloPay, and Viettel ecosystems are pushing mobile-first distribution with simple hospital cash, and with motor and cargo add-ons. This is supported by hybrid agentic servicing to reach rural communities.

The brands that win next will localise value with plain language, transparent pricing, and fast payouts. When insurance feels like help rather than paperwork, adoption follows. Thus, protection across the region is lifted by meeting people where they already save, spend, and borrow.

Difference is strongly linked to growth
Chance of growth based on equity



Source: Kantar BrandZ, chance of growing (net) based on equity in starting year, 2014-2023.



There's also plenty of change afoot in the entry-level market. In the United States, fintech player Chime has grown rapidly by offering low-fee accounts, early access to wages, and a mobile-first experience. Similar models are also gaining ground in Latin America, Asia, and Africa, where mobile-first fintechs are targeting previously unbanked populations – the young, the rural, and the elderly – in support of countries' sustainable development goals.

Incumbent brands have responded on several fronts. Many are re-emphasising physical presence and human advice, as in the case of the hundreds of small-format Banking Outlets that HDFC Bank has opened in previously 'unbanked' villages across India. At the same time, brands are using advanced AI to deliver more predictive services, smoother mobile experiences, and 'stickier' financial education tools tailored to specific demographic groups like Gen Z.

Will the end point of these digital innovations be more payments-integrated super apps like those seen in Southeast Asia (Grab, Gojek, MoMo) and China (WeChat Pay and Alipay)? Absolutely, if the Chinese brands have something to say about it, now that a maturing domestic economy has spurred them toward expansion abroad. The big Chinese bank brands also have a role to play here, as they work to stand up the government's vision for a 'digital yuan'.

FINANCIAL SERVICES

BRAND SPOTLIGHT

2026 BRAND VALUE

$80,316 M

+22% vs 2025

American Express has doubled its brand value since 2024, significantly outperforming other payment brands in the ranking.

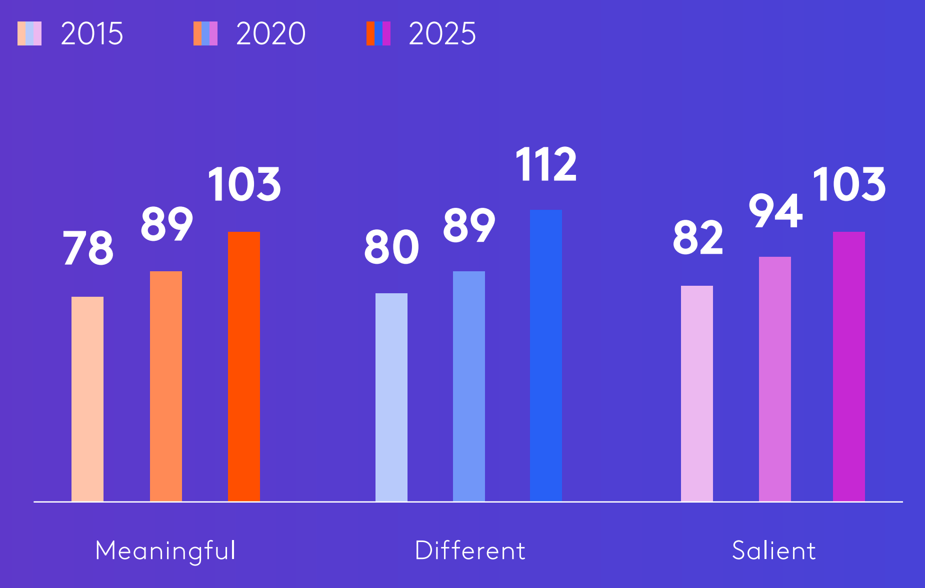
Building Meaningful Difference

American Express has built strong audience connections by acting as a curator of experiences, as opposed to just a facilitator of transactions. The brand has created cultural currency out of its early ticket sales and other cardmember-only experiences. Rather than sponsoring from the sidelines, Amex unlocks priority access, making participation in live culture feel more attainable, exclusive, and emotionally rewarding.

Amex has shifted its messaging to celebrate more founders, side hustlers, and creators, positioning itself as a partner to modern ambition rather than a badge of traditional wealth. As a result, Amex's marketing has successfully refreshed its position as a premium 'membership brand', using experience-led storytelling and data-powered personalisation to drive growth among affluent young people.

American Express Brand Value (US$M)

American Express – US



Source: Kantar BrandZ, US Payment Brands, 2015–2025

BRAND SPOTLIGHT

2026 BRAND VALUE

$43,306 M

+35% vs 2025

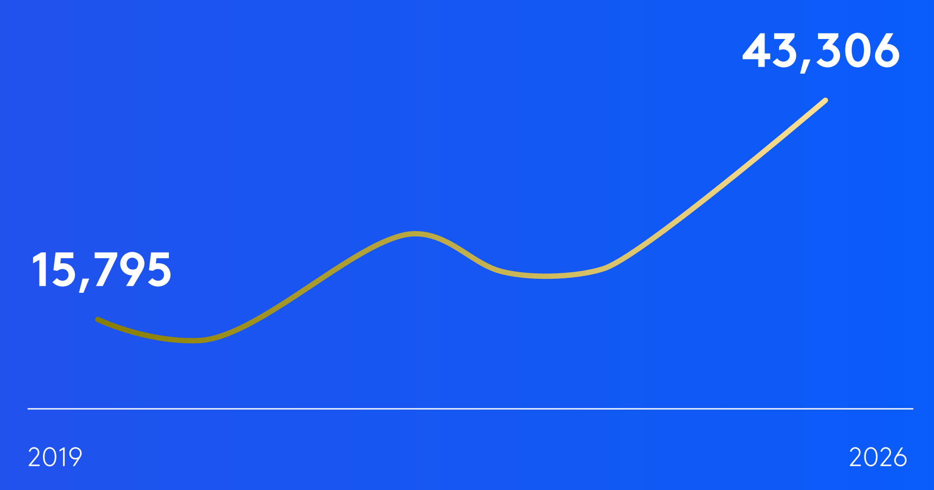
Success through brand investment

Australia's CommBank has enjoyed a long run of strong year-on-year performance, almost tripling its brand value since before the pandemic.

Three of CommBank's most important marketing initiatives have enabled this outsized growth streak – even when economic pressures were running against it. First, its AI-driven app acts as a daily financial wellbeing platform for CommBank clients. It offers personalised prompts, predicts bills, helps prevent scams, and sorts customers into smaller segments for more tailored support.

Second, the bank's refreshed brand identity and emotional repositioning has made it a symbol of optimism and resilience. Today, CommBank's iconic yellow diamond stands for 'Can Lives Here', a message which the bank proves out through its big push to revamp creative communications. Third, Commbank now leans much more heavily on real customer stories of resilience, progress, and everyday achievement. The result has been more authenticity, emotional connection, and Meaning.

CommBank Brand Value (US$M)



CommBank – Australia
Average Future Power 2019-2025

Source: Kantar BrandZ, Australia Banking & Business Banking, 2019–2025

FINANCIAL SERVICES

BRANDS TO WATCH

monzo

Monzo combines a genuinely customer led product experience with rapid innovation in personal finance. More than just another digital bank, it's become a trusted everyday financial partner for millions of UK clients.

Future Power Index

125

Source: Kantar BrandZ, UK, Banking, 2025

With over 122 million customers, **Nubank** is Latin America's largest digital bank. It has a clear point of Difference, offering innovative products to a client base that includes many formerly unbanked Brazilians, Mexicans, and Colombians.

Future Power Index

132

Source: Kantar BrandZ, Brazil, Banking, 2025

IMPLICATIONS

01

GROW THROUGH A SENSE OF DIFFERENCE

Financial services is crowded with similar offers. Apps, rates, and customer journeys often look alike. In a commoditising field, growth depends on perceived Difference: a sense that your brand offers something that no one else can. Position your bank cards, insurance policies, and investment products as signals of who your client is – and who they want to become.

02

USE CULTURE TO BUILD MEANING

Cultural relevance ties brands to the lives, values, and aspirations of their clients. For financial services brands, achieving this means looking beyond sponsorships and surface-level activations. It could involve aligning movements around themes like financial empowerment, small-business creativity, sustainability, sport, music, local pride, and digital self-expression. Being Meaningful also comes from designing products and experiences that feel native to people's cultural worlds.

FOOD AND BEVERAGE

FOOD AND BEVERAGE TOP 20:

Brand Value (US$M)

COCA-COLA[1]	$113,000
RED BULL[2]	$24,178
NONGFU SPRING	$20,121
PEPSI[3]	$16,242
LAY'S	$13,317
MONSTER	$12,273
LINDT	$11,706
YILI	$10,949
NESPRESSO	$10,354
NESCAFÉ	$9,599
FANTA	$8,649
KINDER	$8,587
SPRITE	$8,448
DIET COKE[4]	$8,324
BRITANNIA	$6,494
GATORADE	$5,895
DORITOS	$5,626
CADBURY	$5,305
EASTROC SUPER DRINK	$5,233
DR. PEPPER	$5,055

1. The Brand Value of Coca-Cola here does not include Diet Coke and Coca-Cola Light, 2. Red Bull includes sugar-free and Cola, 3. The Brand Value of Pepsi includes Diets, 4. Diet Coke includes Diet Coke and Coca-Cola Light
Source: Kantar/Kantar BrandZ (including data from S&P Capital IQ and Euromonitor)

DEFINITION:
The Food and Beverage category includes non-alcoholic ready-to-drink beverages: carbonated soft drinks, juice, bottled water, functional drinks (sport and energy), coffee and tea (hot and iced), packaged foods including snacks, meal and culinary brands, dairy products, and confectionery.

INTELLIGENTLY DELICIOUS/ TOP BRANDS FIND SPACE TO GROW

Category Brand Value Year-on-Year Change **+8%**

Food and Beverage Top 20 Total Brand Value **$309,357 M**

FOOD AND BEVERAGE

The world's top Food and Beverage brands grow by 8% this year.

That's a testament to the category's pivot back toward Meaningful. The category's headwinds are well known. Consumer tastes are shifting as household budgets tighten. Changing views on health and processed foods have dampened sales of some SKUs. And overall, there's rising mistrust in the food system.

And yet top brands have found new ways to grow, as have challengers. They have done so by accepting that the world has changed – and then choosing to work *with* these changes to meet needs.

This is especially true with regard to health and wellness. As Kantar's Modern Health model outlines, consumers are clear in their goals, which include empowerment, longevity, adaptive health, metabolic optimisation, and nutritional integrity.

For FMCG brands, these domains offer generational growth opportunities. But seizing them has meant reformulating portfolios, elevating ingredient literacy, and innovating around clean-label functional benefits. Brands must also work to overcome trust deficits (e.g., by working with influencers in the wellness and fitness worlds).

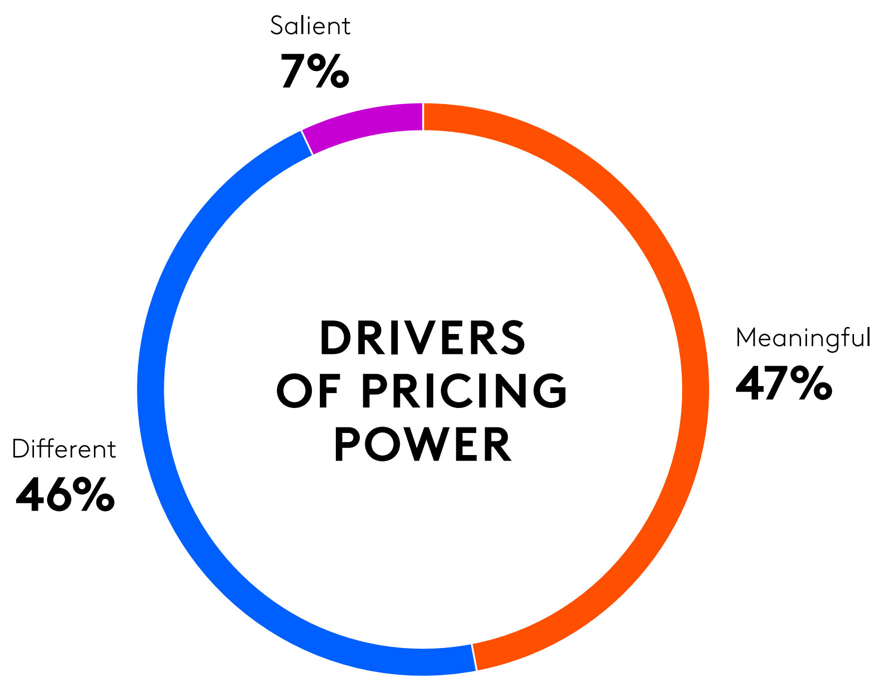
The good news for brands is that wellness isn't easy. Consumers often struggle to meet their goals when going it alone, even when taking GLP-1 medications. That's where food and beverage players step in, with innovations that make nutrient-dense eating more convenient.

Add affordability to the mix and another opportunity comes into focus: snacking. According to Kantar Global MONITOR, snacks have become a major part of how consumers manage nutrition: 41% percent of global consumers say they prefer snacks to large meals, rising to 48% among Gen Z. Brands take advantage of this whenever their portion-controlled, on-the-go options seem much lower priced than mealtime entrées.

Lower priced, but not necessarily *low* priced – because there's still plenty room to win on 'premium' here by selling consumers something new. Rather than raising prices on existing ranges, it's about elevating experiences through unique flavours, sustainability, and health-forward positioning.

This can work even in markets tilted toward more 'aspirational' consumers. Consider the Indian food brand Britannia. Britannia operates in a national market where most shoppers are looking to stretch their budgets, and where sachets, individual portions, and other small formats predominate. Small-pack innovation is thus a key domain for innovation. But it turns out Indian consumers are *also* attracted to new, 'better-for-you' propositions like high-fibre millet biscuits. Sell these at the right small pack size and price, and you get a snack that's both accessibly priced *and* premium. In other words, a winner.

Being Meaningful drives Pricing Power



Source: Kantar BrandZ, Food & Beverage all categories, 2023-2025, 236 categories

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Beyond scale – the structural shift to quality

China's dairy industry has entered a definitive 'quality-driven era', moving beyond volume expansion to structural upgrades in nutrition, technology, and sustainability. Leading players like Yili exemplify this shift by evolving from milk suppliers to comprehensive nutrition solution providers.

First, product innovation is becoming highly specialised. The success of the 'Xinhuo' series for senior nutrition, now collaborating with traditional medicine experts like Tongrentang, highlights a pivot toward functional and medical-grade nutrition.

Second, technological self-reliance is reshaping the supply chain. By achieving domestic production of key raw materials like lactoferrin and expanding into high-value B2B deep processing, Chinese brands are securing quality at the source.

Finally, sustainability is no longer optional but a core growth driver. With milestones like zero-carbon factories and an MSCI ESG rating of AA, the industry is proving that green manufacturing builds brand trust.

This structural growth model – balancing premiumisation, scientific R&D, and ecological responsibility – offers a blueprint for the global dairy sector, demonstrating that the future lies in value creation rather than mere scale.

FOOD AND BEVERAGE

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GLP-1 is creating a new hydration occasion

Brands are only starting to recognise the many ways GLP-1 medications are reshaping the food and beverage landscape. In Kantar's GLP-1 research, the most consistent recommendation patients receive from healthcare professionals is simple: drink significantly more water.

For beverage brands, this shift represents something much bigger than a product trend – it signals the emergence of an entirely new consumption occasion.

In Kantar's Blueprint for Brand Growth, one of the most powerful accelerators is the ability to find new space, to become Meaningfully Different to more people. GLP-1 is creating exactly that opportunity for brands that see and act on the data signals. Hydration is evolving from a moment of refreshment into a functional health routine connected to appetite management, metabolic health, and daily wellness.

Working with a global beverage company, we helped translate this insight into immediate commercial action. We advised the brand to move quickly with a major retail partner to highlight hydration solutions for GLP-1 users through dedicated digital pathways and targeted in-store visibility activations. By aligning brand innovation with this emerging health mission, the brand was able to capture new occasions and accelerate growth in a space competitors had yet to claim.

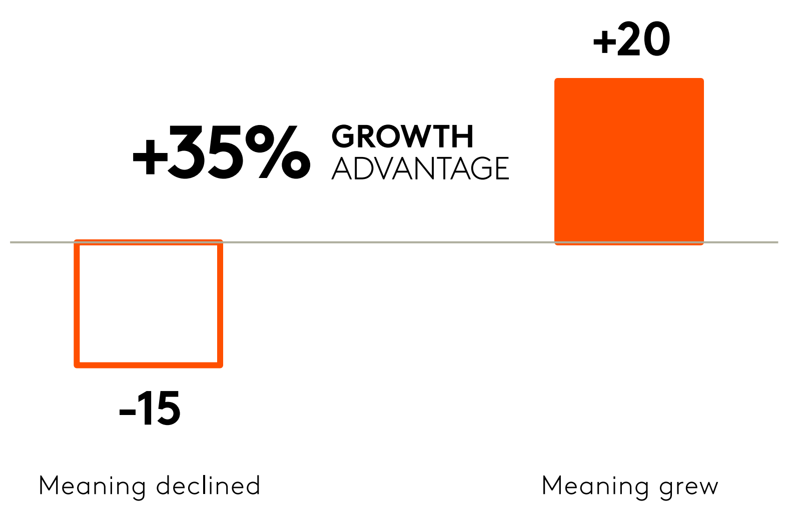
Creating new products is one task; popularising them is another. Enter 'manufactured virality': coordinating large numbers of micro-influencers to simulate organic buzz. Why? Because buzz sells. In a recent Kantar U.S. MONITOR survey, 64% of Gen Z agreed with the statement, 'I like to keep up with and try out the latest food trends'.

To *inspire* these trends – i.e., to run ahead of the market – brands must be even more agile than consumers. It's about aligning with culture to build Meaning. Large brands can still do this, as Doritos has shown through its success with TikTok challenges and gaming partnerships. But challenger brands' smaller size tends to make them bold and agile. These days, they also tend to *launch* with functional health claims and benefits, rather than having to layer them in later as legacy brands often do.

Ultimately, though, both types of brands can – and will – succeed. In China, soft drink challenger Genki Forest has positioned itself from the start as proudly sugar-free. At the other end of the legacy spectrum, dairy giant Yili has rolled out innovative new fortifications like its Xinhuo milk powder series aimed at middle-aged drinkers. Both brands have leveraged wellness to win at home despite deflationary pressures in the Chinese market – even as both are now expanding abroad to seek even higher rates of growth.

It pays to improve Meaningful connections

Brand Value growth advantage, 2019-2026



Source: Kantar BrandZ, Top 20 Food & Beverage brands, 2019-2026

Broadly speaking, here's how national brands can adapt in this age of fragmentation and shifting needs. First, they should get modern. Legacy brands can no longer rely on heritage alone. Brand storytelling needs to be refreshed with cultural cues aligned to sustainability, inclusion, and wellness – and with an eye toward building Meaningful Difference. Brands must also be unafraid to explore new spaces and categories.

Second, top brands should use size to their advantage by making data a moat. Large FMCG companies typically enjoy superior access to consumer and shopper data. Used well, these brands' 'trend engines' can anticipate emerging needs and micro-segments while cooking up new ideas that really hit. They can then apply similar tech prowess to the task of stoking user-generated content and other social buzz.

FOOD & BEVERAGE

BRAND SPOTLIGHT

Red Bull

2026 BRAND VALUE

$24,178 M

+22% vs 2025

Building Meaningful connection

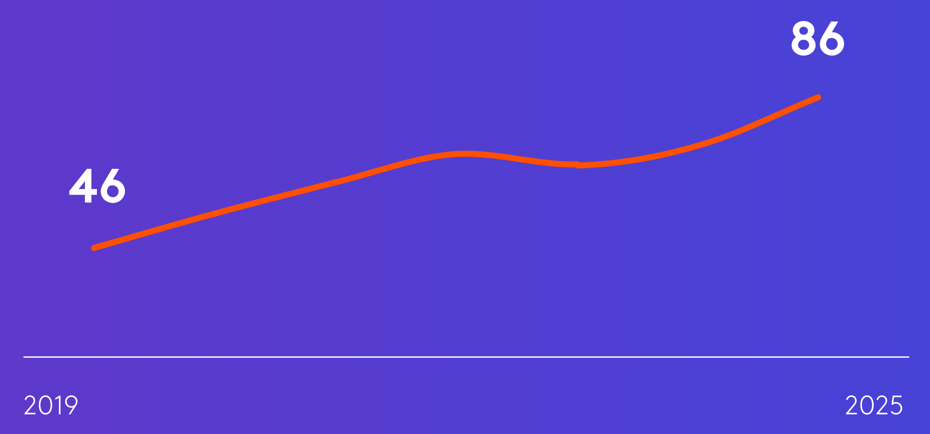
Red Bull has built strong audience connections by positioning itself as a cultural participant rather than simply an energy drink brand. By making long-term investments in communities and moments that young people care about, Red Bull acts as an enabler, not a sponsor. This approach is reflected in its deep integration into local sports, music, and creative cultures worldwide. These efforts include Red Bull Rampage in the US; Red Bull Batalla in Latin America, the Red Bull Music Academy in Europe; and investment in esports and creator led gaming across China and Southeast Asia.

Red Bull Brand Value (US$M)

Red Bull – US

— Meaningful

Red Bull has a strong rebel personality and has built Meaningful Connections over time



Source: Kantar BrandZ, US Soft Drinks, 2019-2025

BRAND SPOTLIGHT

Yili

2026 BRAND VALUE

$10,949 M

+9% vs 2025

Global brand equity

MEANINGFUL **146**

DIFFERENT **133**

SALIENT **194**

Meaningful innovation

Yili's focus on Meaningful innovation is in line with its Chief Marketing Objective – Find New Space. It has pioneered high-value, shelf-stable dairy technologies, including room-temperature yoghurt that maintains taste and texture without relying on the cold chain. It has also moved beyond traditional dairy into health and hydration, with products such as Shuhua lactose-free milk for digestive comfort. Yili has embraced sustainability in innovative ways, with offerings such as carbon-neutral organic milk made using renewable energy and lower-impact packaging.

Source: Kantar BrandZ, Most Valuable Global Brands, global data, 2026

FOOD & BEVERAGE

BRANDS TO WATCH

い·ろ·は·す

Coca-Cola owned Japanese water brand **I-LOHAS** reflects a wider shift in Asia toward clean labels, sustainability, and understated premiumisation (achieved here through nuanced flavours like Shine Muscat and Salt and Lemon). This shift is particularly pronounced among younger and more health-conscious people.

Future Power Index

132

Source: Kantar BrandZ, Japan, Water, 2025

Nestlé NIDO

Backed by Nestlé's science and scale, **Nido** has expanded into age-specific formulations for a wide range of young people, from toddlers up through to teens. Nido has also addressed local nutritional gaps (iron, calcium, vitamins) while embedding itself in everyday family routines through education-led messaging. All of this has helped Nido stay relevant amid changing expectations around child health, immunity, and wellness.

Future Power Index

172

Source: Kantar BrandZ, USA, Baby Food, 2025

IMPLICATIONS

01

DEEPEN MEANINGFUL CONNECTIONS TO DRIVE GROWTH

Food and beverage brands must deepen their Meaningful connections with consumers to drive growth. Brands should tap into the values people care about, including wellbeing, sustainability, trust, and inclusion. They should also weave themselves into everyday rituals. Authentic storytelling, cultural connection, and advocacy from real people can all help brands feel closer and more instinctively chosen.

02

FIND NEW SPACE BEYOND CURRENT BOUNDARIES

Category headwinds mean that growth may have to come from somewhere new. Health is one such domain, whether through cleaner labels, functional benefits, or nutritional integrity. Indulgence is another, especially when tied to convenient snacking formats. There is also opportunity in premium niches, unusual flavours, and more sustainable packaging. Brands that reformulate proactively, test quickly, and spot emerging micro-segments will have the best chance for success.

HOME CARE

HOME CARE TOP 10:

Brand	Brand Value (US$M)
TIDE	$11,526
ARIEL	$6,537
OMO	$6,386
DOWNY	$6,210
GAIN	$3,191
FAIRY	$2,853
FINISH	$2,182
DAWN	$2,051
CLOROX	$1,997
LYSOL	$1,978

Source: Kantar/Kantar BrandZ (including data from S&P Capital IQ and Euromonitor)

DEFINITION:
Includes brands of products used for cleaning, maintaining, and caring for the home and household items, including laundry and fabric care products (such as detergents, fabric softeners, and laundry additives), dishwashing products, and household cleaning products (such as hard surface, floor, and toilet cleaners).

A WELL-KEPT RANKING/ HOME IS WHERE THE BRANDS ARE

Category Brand Value Year-on-Year Change	N/A
Luxury Top 10 Total Brand Value	$44,911 M

HOME CARE

This year marks the debut of the Kantar BrandZ Global Home Care ranking. Led by Tide, these 10 brands stand atop a fiercely contested field.

In market after market, legacy names now jostle for retail space with niche challengers and premium private labels. Innovation is one way big brands can still win head-to-head. With budgets tight, consumers want multifunctional formulas that do more for their money.

At the same time, major brands can sometimes sound *too* functional in their messaging, ceding emotion to insurgents. That is risky in a category tied to the idea of 'home'.

The category's human side is surfacing in other ways. The past decade saw the rise of a sizeable 'eco' segment. Yet sustainability claims can often skew technical. A fresher idea is to contextualise 'naturalness' within the frame of cleaning as a wellbeing ritual. To that end, fragrance, soothing design cues, and skin-safe ingredients are now key purchase drivers, offering new opportunities for premium.

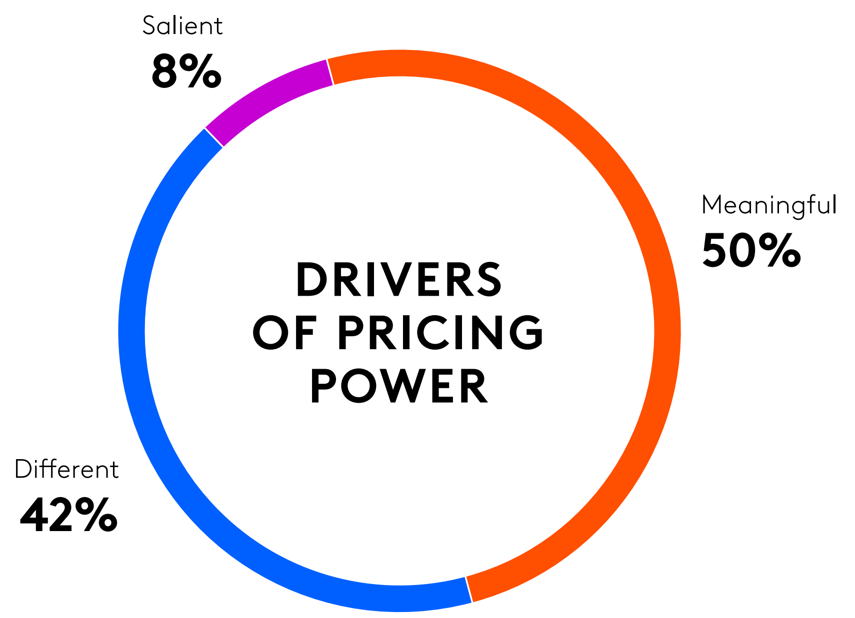
At the other pole sits automation. China has led the way in embracing cleaning robots and connected appliances, prompting leading Chinese laundry brand Blue Moon to revamp its range for smart machines. The next frontier? Greater consumer embrace of autonomous vacuums, mops, and connected washers that don't just use tailored products, but reorder them 'agentically'.

Still, there is plenty of other growth to capture besides. For instance, pet ownership is surging across many emerging markets, creating new opportunities for innovation.

Another opportunity area is marketing. Social platforms and influencer marketing let brands speak to many segments with precision. This allows brands to better address demographic shifts like the rise of single-person households. These days, even legacy brands like Clorox have moved to a social-first strategy, building new communities around cleaning tips and user-generated content.

The most valuable Home Care brands also have strong Meaningful connections supporting higher margins. And 9 out of 10 of the most valuable home care brands have extra Pricing Power.

Home Care brands draw more of their Pricing Power from being Meaningful



Source: Kantar BrandZ database, All 18 Home Care categories, 2024-2025

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Innovating for changing household structures

A convergence of socioeconomic shifts – delayed marriage, declining fertility rates, ageing populations, immigration, rising living costs, housing shortages – is driving growth in both single-person and multigenerational households. As the number of people living alone grows at both the younger and older ends of the age spectrum, it is essential for brands to understand a wide range of distinct needs and preferences. This includes demand for smaller pack sizes, single-use formats, and multi-purpose products, but also different lifestyle priorities.

Younger consumers may seek products that support self-expression and mental wellbeing; while older consumers place greater emphasis on accessibility, ease of use, and safety. At the same time, rising living costs mean singles are increasingly looking for convenient ways to share or split bulk purchases.

In multigenerational households, purchase decisions are increasingly influenced by multiple age groups, prompting brands to develop messaging that can resonate across generations. With very young and elderly people living under the same roof, brands will need to prioritise ease of use, while also considering bundled offerings that support caregiving needs across different life stages.

HOME CARE

BRAND SPOTLIGHT

2026 BRAND VALUE

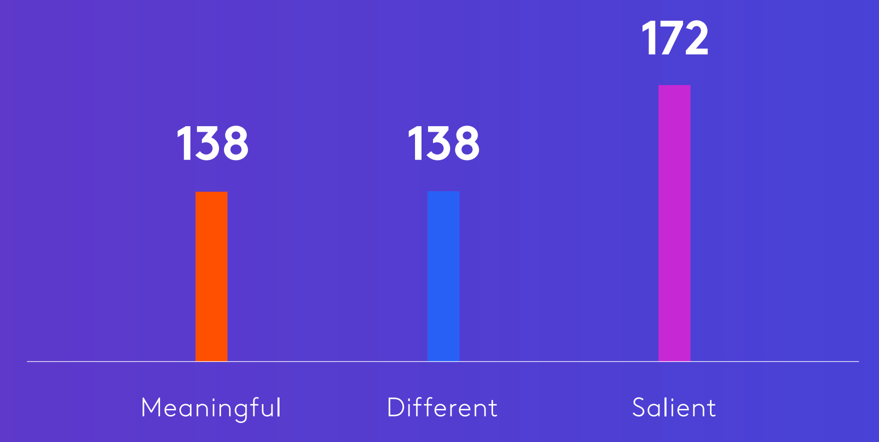
$6,386 M

New

Globally consistent, locally relevant

OMO is Unilever's flagship global laundry brand. While it is sold under different names in different markets – Surf Excel in India, Persil in the UK – it shares one unifying global brand platform: 'Dirt Is Good'. First launched in the 2000s, 'Dirt Is Good' has been a longtime source of Meaningful Difference for the brand, allowing it to combine strong functional credentials with positive emotions. Rather than focusing solely on stain removal, OMO frames itself as an enabler of learning and growth, encouraging parents to embrace play and exploration with confidence. What this looks like in practice varies by market: In India, themes of courage shine through; In the UK, there's an emphasis on outdoor play.

Global brand equity



Omo Brand Strengths

Source: Kantar BrandZ Fabric Care, UK, China, India, Brazil, 2024-2025

BRAND TO WATCH

立白

Fabric care brand **Liby** is now #1 in its class for Demand Power in mainland China – competing well against many global brands thanks to its premium feel, innovation focus, and growing emphasis on sustainability.

Future Power Index

130

Source: Kantar BrandZ, China, Fabric Care, 2025

IMPLICATIONS

01

SHIFT FROM FUNCTION TO EMOTION

Functional performance matters in home care – but on its own, it's rarely enough to build lasting memory structures. Stronger brands connect their products to how people want their homes to feel: cared for, calm, healthy, in order. To drive more sales (and spur more switching), brands should build stories around daily rituals, family, and self-care.

02

INNOVATE FOR MODERN LIFESTYLES

Innovation means more than just new formulas. Rather than focusing on incremental line extensions that add little perceived Difference, innovations should speak to real tensions in our shifting lifestyles (less time, more pets, smaller households, smarter homes, etc.). Clearly signal your brand's solutions to emerging needs. When you do, more growth will likely follow.

LUXURY

LUXURY TOP 10:

Brand	Brand Value (US$M)
HERMÈS	$113,136
LOUIS VUITTON	$87,532
CHANEL	$53,127
GUCCI	$15,217
CARTIER	$14,657
ROLEX	$10,155
DIOR	$10,122
SAINT LAURENT/YSL	$6,034
COACH	$5,923
TIFFANY & CO.	$5,291

Source: Kantar/Kantar BrandZ (including data from S&P Capital IQ and Euromonitor)

DEFINITION:
The Luxury category includes brands that design, craft and market high-end clothing, leather goods, fragrances, accessories, and watches.

A NEW PROPOSITION/ LUXURY BRANDS REFOCUS ON SERVICE AND DISTINCTION

Category Brand Value Year-on-Year Change: **-8%**

Luxury Top 10 Total Brand Value: **$321,194 M**

LUXURY

The Luxury Top 10 declines 8% this year in a difficult period for the category.

Difficult, but also transitional. Notably, the industry has seen a slew of new creative directors named to major houses: Chanel, Gucci, Balenciaga, Hermès Men, Céline, Loewe, Versace… and that's just a partial list! Their brief is differentiation – a return to true 'specialness' as the driver of consumer demand.

There are other ways to grow, of course. This was an industry that used to operate on instinct. Now, though, brand managers regularly use machine learning tools to inform their merchandising, pricing, trendspotting, and influencer strategies. Most of these tools should improve with advanced AI.

But even the best analytics can be misapplied. When every luxury brand is working off the same trend reports and sales trackers, the industry's output risks feeling a little… average. Years of price increases has also created a Trust gap that lingers in the form of lower Future Power. It's hard to get excited about brands if you doubt they're worth the cost.

The solution here is excess Meaningful Difference, or Future Power. Luxury brands can regain momentum by telling stories about specialness and craft – but also by sharing creative visions that are impossible to mark to others' prices. This is an industry where it ultimately pays to set the trends. It's no surprise then, that Hermès has been outperforming its competitors: it has always gone its own way. People don't really expect top brands in other categories to drive culture; it's enough that they associate themselves with resonant events and moments. But luxury is different: its content *is* the culture – or at least it should be.

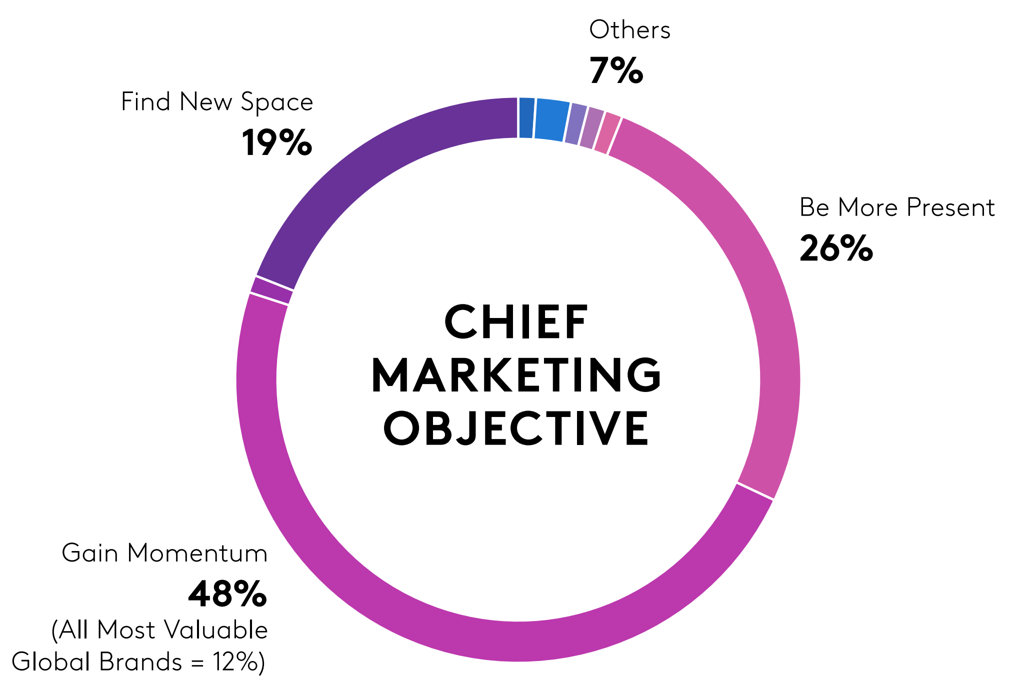
Top brands must also excel at those touchpoints that can't be digitised. Part of what sets Hermès apart is how excellently (knowledgeably, attentively) staffed its big boutiques are. Even buying a lipstick there feels like a personalised experience.

Luxury flagship stores perform a lot of different brand-building functions these days, and that's a good thing. At Dior, they're museums; at Louis Vuitton, they house monogrammed cafés. Still, nothing matters more than making clients feel incredible along the path to purchase.

Fine jewellery and watch brands have long excelled at this kind of high-touch service (shoppers can hardly be allowed to rummage through inventory themselves.) That's one reason why Cartier and Rolex have retained their lustre while the wider luxury category has faltered of late. They also deserve credit for how nimbly they've balanced the 'timely' with the 'timeless.'

With this in mind, the challenge for luxury brands and their marketers is to gain momentum and rebuild meaningful connections with their audiences. Kantar models show that for luxury brands, the ability to generate conversation is 6X more influential in driving demand compared with other categories.

% of Luxury Brand Value within each Objective



Source: Kantar BrandZ, Top 10 Luxury Brands; Most Valuable Global Brands 2026

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Subtle luxury, daily life, regional growth

In the face of global luxury headwinds, the Middle East has emerged as a striking growth outlier, with its luxury spend rising amidst a global pattern of decline. One lever behind this growth is how luxury is woven into the fabric of daily life and the embracing of 'quiet luxury' within this frame. An understated elegance rooted in craftsmanship, authenticity, and meaningful experiences has emerged in the luxury space. It's a testament to how the region's discerning approach not only preserves luxury's allure but also signals where the global luxury landscape is headed.

LUXURY

BRAND SPOTLIGHT

2026 BRAND VALUE

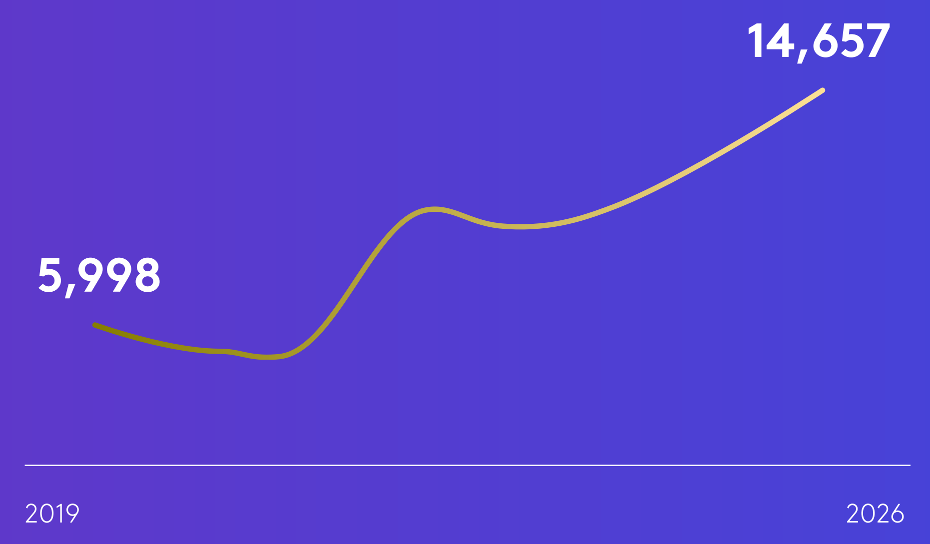
$14,657 M

+18% vs 2025

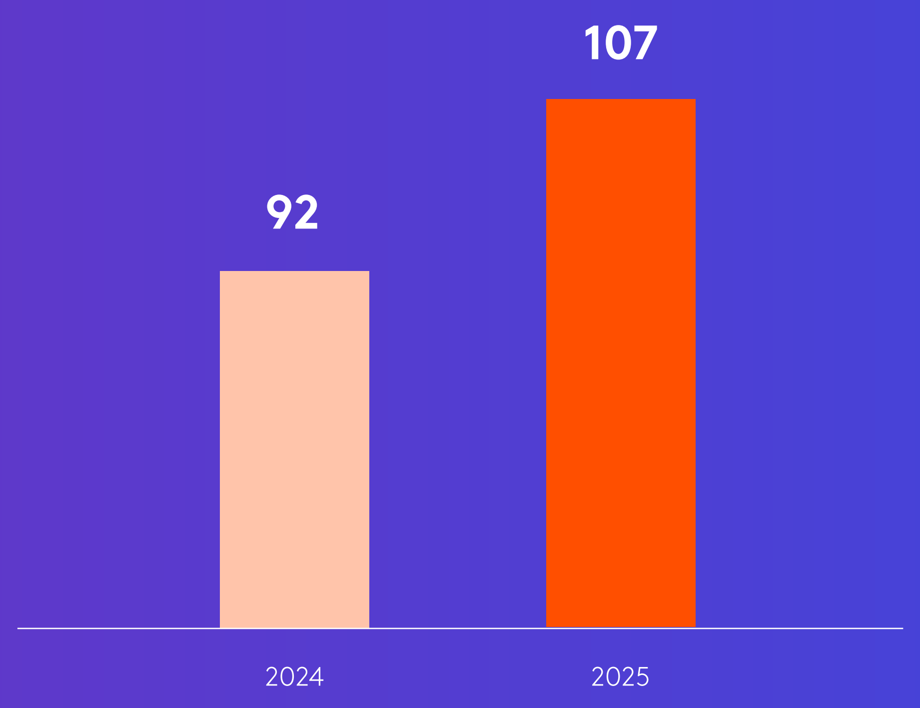
Building Meaningful connections

Founded in 1847, Cartier has chosen consistency and recognisability over rapid reinvention. It has spent the past few years prioritising icons like its Tank watch, positioning them as enduring pieces rather than trend-led statements. To keep its heritage position from growing staid, Carter has also turned to strong cultural integrations. It has expanded its ambassador roster to span film, music, and global youth culture – working with figures such as Rami Malek, Zoë Saldaña, Troye Sivan, Paul Mescal, Jisoo, and Timothée Chalamet. It's a mix that includes many different generations, geographies, and creative worlds, allowing Cartier to feel modern and culturally present while retaining its core luxury codes.

Cartier Brand Value (US$M)



Cartier, Meaningful Index, US



Source: Kantar BrandZ, USA, Luxury Accessories, 2025

BRAND TO WATCH

LOEWE

Spain's oldest luxury fashion house, **Loewe** outperforms on Meaningful connections thanks to its masterful social media presence. There's a braininess to Loewe's blend of craft heritage and surrealist provocations – but at the same time, the brand never forgets to have fun.

Future Power Index

117

Source: Kantar BrandZ, Spain, Luxury Goods, 2025

IMPLICATIONS

01

REIGNITE MOMENTUM THROUGH TRUST

Luxury brands retain strong, recognisable codes of Difference, but many are failing to translate this into Meaningful connections that sustain demand in tough conditions. To fix that, brands should prioritise investment in craft and expertise; doing so gives consumers more reasons to trust that a label will meet their expectations for quality and status.

02

CAPTURE ATTENTION WITH CULTURE

Luxury brands generate social currency through iconic products, credible voice, and culturally fluent storytelling. Rather than chase short-term viral 'pops', marketers should create on a steady drumbeat of consistent cultural narratives – and then amplify these signals coherently across channels, markets, and moments.

MEDIA AND ENTERTAINMENT

MEDIA AND ENTERTAINMENT TOP 10:

Brand	Brand Value (US$M)
GOOGLE[1]	$1,300,738
FACEBOOK	$366,624
INSTAGRAM	$286,158
YOUTUBE	$168,547
NETFLIX	$139,422
WECHAT[2]	$114,214
TIKTOK	$98,436
LINKEDIN	$76,485
DISNEY	$52,968
SPOTIFY	$34,930

1. Google includes Google branded services and products excluding cloud, 2. WeChat and v.qq.com are part of Tencent group; WeChat includes WeChat pay
Source: Kantar/Kantar BrandZ (including data from S&P Capital IQ)

DEFINITION:
The Media and Entertainment category includes traditional media (e.g. TV, newspapers, etc.) as well as social media, search engines, video-sharing services, gaming, video and music streaming services, and leisure facilities.

CAPTURING ATTENTION/ MEDIA AND ENTERTAINMENT BRANDS EXCEL

Category Brand Value Year-on-Year Change: **+40%**

Media and Entertainment Top 10 Total Brand Value: **$2,638,524 M**

MEDIA AND ENTERTAINMENT

The world's top Media and Entertainment brands have grown 40% this year as the category consolidates around its superstars.

For all that today's media and entertainment landscape offers a wealth of choices, it also resembles the 'old days' when consumers stuck to a limited number of available channels.

Except now, it's consumers themselves who are doing the (self-)limiting. Yes, many routinely spend six hours a day or more on entertainment across streaming video, social platforms, gaming, and music (from a recent US study by Deloitte). But they *also* tend to stick to a narrow set of channels and formats within that time frame. Among these, short-form video continues its upward rise, with gains concentrated among a small group of leading platforms.

In most parts of the world, these platforms include YouTube, TikTok, and the Meta brands. In China, where the short-form video format first took off, the leaders are Douyin, Kuaishou, Xiaohongshu, and now WeChat.

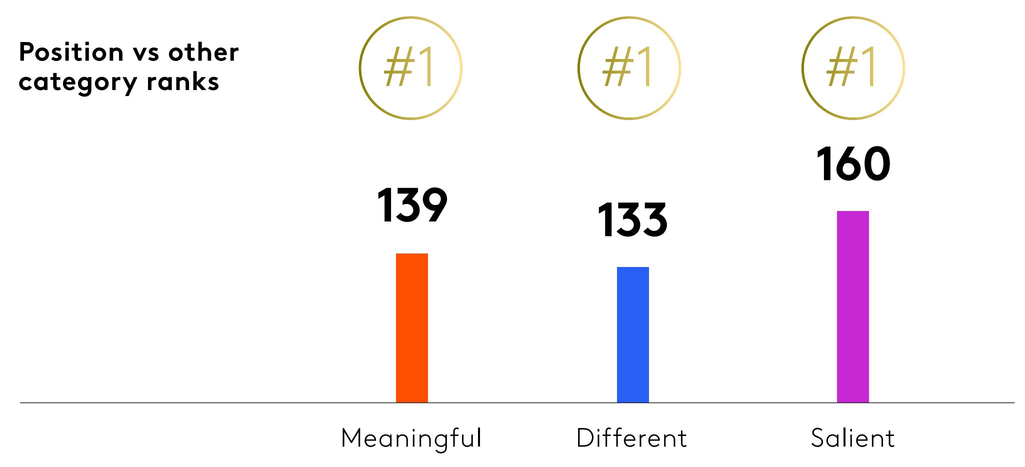
Regardless, this trend toward consolidation has shaped how content is made and surfaced. Brands and publishers today must adapt to platform-native formats designed for speed, volume, and 'shopability' (video is now a point of transaction, not just consumption). On top of it all, viewers' attention has become harder to hold and easier to lose.

Creators sit at the centre of this new attention economy. Individual content creators inspire more loyalty on short-form platforms than most corporate studios or movie stars – and they do so with far less overhead.

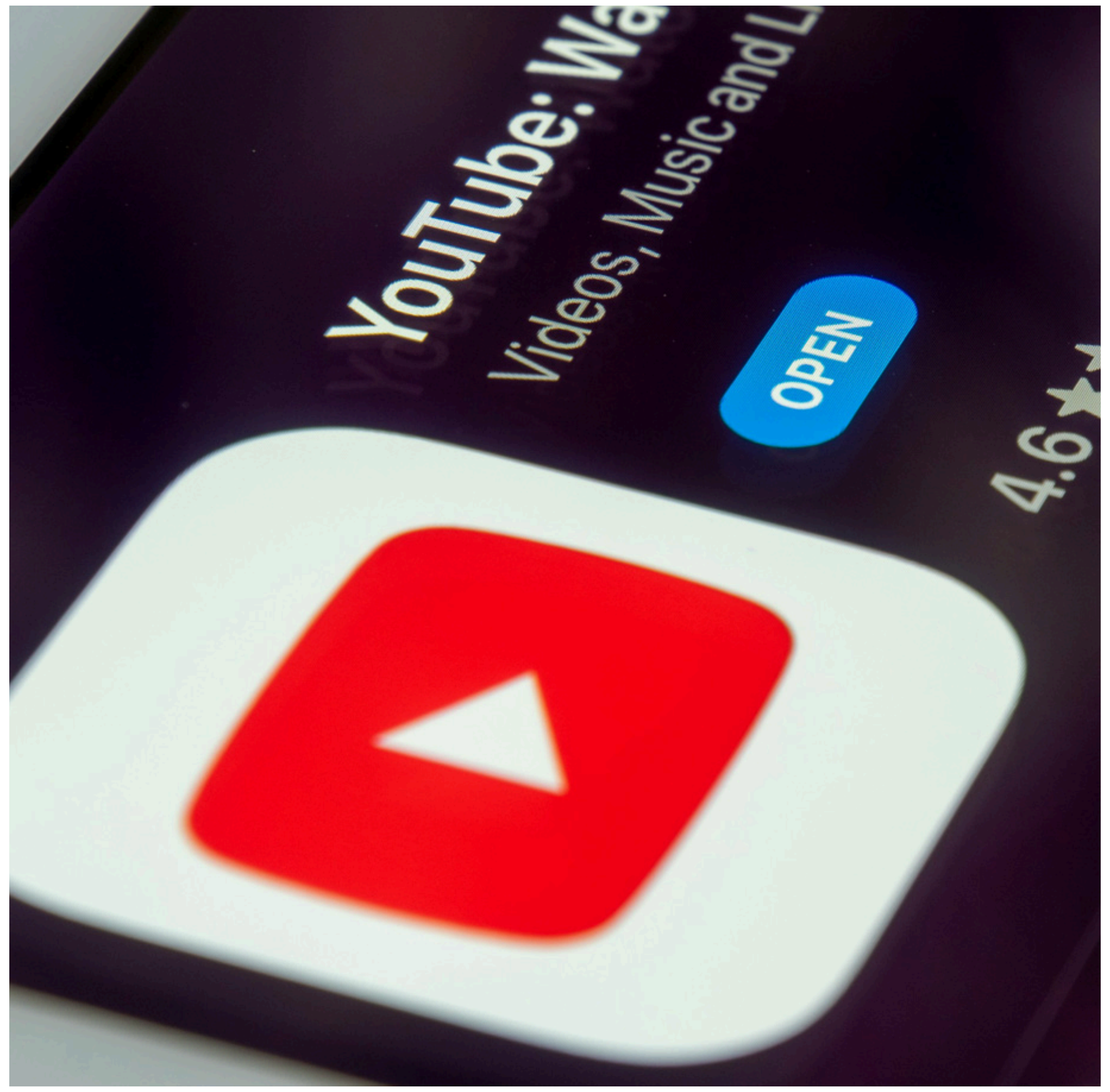
This imbalance has major implications for top brands as they look to build on their dominance by finding new space. For instance, it explains why Netflix signed a multimillion-dollar, *non-exclusive* deal for episodes from YouTube children's host Ms. Rachel. It also portends 'video podcasts' becoming the next big thing in content: it turns out that people will watch their favourite audio hosts sit and talk for hours – even as these same viewers may struggle to make it through a movie.

Creator centricity has brought new risks and rewards for brand advertisers on these platforms. Signing deals with creators for sponsored content can sometimes lift engagement dramatically. But this content can also sometimes fall flat with both viewers *and* the algorithm.

Top 10 Media and Entertainment brands
Average brand equity



Source: Kantar BrandZ, Top 10 Media & Entertainment Brands, 2026



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The era of total TV

The past decade has quietly reshaped TV. As smart TVs became the norm, the distinction between broadcast and streaming all but disappeared for viewers. Today, people simply watch TV. Broadcast still delivers scale, but streaming has become part of everyday behaviour. Kantar Media Reactions 2025 shows that 72% of people say they stream TV and video, compared with 65% for broadcast TV.

Audiences are not just migrating for convenience. They are following quality. Netflix and Disney+ lead globally for preferred content according to Media Reactions, while Amazon Prime's advertising stands out as particularly well received. As streaming platforms mature, their priorities are shifting. Growth is no longer enough. Netflix and Disney+ have introduced advertising and raised prices, and fast platforms like Tubi continue to gain momentum.

For marketers, this evolution brings complexity. Fragmentation makes reach harder to plan, and video investment decisions feel less straightforward than before. Yet this is not a story of replacement. It is one of rebalancing.

A net 26% of marketers globally plan to reduce broadcast TV investment in 2026, while a net 54% expect to increase spend on TV streaming. Investment is spreading across a broader video portfolio. TV brands, whether rooted in broadcast or streaming, now need to think and act as total video players, supporting advertisers in a world where viewers already have.

MEDIA AND ENTERTAINMENT

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AI changed the game – brands change the rules

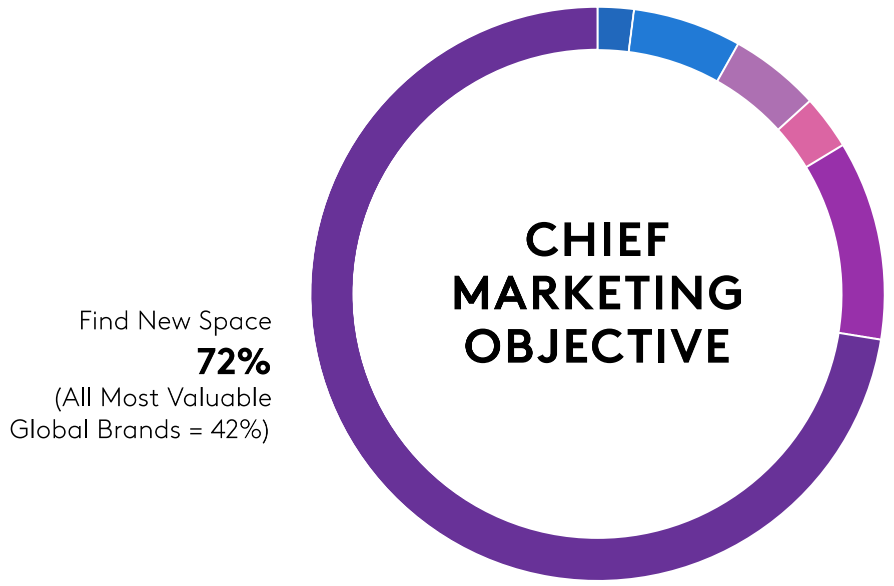
In an AI-shaped world, gaming brands won't thrive by behaving like 'products' anymore. They need to behave like living systems, hence the winners will be the ones that distil signal into human truth. That's why Nintendo's durability comes from designing for shared joy and accessible identity: worlds people can enter together. PlayStation's brand power, by contrast, is reinforced by premium storytelling that turns game launches into cultural moments. In an attention economy, the brands that stay closest to human motivations – belonging, mastery, escapism, status – will create the most difference.

The next frontier isn't more content. It's better decisions – and the courage to say no. Xbox's leadership position will be sustained because the brand pairs ecosystem ambition with a clear stance against flooding the space with 'soulless AI slop'; alongside the decision to push for seamless play across devices. The brands that win will connect culture-sensing and content choices to enterprise outcomes, not just engagement spikes.

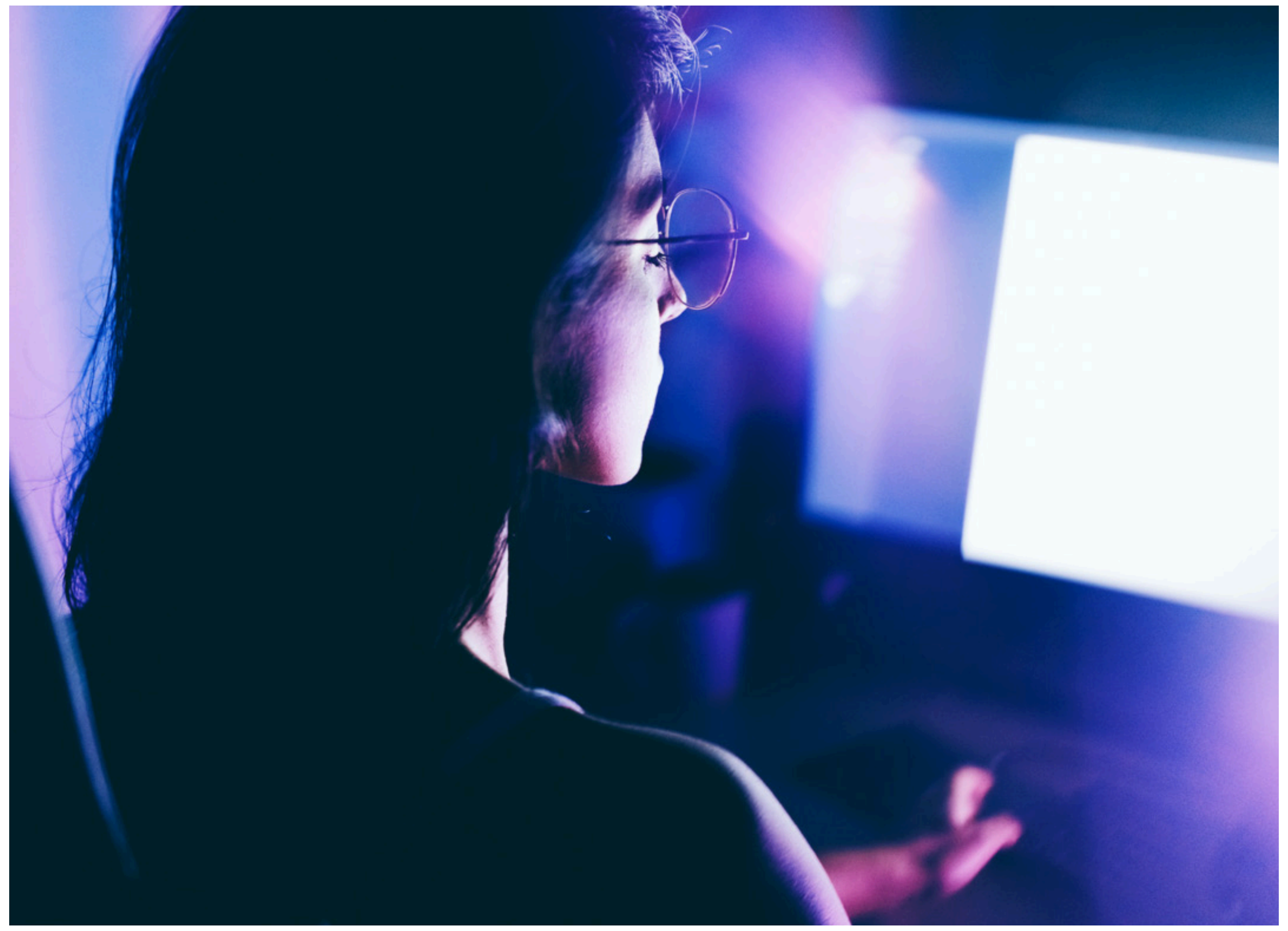
If you're a brand builder in a gaming business, audit your 'brand intelligence loop' by asking:

1. *What signals actually predict fandom and retention?*
2. *Which bets drive measurable brand growth (not just short-term buzz)?*
3. *How do your brand actions ladder up to enterprise value?*

The task ahead: Find New Space
% of Media & Entertainment Brand Value within each Objective



Source: Kantar BrandZ, Top 10 Media & Entertainment Brands; Most Valuable Global Brands 2026



If consumer consolidation is one big reason for the category's success this year, the other is AI. Brands' proprietary, machine learning-led 'discovery engines' have reshaped media creation and consumption. Looking ahead, Google, Meta, TikTok and the Chinese apps have have begun to emphasise generative AI creation tools on their social platforms. The hope is that this will touch off a new boom of user-generated content on their, further boosting their appeal to marketers. Google, Douyin, Tencent, and the Meta brands might not have ChatGPT's first-mover advantage when it comes to advanced AI. But what they do have is a great track record in building tools and products that people truly love to use. So don't count them out in the race to build Meaningfully Different AI-driven experiences and brands.

Still, there are some risks. As synthetic content scales, might it become harder to signal originality and trust? Or has the meaning of these concepts changed for today's consumers? Brands should be on the lookout for leading answers to these questions.

Meanwhile, the big entertainment studios are themselves using generative AI for dubbing, editing, VFX, and early-stage scripting work. Some have also softened their stance towards the world's big AI platforms. Rather than issue blanket legal challenges, they might now choose to work with a selected, exclusive partner.

At the same time, more 'traditional' (long-form) entertainment brands have also gained new, less AI-driven routes to growth. Spotify has added a new Audiobooks+ pricing tier. Universal and Disney are rolling out new theme park extensions. Live TV remains a major audience lure, and ad-supported tiers (AVOD) continue to pay out handsomely for streamers.

And then there's Netflix, which continues to push into new spaces like sports, video podcasts, and short-form content. Its new in-app vertical video feed geared toward younger users – people whose 'first screens' have always been their mobile phones. One thing that's great about short-form video from a brand-building perspective is how it offers rapid, real-time personalisation. (By contrast, it takes longer for Netflix to learn your movie habits, because it takes you longer to watch movies.)

The rules are changing, in other words. Yes, building future momentum still runs through creating 'excess' Meaningfully Different value in the here and now. In the past, this might have meant spending billions on new content in the hope that something hit. These days, brands can use AI tools and intelligence to find new space in more more cost-effective (but still Meaningfully Different) ways.

MEDIA & ENTERTAINMENT

BRAND SPOTLIGHT

Google

2026 BRAND VALUE

$1,300,738 M

+55% vs 2025

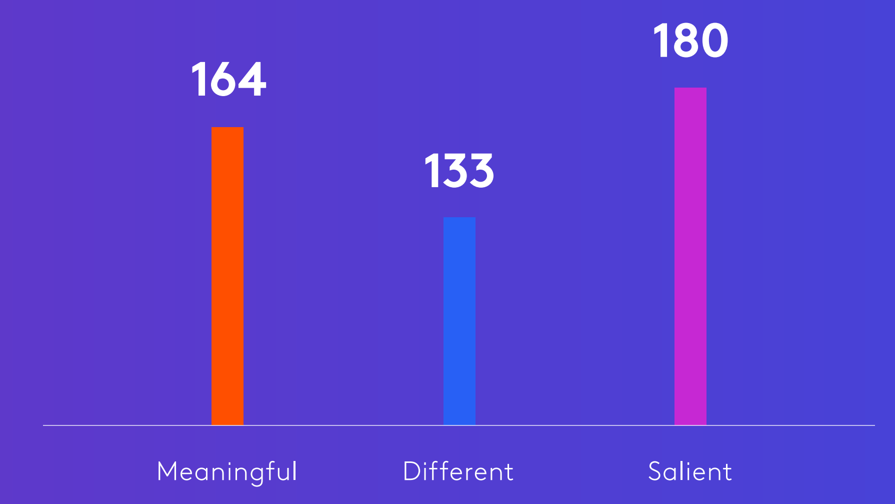
Finding new space for growth with AI

Founded in 1998, Google has built strong connections with users by helping them find relevant, useful information. More recently, Google has found new spaces for growth by evolving from a tool for finding links into an AI-powered platform that helps people make sense of the world's complexity.

AI powered overviews, conversational search, and enhanced discovery enable more nuanced questions and clearer, faster answers. Crucially, rather than replacing Google Search, AI has expanded it, driving more queries and longer sessions (particularly for complex information needs).

By embedding these capabilities directly into its products, Google has reinforced its role as the default gateway to news and knowledge.

Global brand equity



Chief Marketing Objective, US

Source: Kantar BrandZ, Information News and Search, US, 2025

BRAND SPOTLIGHT

TikTok

2026 BRAND VALUE

$98,436 M

+30% vs 2025

A disruptive journey to growth

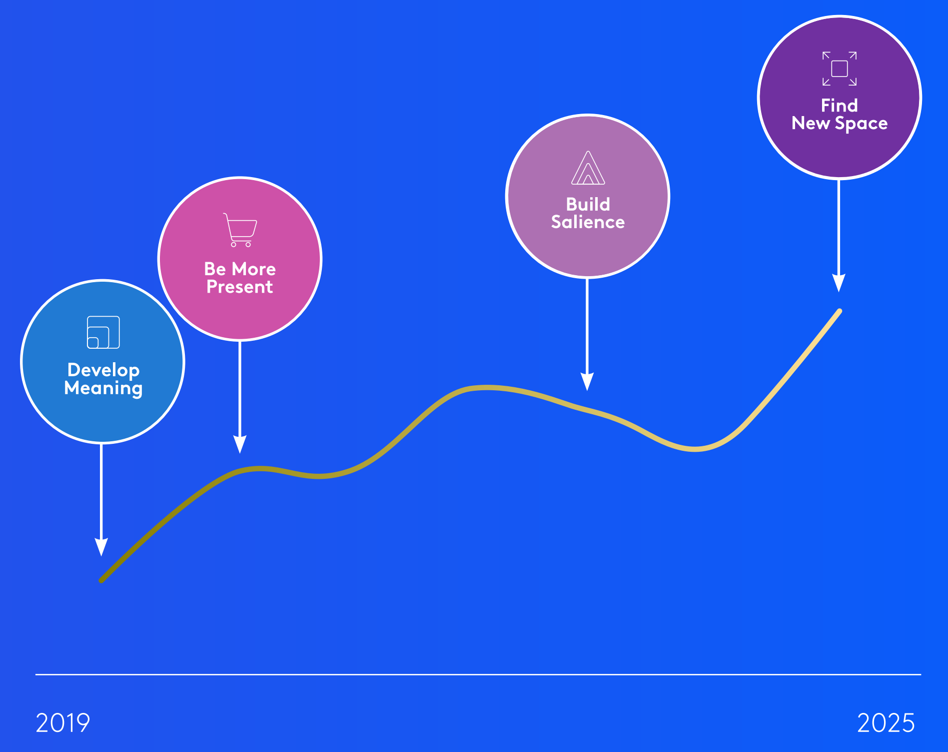
TikTok launched in China in 2016 (as Douyin) and quickly reshaped digital culture through AI-driven short-form video, attracting over a billion users with its hyper-personalised algorithmic feeds.

From the start, the brand has managed to stay ahead in a world of rising competition and contentious regulation. How? By continually strengthening its recommendation engine; introducing creative tools; adding live and interactive formats; and iterating its short-form experience to keep engagement high – even as new and imitative rivals have emerged.

At the same time, the brand has created new growth in commerce through TikTok Shop. This feature integrates product discovery and purchase directly within people's feeds – driving rapid growth via real-time, intelligent product-to-user matching.

TikTok Brand Value (US$M)

Demand Power Index, China



Source: Kantar BrandZ, Douyin, Online Sharing & Networking Platforms, China, 2025

MEDIA & ENTERTAINMENT

BRANDS TO WATCH

今日头条

Founded in 2012, **Toutiao** is an AI-driven news and information platform that personalises content based on user behaviour. Its momentum comes from using AI to surface what people actually read and engage with, delivering highly relevant content that keeps users returning daily.

Future Power Index
120

Source: Kantar BrandZ, Toutiao, China, Information News and Search, 2025

bilibili

Founded in 2009, **Bilibili** is a video entertainment platform built around creator-led content shaped by the niche interests of younger audiences. Its momentum comes from turning entertainment into a shared, participatory experience, with communities forming naturally around creators and formats (anime, music, 'fandoms', and hobbies). This community focus ultimately drives longer viewing time and repeat engagement.

Future Power Index
114

Source: Kantar BrandZ, Bilibili, China, Video Entertainment, 2024

IMPLICATIONS

01

KNOW WHAT MAKES YOU MEANINGFULLY DIFFERENT

Success in media and entertainment involves manoeuvring around lots of big and powerful players. The right signal intelligence is crucial to identifying where your momentum is strongest – and where you can stretch to improve your standing relative to the field. Invest in content, experiences, and marketing that best reinforces your brand's positioning and deepens your connections with users.

02

USE AI TO PERSONALISE EXPERIENCES

AI is reshaping how people discover and enjoy entertainment. Media and entertainment brands should use it to make content easier to find, more relevant, and more intuitive to explore. However as synthetic content becomes common, trust will be a key differentiator. Brands need to be clear about how they use AI and careful to protect the authenticity that audiences value.

PERSONAL CARE

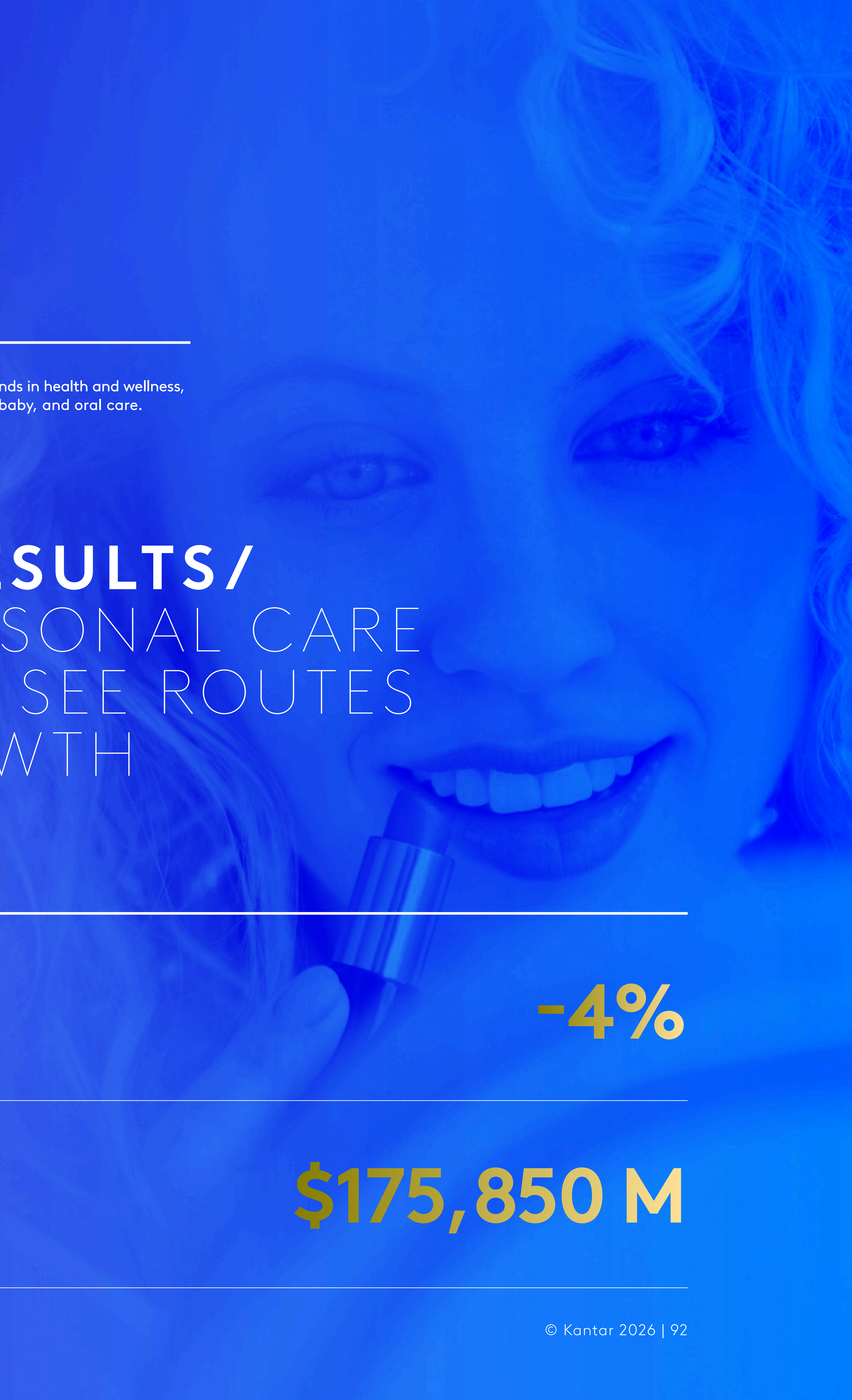
PERSONAL CARE TOP 20:

Brand	Brand Value (US$M)
L'ORÉAL PARIS	$36,854
COLGATE	$18,024
PAMPERS	$16,817
LANCÔME	$15,124
GILLETTE	$14,335
GARNIER	$9,981
DOVE	$7,639
MAYBELLINE	$5,907
NIVEA	$5,764
PANTENE PRO-V	$5,282
ORAL-B	$4,657
ESTÉE LAUDER	$4,607
HUGGIES	$4,504
LA ROCHE-POSAY	$4,412
HEAD & SHOULDERS	$4,254
OLAY	$4,051
SENSODYNE	$3,693
CREST	$3,644
CERAVE	$3,353
CLINIQUE	$2,948

*Personal Care YOY comparision is of Top 15 brands but the total is Top 20

Source: Kantar/Kantar BrandZ (including data from S&P Capital IQ and Euromonitor)

DEFINITION:
The Personal Care category includes brands in health and wellness, beauty and facial, makeup, skin, hair, baby, and oral care.



REAL RESULTS/ TOP PERSONAL CARE BRANDS SEE ROUTES TO GROWTH

Category Brand Value Year-on-Year Change* **-4%**

Personal Care Top 20 Total Brand Value **$175,850 M**

PERSONAL CARE

The Personal Care category expanded from a Top 15 to a Top 20 as leading brands found innovative ways to counter fragmentation and a pullback in consumer spending.

Skincare was the star segment for much of the 2020s. But growth has moderated in this space as consumers economised. This could yield new opportunities for mass and 'masstige' brands – many of which now go toe to toe with the upscale players on efficacy and innovation. But a crowded market complicates the path to outsize growth.

With little room for further price increases, brands at all price tiers are now targeting volume gains and emphasising value for money. What does innovation look like in this context? The answer varies by location and brand. But in general, it involves more 'dimensional' Meaningfulness: more well-rounded intelligence, more holistic benefits. Achieve these, and what generally follows is better Pricing Power – which can defend brands' existing price points against 'dupe' plays just as well as it can enable further price hikes.

In western markets, older consumers have increased their share of category spend. That segment has always had a strong, inherent 'why' when it comes to investing in personal care (they want more agency over the ageing process). And they're also more willing (and able) to pay for 'prestige' offers – provided they see genuine innovation or other clear points of difference.

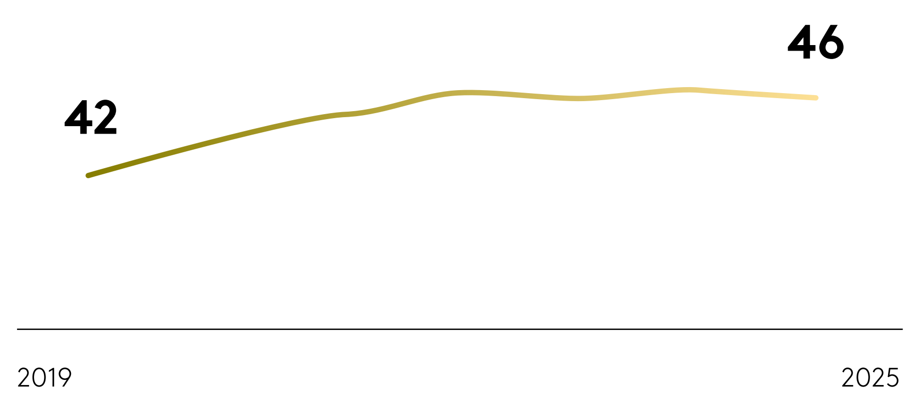
Youth engagement remains critical in key 'rising' markets like India and China, however. These consumers can be quickly won, but just as quickly lost. That's as true in the west as it is in Asia. Demand for influencer and founder-led beauty brands has begun to cool of late – a reminder that while social media hype is an important part of brand building these days, it needs to be accompanied by strong brand equity and innovation for the long run.

L'Oréal Paris's 'Beauty Stimulus' Plan illustrates how this truth can be operationalised. Rather than follow the market, the world's largest personal care brand has recommitted to offer-led growth. The focus is on experiences and benefits that competitors cannot easily replicate, centred around blockbuster – and hype-worthy – innovations. (For the L'Oréal group, these include products like *Gloss Absolu by Kérastase, P-TIOX by SkinCeuticals,* and the *Elvive Growth Booster.)*

Innovation is only one part of the puzzle, of course. Brands of all sizes must also ensure that would-be 'hero products' break through in the marketplace and across the media landscape. Physical retail is still the leading channel for discovery. But ecommerce storefronts and social shopping channels can now perform a similar function online.

Meaningful connections have become increasingly important for Pricing Power

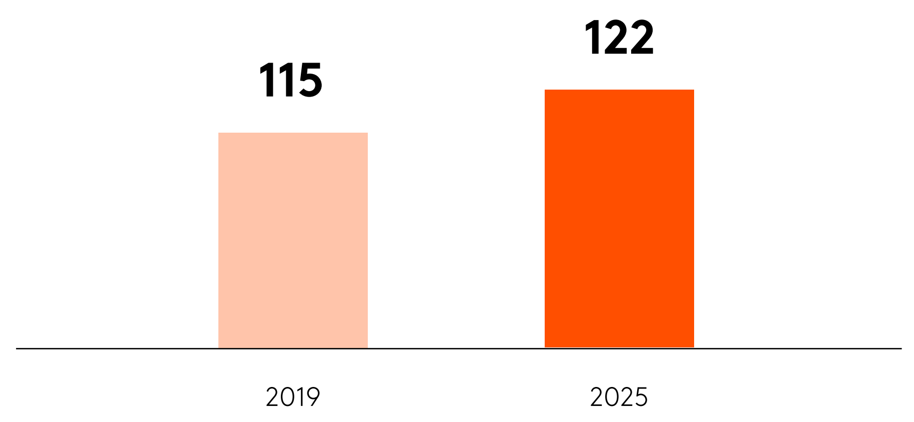
Meaningful contribution to Pricing Power in Personal Care %



Source: Kantar BrandZ, analysis of 206 Personal Care categories, 2019–2025, rolling 2-year trend

Leading brands have stayed ahead by meeting more needs

Personal Care Top 15, average Meaningful Index



Source: Kantar BrandZ, Global Top 15 Personal Care Brands, 2019–2025

Ranjana Gupta
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India's personal care reset

The Indian personal care sector is thriving, fuelled by digitisation and democratisation of expertise. Large brands must stay agile as D2C players and startups such as Minimalist attract consumers eager to challenge legacy products and regimens. The narrative has shifted from nature versus science to proven efficacy, with ingredients being the route to credibility, not just a story.

Online influencers, especially dermatologists and skin experts, now carry more weight than film stars, though authenticity remains crucial as paid promotions can backfire. Men's grooming, while still small, is witnessing more open conversations and experimentation, expanding beyond mere deodorants.

Personal care in India is now more dynamic and challenging than ever. Large brands face scrutiny as platforms empower consumers to question old assumptions, exemplified by Fair & Lovely's struggle post-rebrand. Simultaneously, newer brands must navigate the challenge of scaling up and meeting rapidly evolving consumer demands in a complex market. Success in Indian personal care now demands a long-term strategy grounded in a nuanced, multi-layered understanding of the consumer.

PERSONAL CARE

Digital marketing has become more saturated and expensive of late, however, while influencer impact is weakening. What's rising in their place? Brand-led storytelling, AI-optimised targeting, micro influencer campaigns, and user-generated content. And above all else, better signal intelligence – so that brands can know what's working and what's not (with regards to both short term sales *and* overall brand momentum).

Also working: a more holistic view of Meaning (meeting people's needs), with a focus on wellness and 'good for you' ingredients. According to a recent survey by Kenvue, 88% of people believe personal care positively impacts their health. Cosmeceuticals and 'beauty tech' tools are also doing well, though the latter has attracted more competitors from the consumer tech space like Shark (LED masks) and Dyson (hair stylers).

Fragrance is another success story. Why? Because the segment is emotionally resonant and commercially high-margin, with immediately apparent 'benefits'. But also because there's so much room to differentiate. It's easier to come up with a totally new take on a gardenia scent, say (whether sweet or spicy, sour or creamy) than it is to distinguish your brand's take on tomato-red lipstick from a competitor's. Credit, too, to the wonderful world of #PerfumeTok.

But it also helps that fragrance is an area where behavioural trends are clearly on brands' side. Older generations often settle on a single signature scent. Gen Z consumers are more likely to treat fragrance as a 'wardrobe building' opportunity, assembling collections to suit different moods and occasions.

Akiko Kosukegawa
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AI and science define trust

Japanese consumers tend to highly value personalised care that is rationally optimised based on scientific evidence. Skincare manufacturers such as Kao and Kose offer personalised skincare counselling services utilising AI technology. By combining smartphone-based skin measurement, proprietary skin analysis, and online beauty consultations, they provide an environment where consumers can select skincare products tailored to their needs anytime, anywhere.

In luxury personal care, which is a rapidly growing market in Japan, cutting-edge insights backed by years of dermatological research and proprietary data are prioritised over the technology itself as key elements in creating a 'special experience designed just for you'. Conversely, in mass-market personal care, products that use AI diagnostics and IoT devices to clearly visualise the condition of the skin and body through numerical data and images are gaining popularity.

The ability to easily determine 'the right care for oneself' based on scientific data, rather than relying on subjective feelings or intuition, provides consumers with a sense of reassurance and satisfaction.

Serene Wong
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The dual engine of growth in personal care

The global personal care market is being reshaped by two powerful and seemingly contrasting demographic forces: older consumers who are growing their share of category spend; and younger cohorts (Gen Z and Gen Alpha) who are driving volume, cultural direction, and digital-first growth, especially in emerging markets. Far from being in conflict, these dynamics together create a diversified, resilient engine for brand growth – provided companies understand the distinct motivations, expectations, and value systems that guide each group.

Brands must build a bifocal strategy: protect and premiumise with older consumers through trust, clarity, and proven efficacy. At the same time, they should stay culturally relevant with Gen Z and Alpha via creators, playful innovation, and frictionless digital discovery.

PERSONAL CARE

BRAND SPOTLIGHT

LA ROCHE-POSAY
LABORATOIRE DERMATOLOGIQUE

2026 BRAND VALUE

$4,412 M

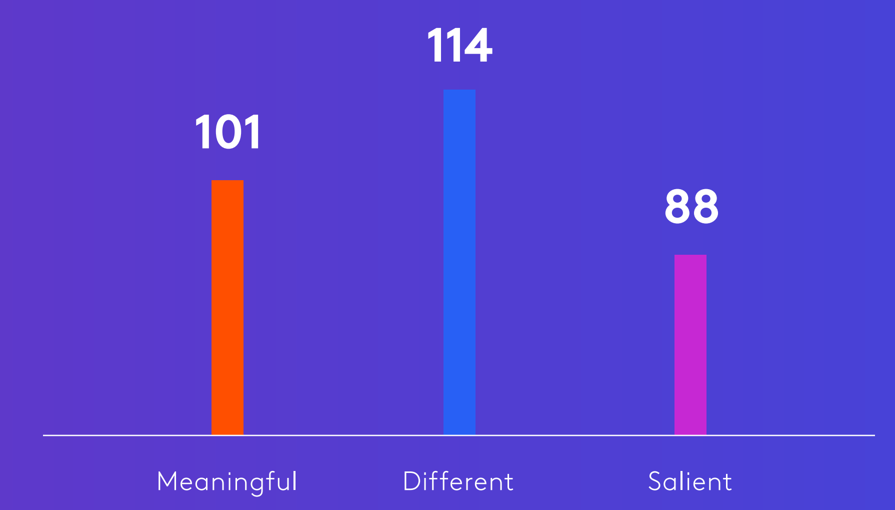
New

Achieving its Chief Marketing Objective

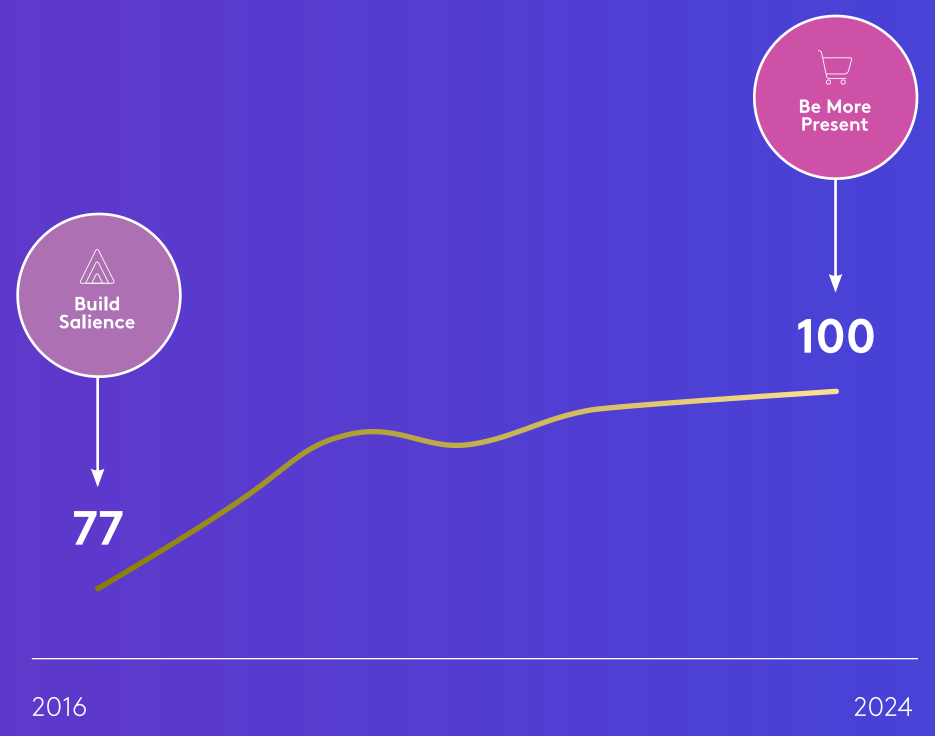
Founded in France in 1975, La Roche-Posay built its brand identity around the dermatological benefits of its namesake thermal spring water. From there, it earned specialist credentials through close collaborations with dermatologists (and other skin and sun-protection experts). In its home market, this specialist heritage has driven strong Meaningful Difference for La Roche-Posay: the brand is seen as one of the best in its field, with trusted expertise in treating concerns such as acne, sensitivity, and sun damage.

From there, La Roche-Posay has worked to build Salience through purposeful activities like its well-known melanoma awareness campaigns. More than just a slogan, these efforts include free skin-check pop-ups, emotionally led campaigns around the impact of skin conditions, and strong pharmacy partnerships across France. The result? Steadily building Salience achieved by linking La Roche-Posay to real-world skin-health – and better outcomes.

Global brand equity



Salient Index, France



Source: Kantar BrandZ, Most Valuable Global Brands, global data, 2026; France, Female Beauty & Skincare, 2016–2024

BRAND SPOTLIGHT

SENSODYNE

2026 BRAND VALUE

$3,693 M

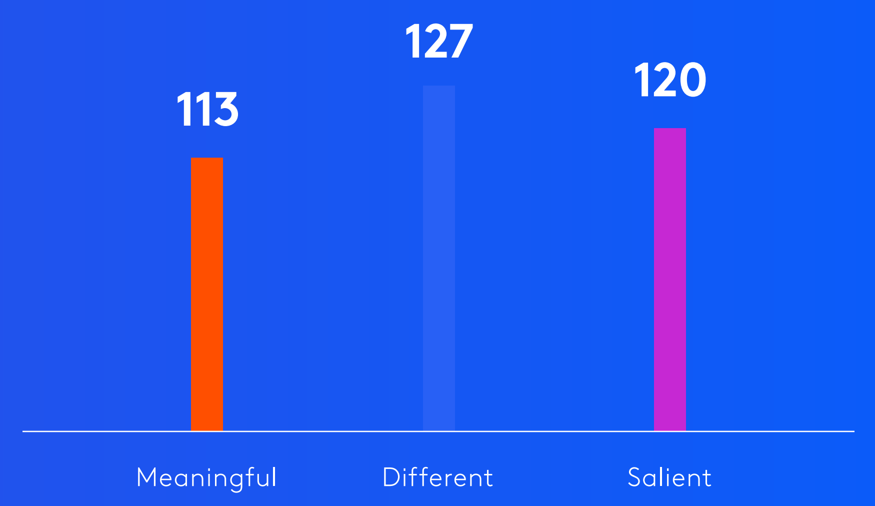
New

Meeting more needs through innovation

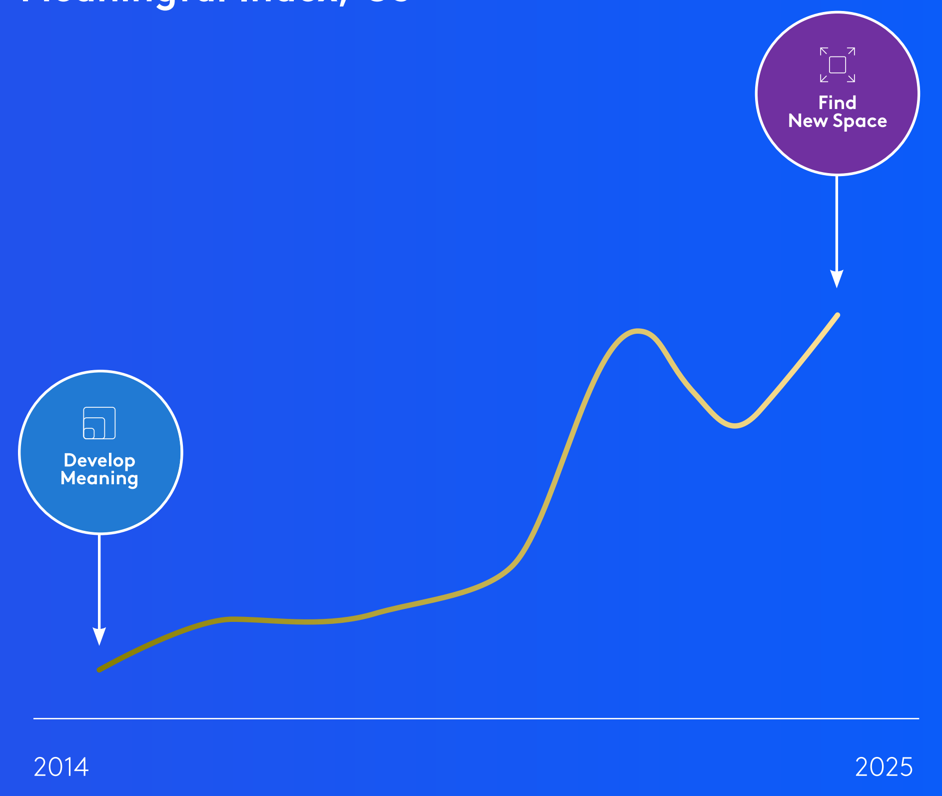
Sensodyne was founded in 1961 in the US as a desensitising toothpaste. In recent years, the brand has reframed itself as a toothpaste for protection and prevention, rather than for episodic symptom relief. This shift has been reinforced by innovations such as whitening for sensitive teeth, which have removed the trade off between comfort and cosmetic results *without* diluting the brand's sensitivity credentials. Being the #1 dentist-recommended brand for sensitive teeth acts as reassurance at scale.

The result is greater relevance, particularly in the US and India, with the brand recently adding 15 million new consumers in India alone. Looking ahead, growth can be expected, given the brand's high Future Power globally.

Global brand equity



Meaningful Index, US



Source: Kantar BrandZ, Most Valuable Global Brands, global data, 2026; USA, Oral Care, 2014–2025

PERSONAL CARE

BRANDS TO WATCH

GRANADO
RIO DE JANEIRO

Founded in 1870, **Granado** stays relevant through frequent product launches and immersive retail experiences, both in its flagship stores and through frequent cultural pop-ups. In addition to expanding across its home market of Brazil, Granado has been making inroads in Europe and the US.

Future Power Index
146

Source: Kantar BrandZ , Brazil, Personal Wash, 2024

Avène

Avène has evolved from an occasional treatment brand (for conditions such as eczema) into an everyday skin-health staple. While retaining its clinical foundations, heritage sourcing, and strong distribution in French pharmacies, Avène has expanded into daily barrier repair and preventative care through innovative new formulas. It is seen as a trusted, specialist brand that works better than others – earning it strong momentum in France.

Future Power Index
144

Source: Kantar BrandZ , France, Female Skincare & Beauty, 2024

IMPLICATIONS

01

DIMENSIONALISE YOUR MEANINGFUL CONNECTIONS

In a fragmented category with limited pricing headroom, growth depends on proving value beyond functional performance. Consumers are looking for brands that blend efficacy with emotional resonance, everyday relevance, and clear value for money. Personal care brands need to create experiences, stories, and rituals that embed themselves into people's routines.

02

INNOVATE TO MEET REAL NEEDS

Personal care brands can drive relevance by investing in human-led innovation that solves real needs. By grounding innovation in the routines, pressures, and wellbeing priorities of consumers, brands create solutions that feel genuinely useful and emotionally resonant. This keeps them distinctive in a saturated market and strengthens both Meaning and long-term relevance.

RETAIL

RETAIL TOP 20:

Brand	Brand Value (US$M)
AMAZON[1]	$396,151
WALMART	$176,706
COSTCO	$114,288
THE HOME DEPOT	$87,634
TMALL[2]	$36,012
LOWE'S	$30,094
ALDI	$27,702
MERCADO LIBRE[1]	$27,277
IKEA	$25,015
TAOBAO[2]	$24,199
SAM'S CLUB	$23,557
LIDL	$21,000
PINDUODUO	$19,616
TJ MAXX	$17,133
EBAY	$15,707
SHOPEE	$13,005
WHOLE FOODS	$12,508
TARGET	$11,384
WOOLWORTHS	$10,674
TESCO	$9,726

1. Amazon and Mercado Libre include their retail business only, 2. Tmall and Taobao are part of Alibaba group
Source: Kantar/Kantar BrandZ (including data from S&P Capital IQ and Euromonitor)

DEFINITION:
The Retail category includes physical and digital distribution channels in grocery and department stores and specialists in drug, electrical, DIY, and home furnishings.

ADD TO CART/ RETAIL BRANDS WIN WITH MEDIA, AI, AND VALUE

Category Brand Value Year-on-Year Change: **+18%**

Retail Top 20 Total Brand Value: **$1,099,388 M**

RETAIL

It's been a positive year overall for the Retail category, as its top brands grow 18%.

Category leader Amazon remains far ahead of the field, and has risen 17% year on year. Like many leading retail brands, it has benefitted from two big sector shifts.

The first is advanced AI's move from pilot to mainstream. Last year, Amazon's Rufus assistant boosted conversion by 60%. Meanwhile, Walmart (up 48% this year) invested heavily in predictive analytics for inventory management and personalised deals – as did rising South American giant Mercado Libre, among other players. Lowe's now has AI-powered 'shoppable' design tools to aid pros and retail consumers alike.

A second, closely related trend is the rise of retail media networks (RMNs). Retailers continue to monetise these advertising solutions at scale with the help of AI engines; as a group, RMNs are now on track to surpass TV ads in total spend by 2030 (if not sooner).

Advertisers see a lot of upside for RMNs as these networks' targeting tools grow even more refined. But brands are also looking hard at which RMN partners can give them the best return on investment. The greatest spoils will ultimately go to those RMNs that combine proven results with superior experience – think innovative analytics, clear pricing, and creative flexibility.

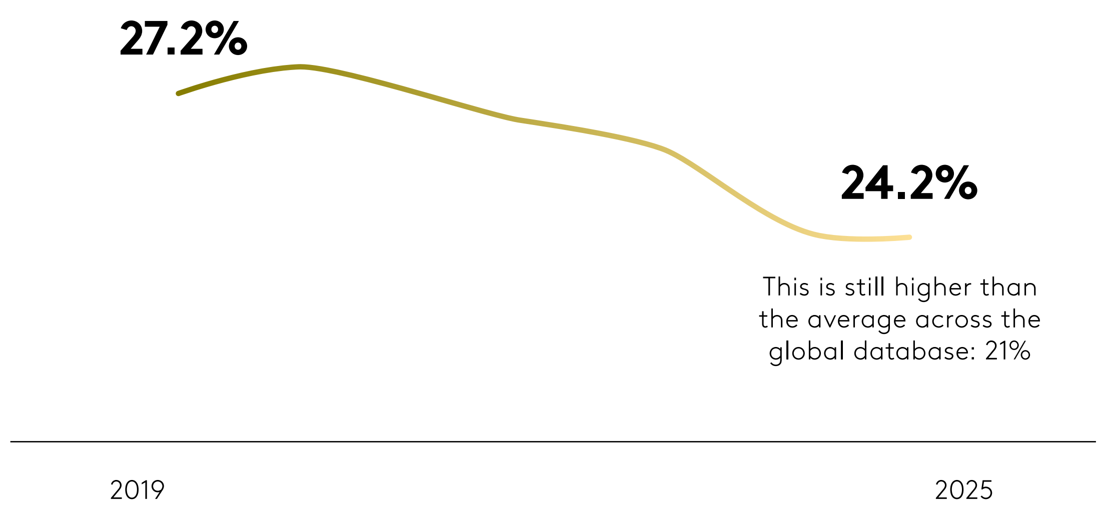
The likely end point of all this disruption is even more convergence between retail, advertising, and content ecosystems. China is currently furthest along on this path. Yes, deflationary pressures have weighed on some Chinese retail brands (while boosting a new crop of discount retail chains). Even so, social commerce and live retail are clear bright spots – to the benefit of brands like Taobao and Tmall. The lesson here for retail brands is that culture matters. Meaning is about more than just functionality these days – consumers are also looking for engaging, entertaining, and communal experiences.

This is evident in China's domestic market, where Douyin's integrations with Taobao and Tmall have generated meaningful revenue for both platforms. These brands are also plenty active on their own – Tmall's owner Alibaba continues to build out Alimama as a central RMN tool, while Douyin has TikTok Shop's engaged overseas audience to offset tariff pressures (and the spinoff of TikTok's US operations).

Still, with greater convergence comes the risk of weaker Difference. This holds true for retail brands worldwide: it's getting harder to stand out. Brands can run ahead of this by finding new spaces that foreground novel forms of value.

Value is this year's other big story. It's now become less 'functionally' defined. Free shipping, free returns, and instant delivery once felt like untouchable perks of 21st century omnichannel retail. But thanks to margin pressure and sustainability concerns, retailers have gone back to charging for these services.

It's getting harder for brands to stand out
% of Retail brands with strong Difference



Source: Kantar BrandZ database

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AI is redefining value in Australian retail

Australia's grocery category is under growing pressure as value-led and digital-first players reshape expectations. Kantar BrandZ data shows Aldi increasing Demand Power by more than 2% between 2022 and 2025, supported by its highly Different positioning and partnerships that extend convenience. Amazon's continued expansion into grocery, including fresh delivery through Harris Farm, is further raising the bar for the incumbents.

In response, grocery market leaders are using AI to deliver more relevant and rewarding experiences. Coles' Flybuys programme delivers personalised weekly recommendations to over four million members, while Woolworths' AI-powered Olive chatbot is evolving into a more service-led touchpoint.

This shift isn't limited to grocery. Specsavers has introduced AI-powered, virtual try-on tools, making online shopping easier and helping reduce returns. Furniture brand Koala uses an in-house AI concierge to give shoppers real-time, personalised answers about products, stock, and delivery.

In beauty, MECCA launched Miss MECCA, an AI chatbot to instantly help customers with product advice, orders, and beauty questions. These examples show how AI is enhancing the retail experience and adding real value in an increasingly competitive marketplace.

RETAIL

Shoppers are beginning to accept this change, even if they don't necessarily love it. What they are less willing to accept are those supposed 'necessary frictions' that brands once justified as the 'price' of extraordinary affordability (such as out-of-the-way locations, too-limited assortments, and bare-bones digital experiences).

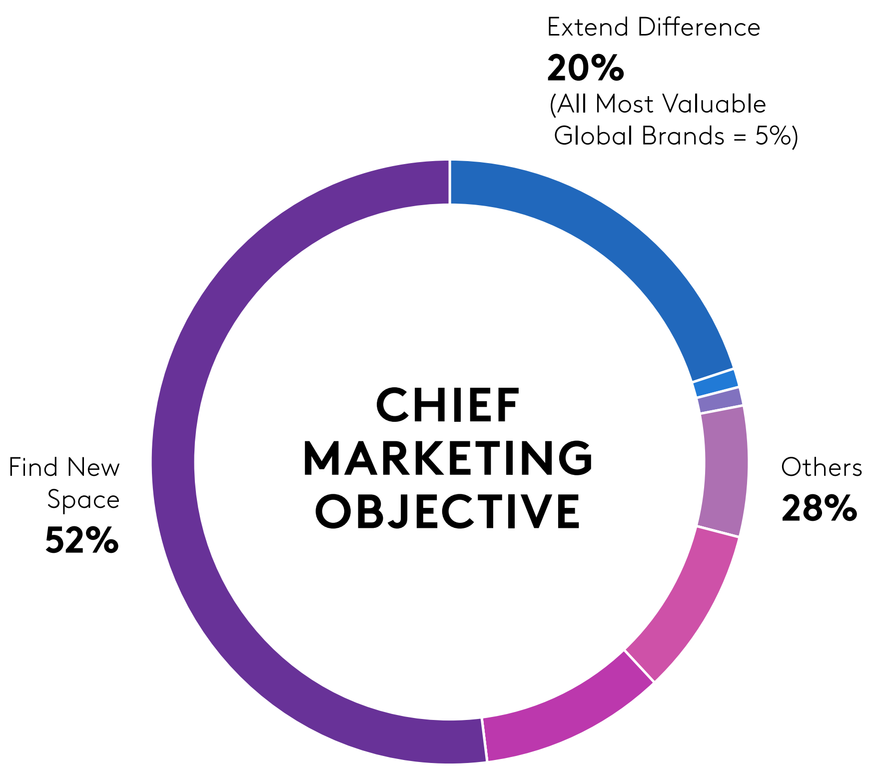
There's a better way for brands to support their margins: Difference. Because even as BrandZ data shows retail brands are struggling to stand out. Difference remains critical to support Pricing Power.

Ease and value now have to move in tandem. And they have to connect to genuine Difference.

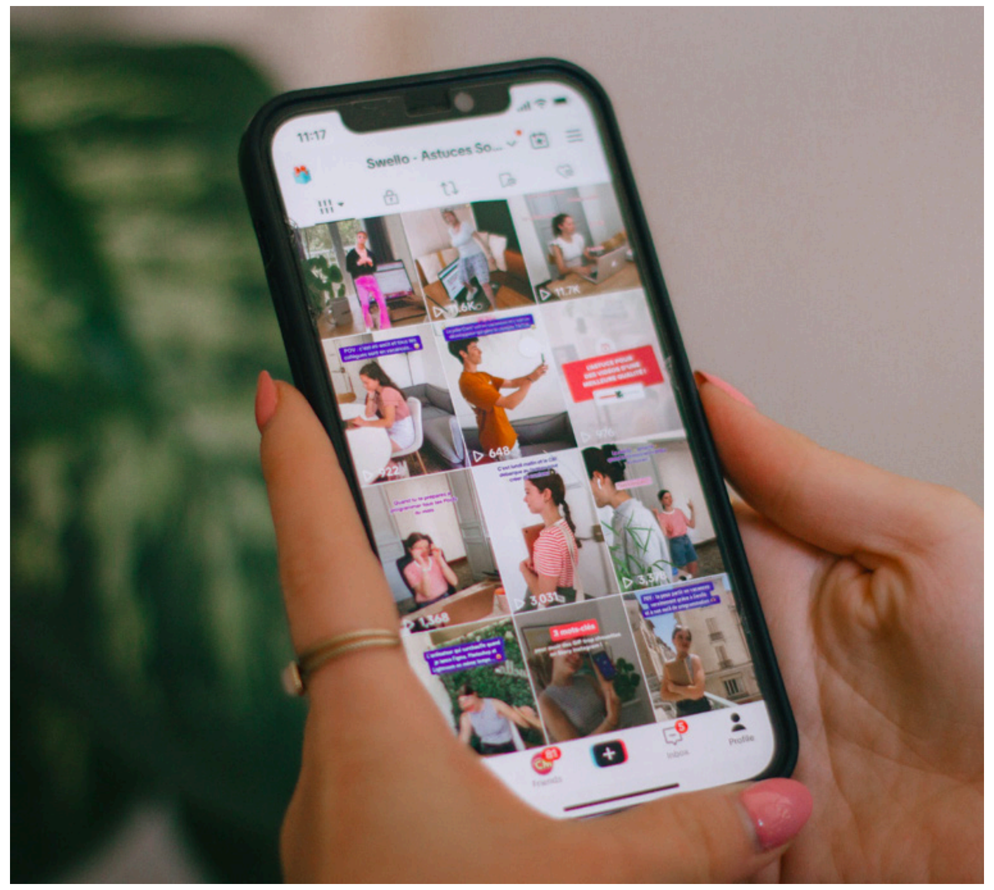
A final note on advertising: it's become important to communicate not just *with* AI tools, but also *for* AI systems. To win placement among AI-curated shopping recommendations, brands need to audit how they appear consistently across a wider range of content sources, from Wikipedia pages to trade publications. They also need to recruit the right mix of influencers and inspire more user-generated content (though these would still be must-dos even without the rise of AI agents.)

Ultimately, retailers looking to build on this year's success will need to take a holistic approach. While some retail brands need to strengthen their Difference, many are also well positioned to find new space, which means meeting needs in adjacent categories and finding their place in new consumer ecosystems.

% of Retail Brand Value within each Objective



Kantar BrandZ, Top 20 Retail Brands; Most Valuable Global Brands 2026



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Private label reflects consumer trust

Social trust varies widely around the word, and it's a key variable to consumers increasing their purchases of private-label products. Regular surveys reveal that individuals and families that place less trust in government, banking, or personal safety are less likely to buy private label over national brands. These people are also less likely to 'recover' from buying poor-quality private labels.

A global map of private-label penetration has long shown that most of Europe and Canada buys private label. In large part, this is due to consistent investments in well-defined tiering of private-label products by key retailers such as Carrefour, Aldi, Tesco, Loblaws, and Sobeys. Their investment of brand strength supports private-label sales, but only for populations with high social trust.

It's clear that even the strongest of branded retailers cannot simply mirror their European strategies elsewhere. Private labels in lower-income countries may be addressed as a daily need rather than an occasion, so understanding that dynamic is vital. Also, paying extra for the assurance of national brands is sensible to those that cannot afford to lose even small sums on potentially poor choices. Consistent communication around the quality of the retailer's brand, then, is critical to private-label success.

RETAIL

BRAND SPOTLIGHT

Walmart

2026 BRAND VALUE

$176,706 M

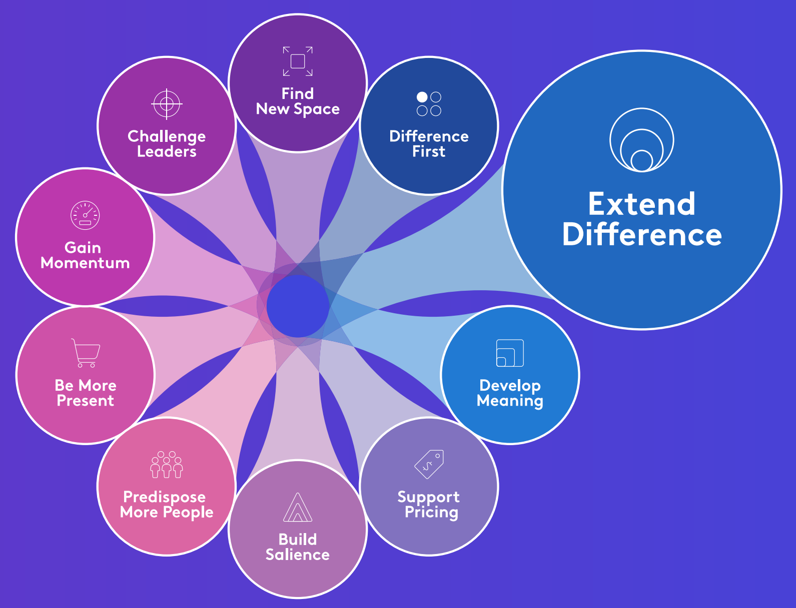
+48% vs 2025

Improved Difference to support 'Great Value' positioning

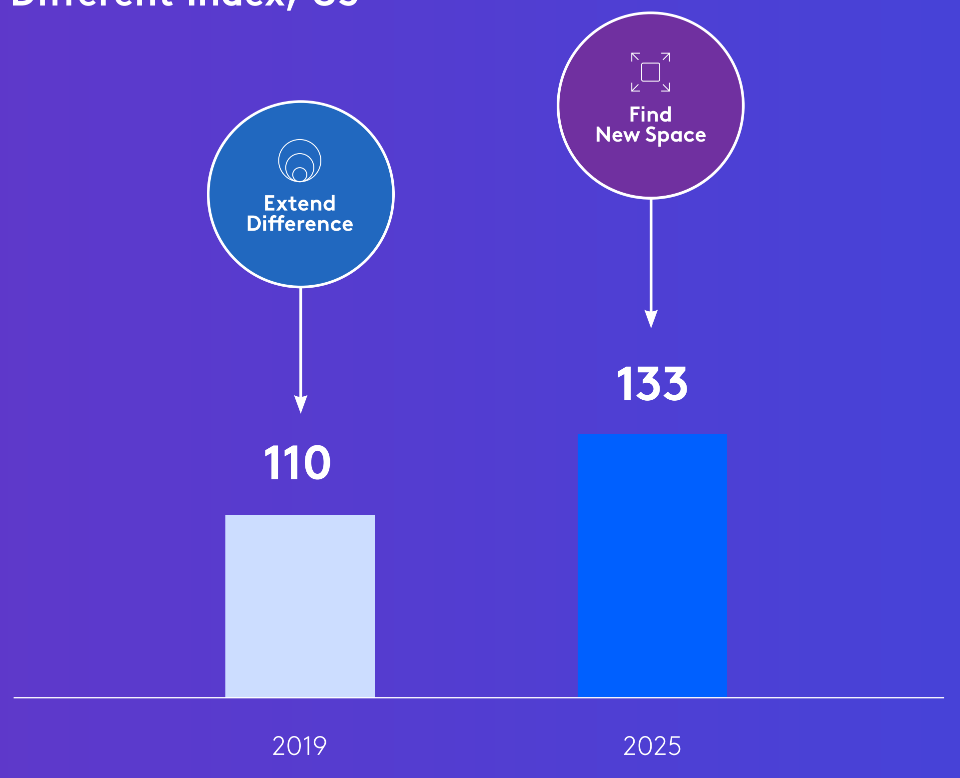
Walmart became one of the fastest-rising brands of 2026 by scaling its omnichannel approach, retail media, and membership offerings to new heights. It had long been a highly Meaningful brand – but until recently, it had been leaving Difference on the table. Over the last year, Walmart has fixed this by reframing what value looks like. Rather than competing on price alone, Walmart has proven it can compete against the field on speed, access, experience.

How? By speeding up fulfilment (including same-day deliveries and curbside pickup) with the help of AI that more precisely forecasts inventory and demand. Diversification into health clinics and financial services has also helped. So too has beefing up Walmart's private-label brands. And then, to wrap it all together, Walmart's marketing has shifted toward more inclusive, human storytelling – with creative that highlights all the varied ways that Walmart shows up daily in people's lives. The result is a brand that fully justifies its 'Great Value' positioning.

Chief Marketing Objective



Different Index, US



Source: Kantar BrandZ, US Grocery Retailers

BRAND SPOTLIGHT

LIDL

2026 BRAND VALUE

$21,000 M

+36% vs 2025

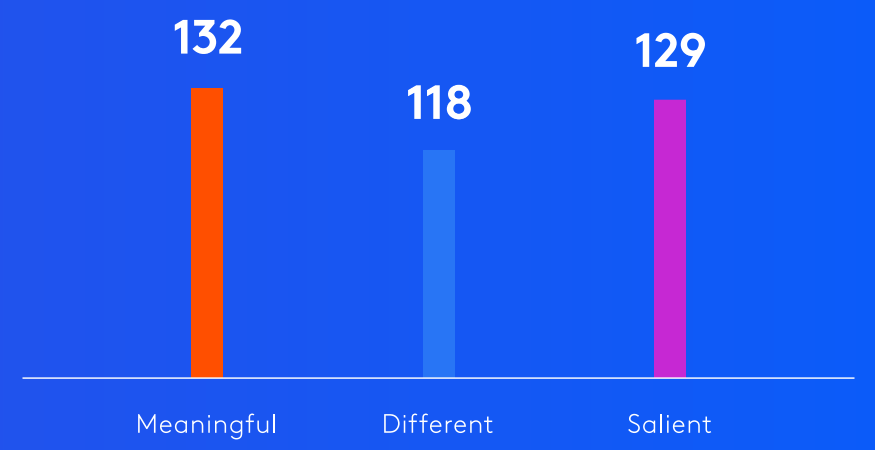
A Meaningful, disruptive brand

With strong consumer perceptions across Europe, grocery and home goods retailer Lidl is perceived to be a disruptive player – one that's changing the rules of value brand building and shopper behaviour.

Its award-winning private labels, strong fresh credentials, and premium seasonal ranges have decoupled price from perceived quality. It's a brand that strikes people as worth more than it costs (Lidl's relentless cost discipline also has the benefit of forcing incumbents into more defensive pricing strategies). Meanwhile, special buys and seasonal drops make for interesting discovery moments year-round, rewarding it with repeat visits.

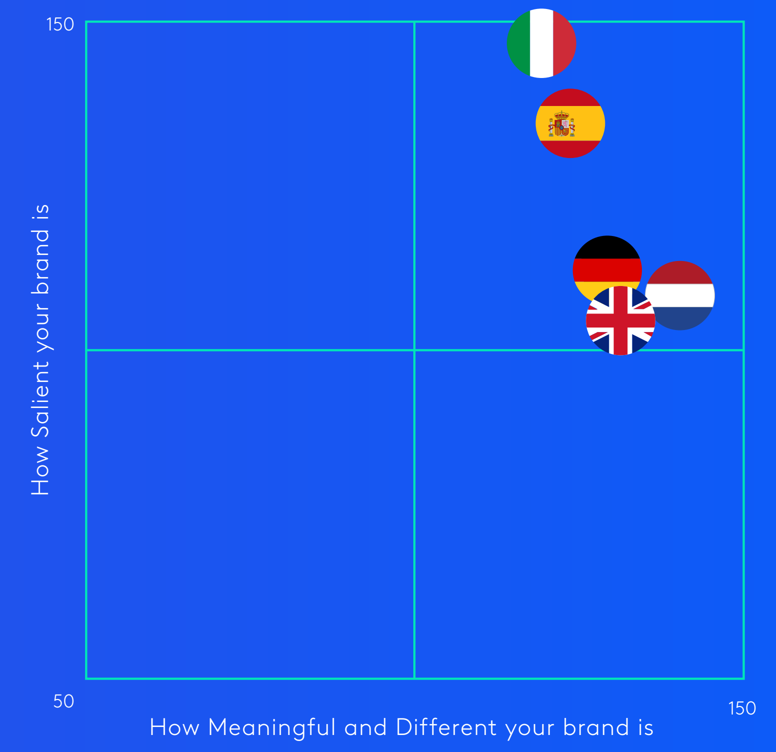
In 2025, Lidl rolled out its first unified brand campaign across all 31 European markets under the platform 'Lidl. More to Value'. By doing so, the brand has repositioned itself as offering more than just a rational, low-cost switching option.

Global brand equity



Source: Kantar BrandZ, Most Valuable Global Brands, global data, 2026

Brand equity across markets



Source: Kantar BrandZ, Grocery Retailers, 2025

RETAIL

BRANDS TO WATCH

LOCAL CONVENIENCE

Local corner shops and convenience stores continue to build strong connections with communities. People see them as more convenient and trustworthy than other retailers. They're familiar, dependable, personal, and they maintain a constant neighbourhood presence – all attributes that consumers appreciate in times of economic and political uncertainty.

Future Power Index

137

Kantar BrandZ, Other Local, Grocery Retailers, Average across 11 markets, 2025

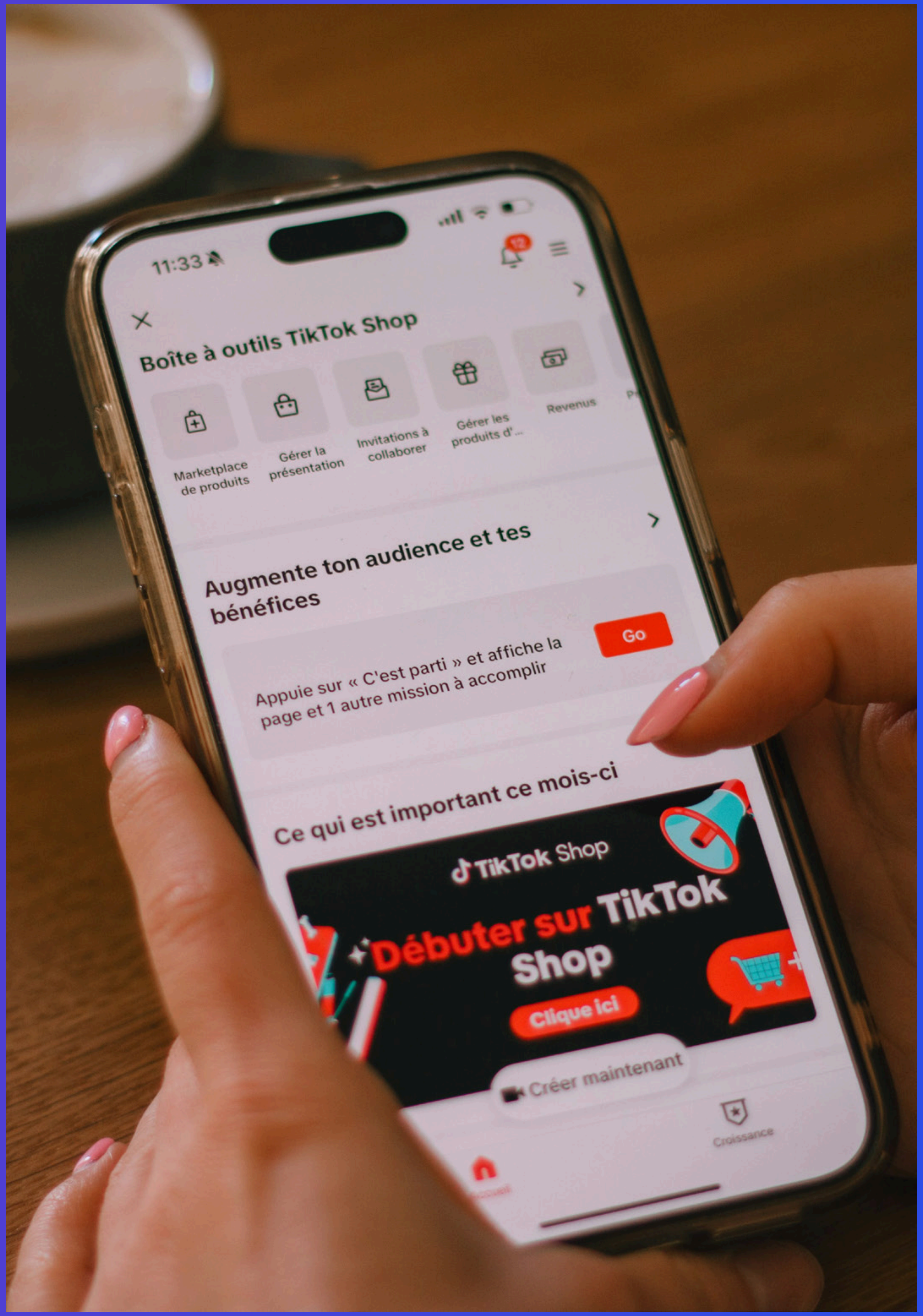
TikTok

TikTok Shop is gaining traction with consumers because it blends entertainment, discovery, and shopping into a frictionless experience. Creator-led content builds trust and social proof. Meanwhile, a seamless path from discovery to purchase boosts conversion compared with traditional ecommerce journeys.

Future Power Index

120

Kantar BrandZ, TikTok Shop, SEA average, 2024 -2025



IMPLICATIONS

01

REDEFINE VALUE THROUGH DIFFERENCE

Retail growth is being driven by brands with a new take on value. Yes, price still matters, but so do speed, access, relevance, and experience. Your task is to decide which of these levers can support your brand's differentiated offer, justify its margins, and make its value proposition harder to copy. To do so, you'll need excellent intelligence.

02

EARN RELEVANCE THROUGH CULTURE

Meaning in retail is recentring around relevance that feels local, cultural, and human. From trusted neighbourhood retailers to creator-led storefronts, brands that feel embedded in people's lives are picking up momentum. Marketers should invest in community connection and emotionally resonant experiences, and then amplify these moments to a wider audience.

TELECOM PROVIDERS

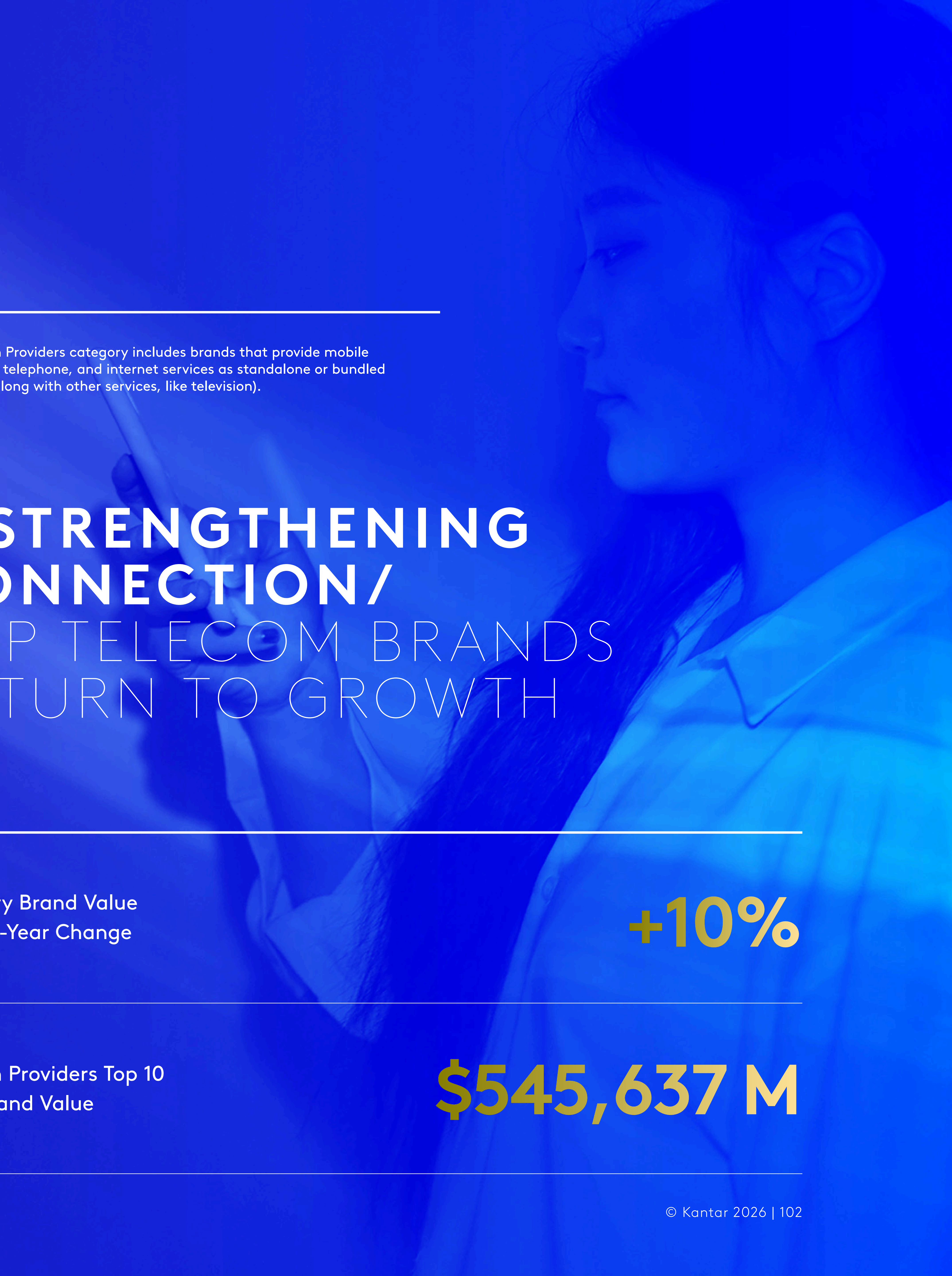
TELECOM PROVIDERS TOP 10:

Brand	Brand Value (US$M)
TELEKOM/T-MOBILE	$124,636
AT&T	$107,032
VERIZON	$90,494
CHINA MOBILE	$50,315
AIRTEL	$47,628
SPECTRUM	$34,904
XFINITY	$29,580
ORANGE	$21,822
VODAFONE	$20,141
NTT	$19,086

Source: Kantar/Kantar BrandZ (including data from S&P Capital IQ)

DEFINITION:
The Telecom Providers category includes brands that provide mobile or fixed-line telephone, and internet services as standalone or bundled packages (along with other services, like television).

A STRENGTHENING CONNECTION/ TOP TELECOM BRANDS RETURN TO GROWTH



Category Brand Value Year-on-Year Change **+10%**

Telecom Providers Top 10 Total Brand Value **$545,637 M**

TELECOM PROVIDERS

The total value of the world's top Telecom Providers grows 10% this year as consumers get serious about value – and reward the brands that deliver it.

Content bundling, the big innovation of the early 2020s, has reached its limits. Most premium providers these days have tie-ups with streaming channels: it's nice, but no longer distinctive. (It's different when telecom providers operate their own exclusive channels, e.g. T-Mobile/Deutsche Telekom's MagentaTV, which still sets that brand apart in Europe.)

Even the smartest content plays cannot save a telecom brand if its core value proposition feels opaque – or worse, extortionately overpriced. Online backlash to pricing can be loud and sticky, inevitably pushing some customers toward MVNOs and other challenger brands. In a maturing category, top brands must have Pricing Power. Not so that they can raise rates, but so that the can fend off low-cost challengers without compromising their margins.

Pricing is not only a challenge in developed markets. First-time 4G users in developing economies can also become disillusioned by data costs in the short-form video era.

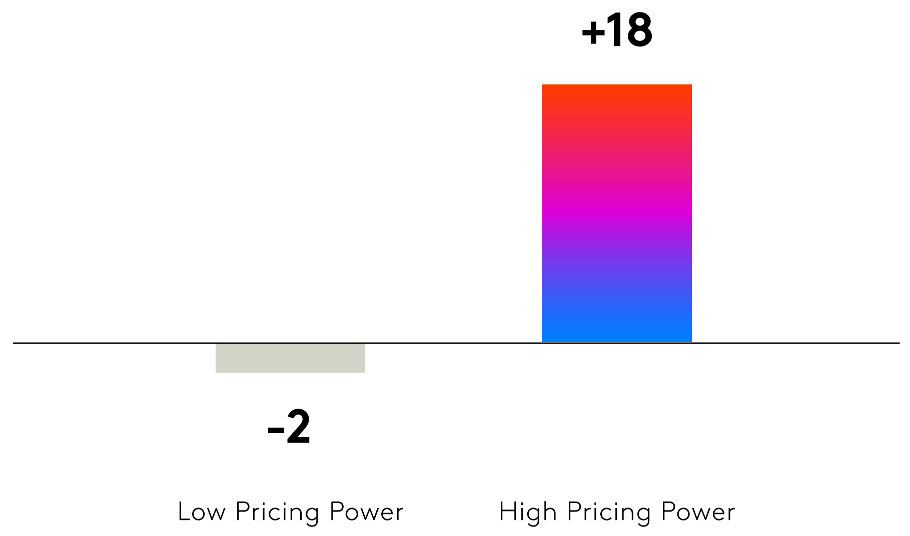
What this means is that marketing has been crucial to top brands' recent upswing. It explains why a service costs what it does, and what clients can expect for their money. When top brands slip at this task, challenger brands can gain an opening. Often, it's not just lower prices that help the startups here, but also greater perceived transparency in communications. (France's Free has succeeded on these terms, at home but also increasingly abroad.)

So where can the big brands look for growth? First, there's opportunity in satellite broadband and phone connectivity. 5G and 6G claims have often struck consumers as too abstract. By contrast, low-orbit satellite networks provide a more comprehensible and excitingly futuristic innovation claim. They also solve a clear problem by serving rural areas that traditional infrastructure fails to reach.

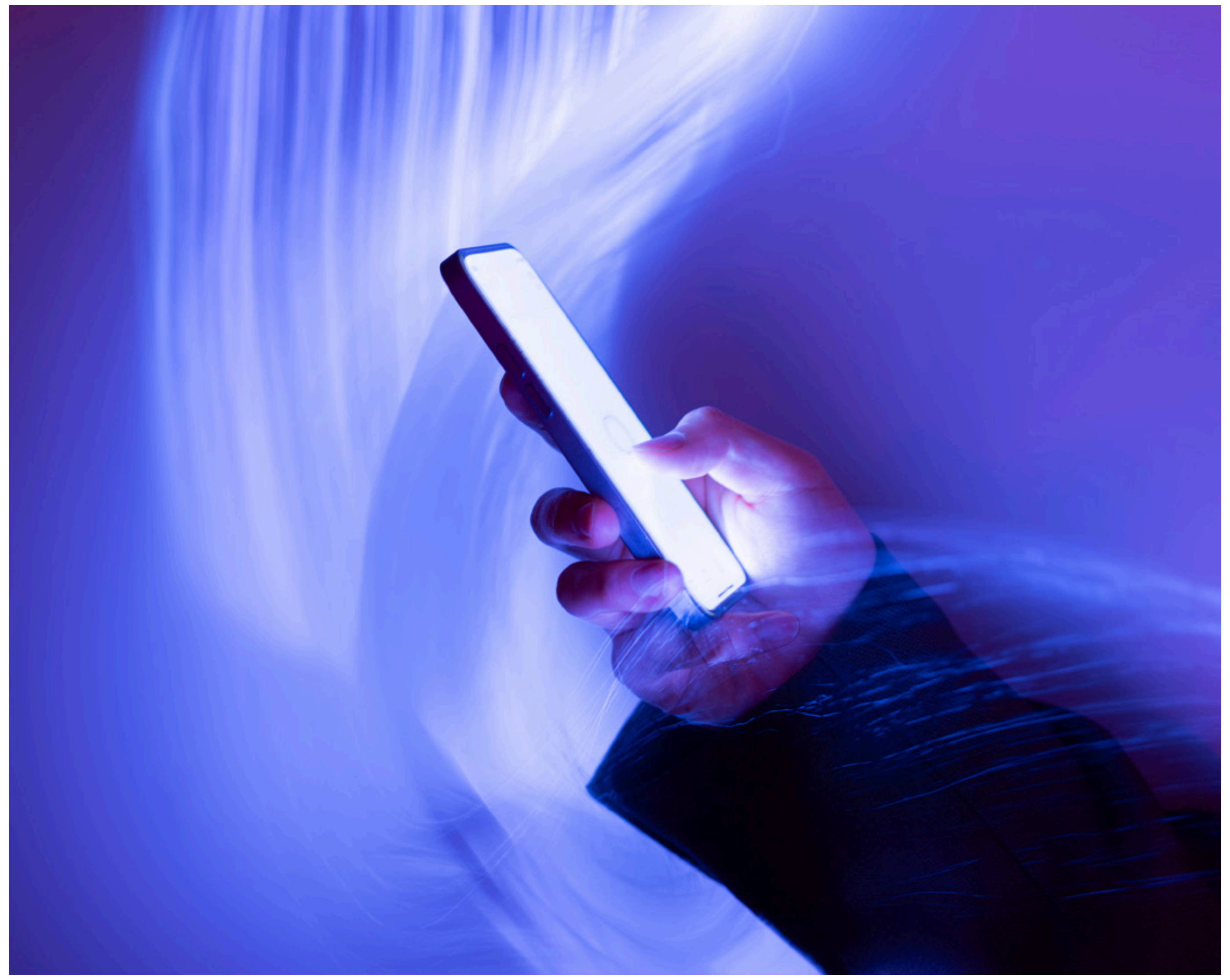
Second, brands can get better at using CX as a brand-building touchpoint, not just as a way to solve care or servicing problems. At a time of expanding choice, providers need Meaningfully Different experiences to shore up predisposition between plan renewals or data top-ups.

And third, brands can use signal intelligence to identify pain points in CX and paths to purchase. This will help them identify any obvious blind spots in their quests to be more present – while also potentially surfacing that one crucial insight that could lead to a new and Different innovation (in a category that needs some shaking up).

In a mature category... Pricing Power wins
Brand Value change % 2025-2026



Kantar BrandZ, Top 10 Most Valuable Telecom Providers, 2026



Nick Snowdon
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Why AI is a golden ticket to boost brand trust!

Consumers are demanding better transparency in many sectors. Telcos in developing markets aren't alone, particularly in this AI-driven era of rapid, opaque change.

Yes, AI is opening up new opportunities to improve efficiency and add value. But this is also a key moment to focus on brand trust. Telcos that prioritise AI clarity and educating the customer on end-user benefits, not just techy specs and features, will outperform.

Seizing on AI as the latest buzz and littering mentions of it across your communications in the hope it will make you seem innovative is tempting. But if everyone is doing this, it probably isn't going to be very helpful or differentiating!

Instead talk about how this is the moment to clarify that your telco brand doesn't believe in AI being a totally uncapped Pandora's Box of tricks left to run rife. Talk about the benefits sure, but talk also about where human connection is still better. Demonstrate how your brand still cares about this, and the ways in which you're adopting AI in a controlled and responsible way that maintains transparency rather than undermining it.

This can zig when others are zagging – the use of trust and transparency as fuel for brand difference and advocacy. Trust that's built through proactive servicing and communications will open up better, more meaningful connections.

TELECOM PROVIDERS

BRAND SPOTLIGHT

AT&T

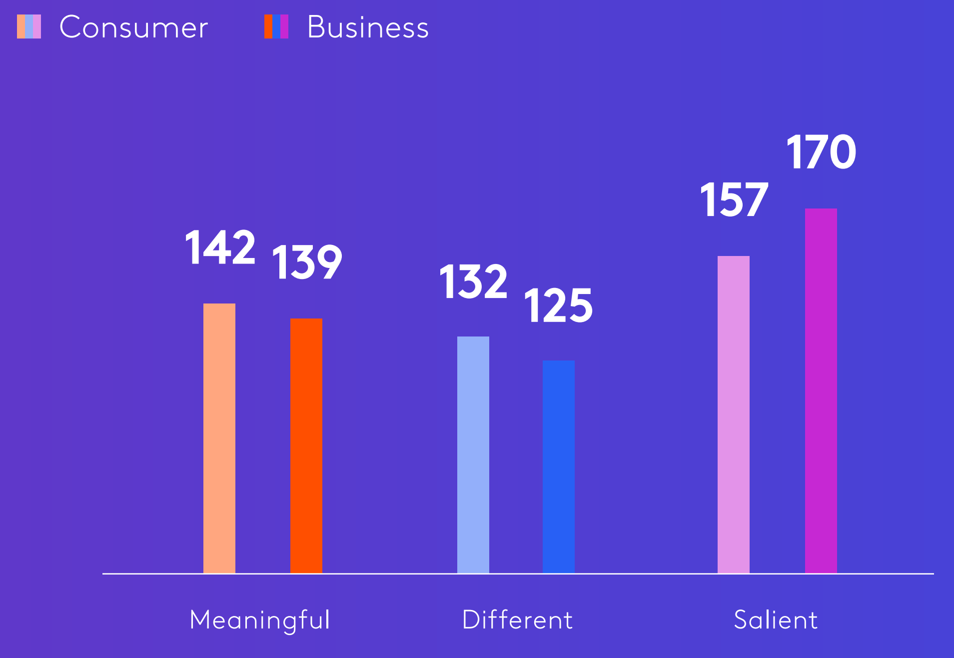
2026 BRAND VALUE

$107,032 M

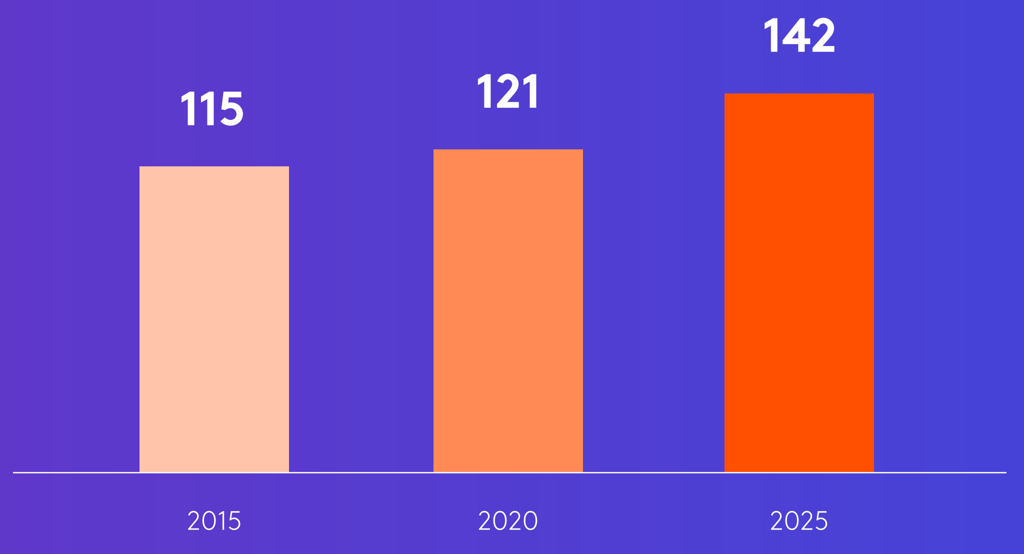
+23% vs 2025

AT&T's recent success comes from a deliberate return to core connectivity. Combined with a massive investment in fibre and 5G, AT&T aims to communicate that it is focused on one job: being the best network for its users. In particular, AT&T has made trust a cornerstone of its Meaningful consumer connections, introducing the AT&T Guarantee which provides automatic bill credits for qualifying service outages. The brand also shows up consistently in important cultural moments, most notably across two decades of activations during March Madness, the US college basketball tournament.

US brand equity



Meaningful Index, US, consumers



Source: Kantar BrandZ, USA, Business Communications Providers, 2024; USA, Communications Providers, 2015-2025 (rolling 2 year data)

BRAND TO WATCH

iliad

Growing from zero to 13 million Italian subscribers since 2018, **Iliad** promises not to increase prices – ever *('Per Sempre')*. This sets Iliad apart from some competitors' complex billing plans and hidden price hikes.

Future Power Index

155

Source: Kantar BrandZ, Italy, Communications Providers, 2025

IMPLICATIONS

01

BE MORE PRESENT

Many telecom brands already have strong brand equity, but need to be more present when consumers are making decisions. It's about finding the weak points in people's paths to purchase: are there any issues with your brand's distribution? Visibility? Product range? From there, you can drive discovery even further by optimising for machine-led channels, e.g. search, assistants, agents, and retail algorithms.

02

DISRUPT THROUGH DIFFERENCE

Telecom challengers have succeeded against incumbent brands by finding a different way to disrupt the category – through pricing, distribution, or identifying an under-addressed pain point or grievance. Knowing people's reasons for *not* choosing a telecom brand is vital intelligence.

5

BRAND PERSPECTIVES

JONATHAN ADASHEK
SVP MARKETING & COMMUNICATIONS
IBM

Jonathan leads IBM's global marketing, communications, ESG, branding, corporate citizenship, and strategic events functions, as well as federal client business development. Head of Marketing since January 2022, he's aligning IBM's marcomms efforts with its broader business objectives, including campaigns focused on AI and hybrid cloud under the 'Let's Create', platform.

Before joining IBM, he held senior roles at the Renault–Nissan–Mitsubishi Alliance, Microsoft, and Edelman, and has also worked in the U.S. government and on political campaigns. He brings over 25 years of international experience across technology, automotive, government, retail, and energy sectors.

View the full interview on:
Kantar BrandZ's YouTube playlist

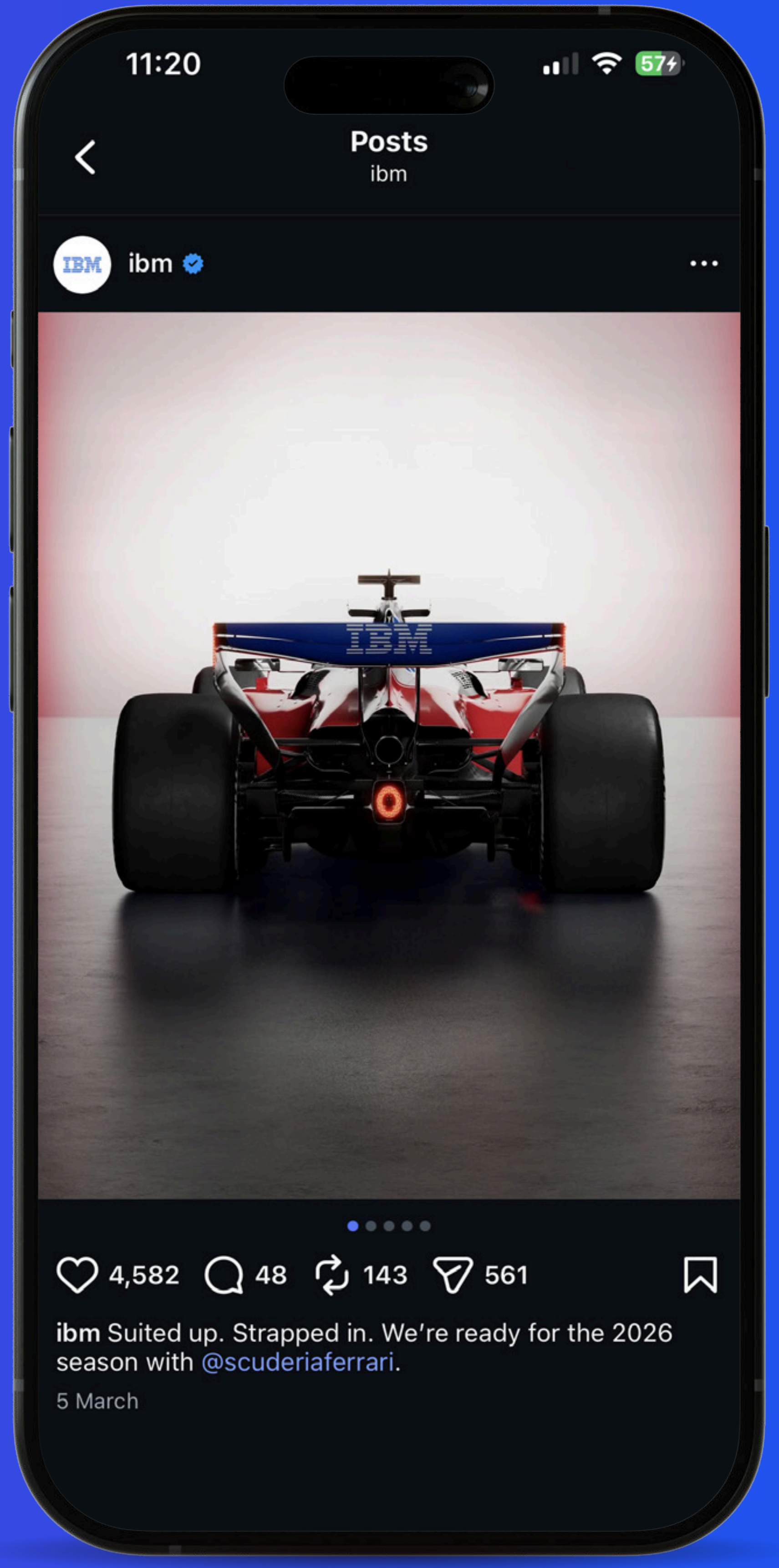
How does your brand strategy ensure you're not only delivering functional benefits, but also building an emotional connection with your customers?

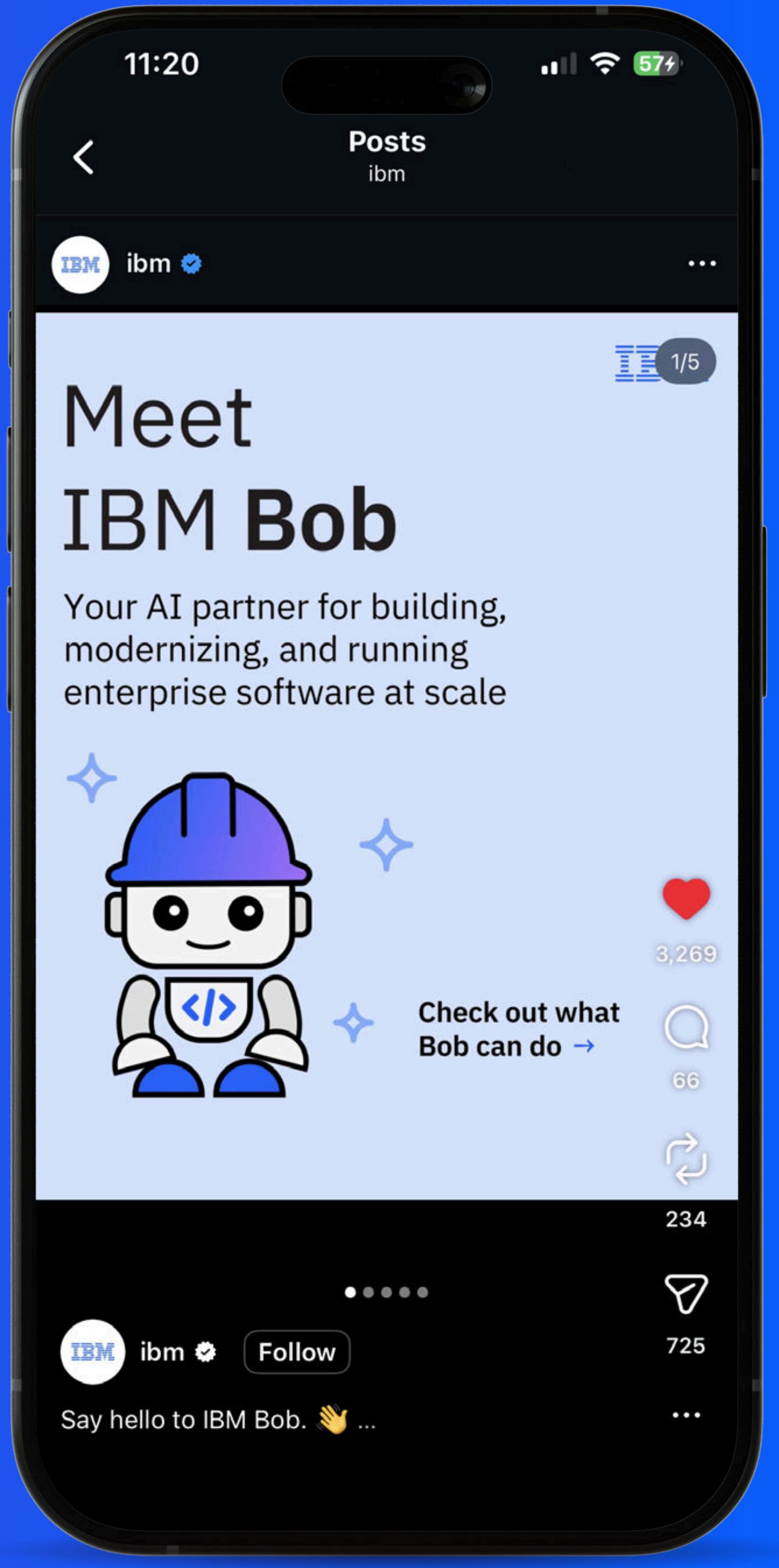
We've got a great set of tools that connect with the emotional as well as the functional side. Like the work we do in sports: by bringing together somebody's passion and making sure we tell them a story that relates to that passion. We've been partners with the Masters, the US Open, and Wimbledon for more than 30 years. We've been working with the Grammys, Fantasy Football, and ESPN in the US for almost 10 years. And we've been working with UFC and Ferrari on F1 for the last year. These partnerships give us different opportunities to make that emotional, passionate connection with our clients by way of authentic storytelling moments. We do it in a way that ensures people can understand the innovation opportunity for them and see it in action through our sports and entertainment collaborations.

What do you see as IBM's most promising sources of future growth, and how is marketing helping to unlock those opportunities from a strategic perspective?

Right now, the biggest opportunities for us are in a continued focus on hybrid cloud and AI, and being the best platform for that technology. When Arvind Krishna became CEO in April 2020, that's what he decided and what he's been pushing since. For us, it's not just talking about it, it's about demonstrating how it's happening in real life. We've got an internal initiative called Client Zero, which is about using AI and automation to improve our operations. Every company today is looking at productivity and speed to value, and we're doing the same.

With Client Zero, we've taken 4.5 billion dollars out of our annual run rate of spend, largely through AI and automation. It's proven to be very beneficial for us, but it's also proven to be a blueprint we can take to our clients, partners, and prospects. It is helping them think about their journey – how they can grow and how they can use technology to fuel it.





Jonathan Adashek
SVP Marketing & Communications
IBM

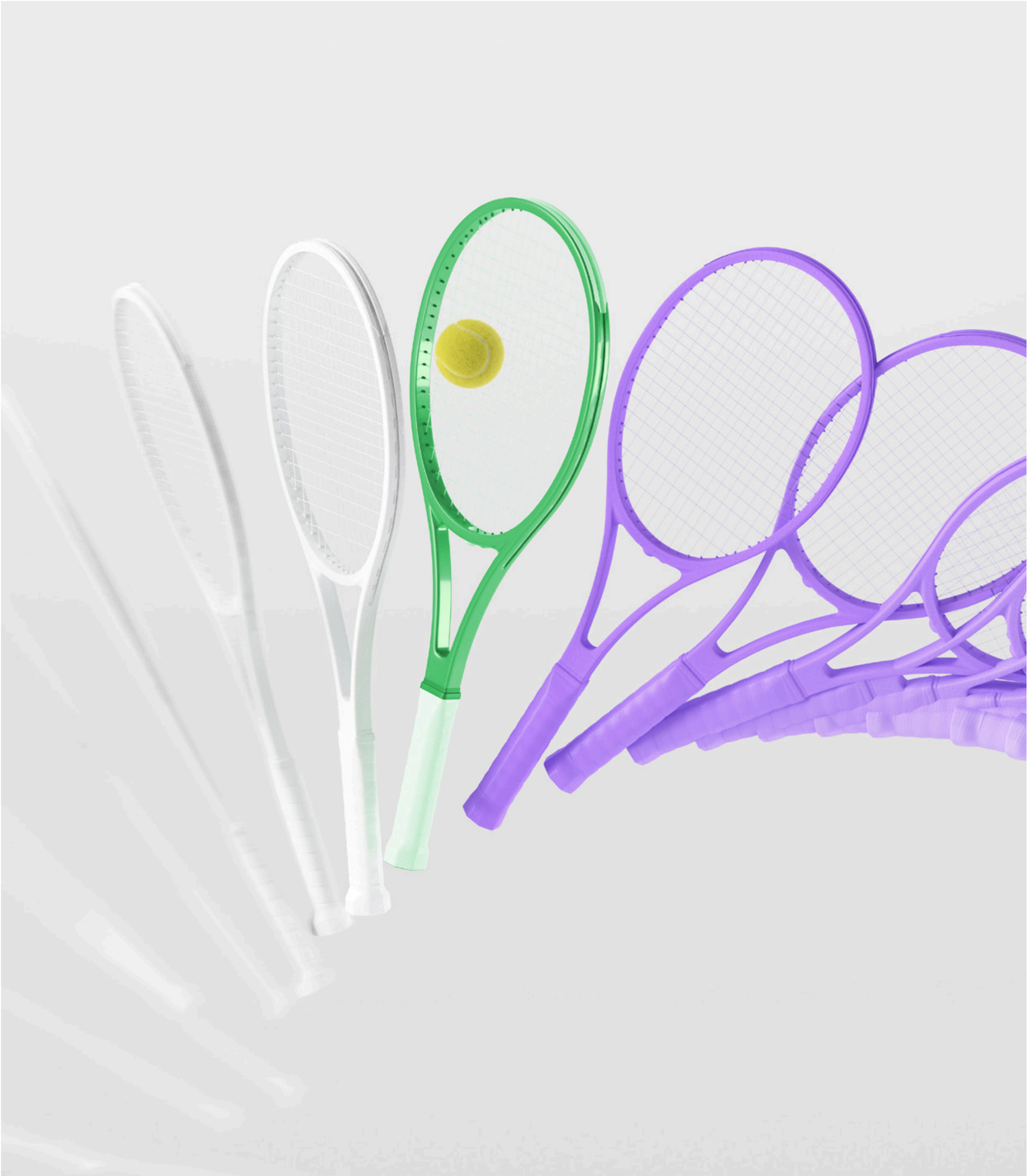
Which customer trends do you think brands need to pay the most attention to in your industry in the next few years? What kind of signals are you looking for and how do you pick up those signals?

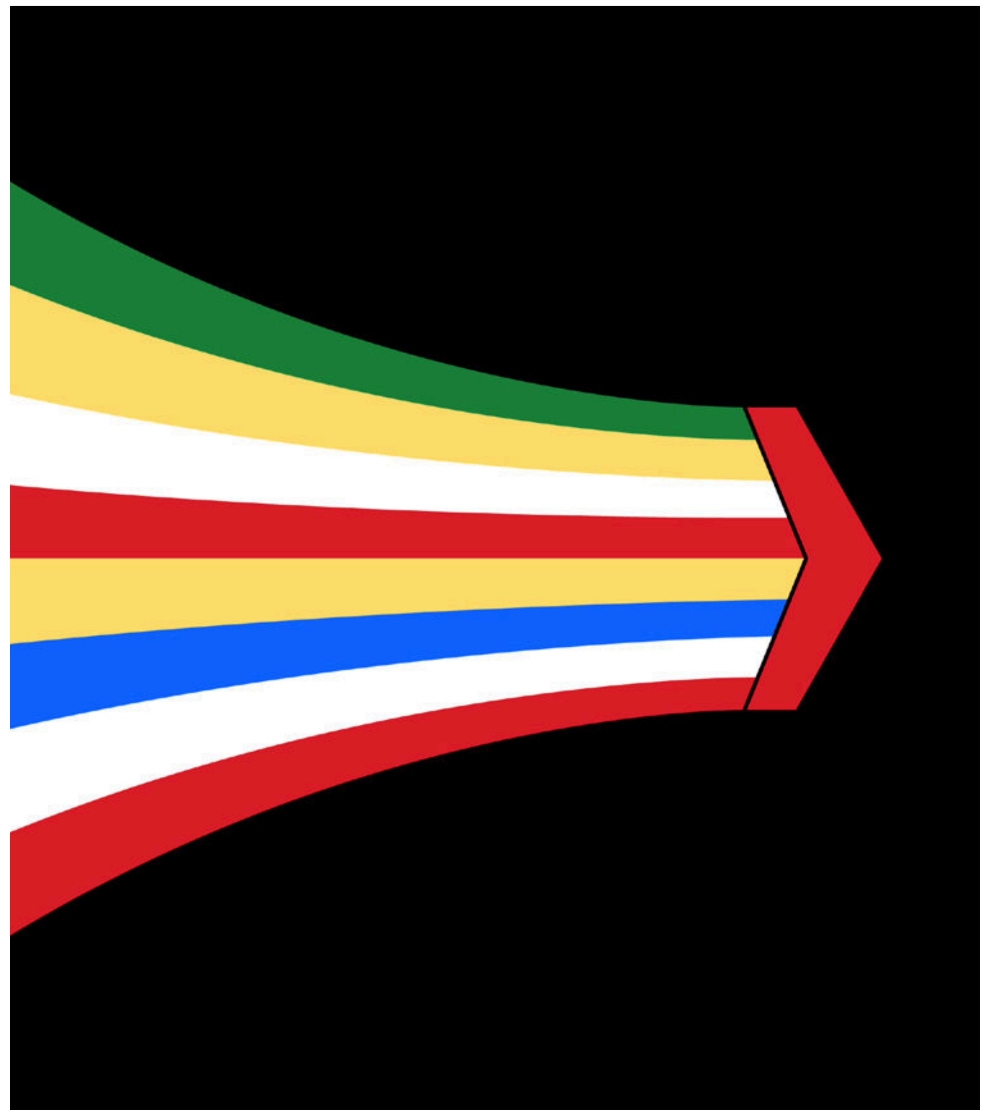
The biggest one for me is AI agents becoming the first touchpoint for consumers. They are starting to use AI to research and filter the information they want, and to look at what brands are doing. In response, it's about ensuring you're targeting prospective clients with precision as those agents filter out the brands based on their preferences, needs, and interests. AI share of voice and generative engine optimisation are going to be very important as we think about brand strength, visibility, and sentiment in LLM-created content, or even model-created content generally. It's going to be crucial for every organisation today to get ready for that future.

In the era of enterprise AI, I also think the approach of co-creating with partners showcases a style of innovation. Alongside that is finding ways to continue to apply emerging technology to make businesses more productive, efficient, and agile. We've developed a model that's helping us better understand the ROI on campaigns so we can pre-empt what would happen downstream, for instance, if we were to pull a specific lever. But the trick is making sure that you don't automatically turn to the tactic or action that has the highest level of ROI. If you do that, and forget about everything else, then the funnel has changed massively and may just collapse on you. You won't have any sort of funnel, let alone a working one or a leaky one.

What would your advice be for young marketers entering marketing today? What are the skills that they need that we may not have had many years ago?

Roll up your sleeves, understand the business and get as close to it as you can. When you have a conversation with your peers and you're talking the same language as them, you get a lot further a lot faster. Secondly, use AI to handle repetitive routine work. You can't give it all to AI, but you can use it to help you. Along with the technical skills, you also need uniquely human skills like better judgement and critical thinking skills. Having a continuous learning mindset is also key – getting up to date on a skill and expecting that to take care of you for the rest of your career is not realistic. The average shelf life of skills today is just under three years, so you have to invest time in constant reskilling or upskilling.





BRETT HANNATH
CHIEF MARKETING OFFICER
INTEL

intel®

Brett is CMO at Intel Corporation, where he shapes global brand, marketing and go-to-market strategy to drive differentiation and growth in an evolving tech landscape. With a 35-year enterprise technology career spanning developer roots to senior marketing leadership across Oracle, McAfee, Trellix and Intel, he combines deep technical understanding with business-driven marketing leadership. Brett holds a Bachelor of Science in Computer Science from Monash University.

View the full interview on:
Kantar BrandZ's YouTube playlist

How has the role of the CMO changed, and how do you see it continuing to evolve in the next few years?

In just the last five years, it's changed in that we not only have to operate a marketing team, but also in how we communicate what we do to convince a business that we provide value. I've recently witnessed the reinsertion of brand as something that's just as important as the demand function, and that means having to cope with making the right investment decisions, and having the right skills balance within the organisation. Where previously a brand capability may have been shrunk in order to beef up a demand capability, a CMO is now having to reinstate those skills or go further afield to reform thinking around brand.

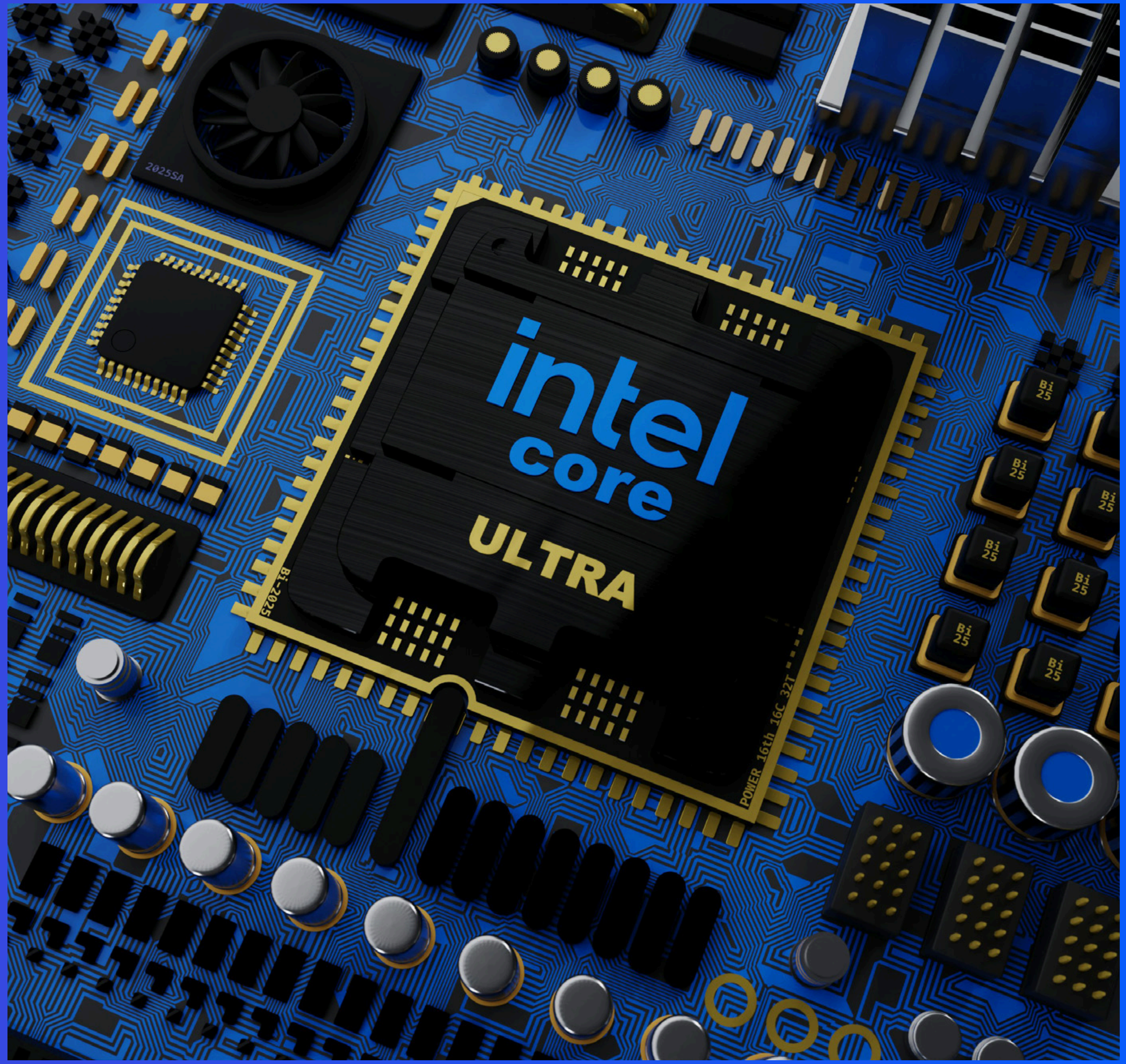
You don't necessarily need to be the expert, but you do need to be very well-informed across demand, brand, creative, omnichannel, B2B and B2C activation, and other disciplines in order to be the most effective in the CMO role. The scope of understanding to lead a high-performing team has really increased over the last few years.

What do you see as Intel's biggest job to be done today, and what kind of intelligence do you need to shape your brand strategy?

It's looking to the past to see where the brand got its original strength, and deciding whether the same relevance and perceptions around it still serves where the growth of the market and the company is going. The traditional strength of the Intel brand was in the birth of the PC, which is a big component of our business, and therefore that does remain relevant. But we also now have the whole AI phenomenon, and if future growth for the company is in robotics, does the old brand suit that? Not necessarily, you could argue. But we could look at where our roadmap will allow us to go to acquire new customers and new uses of our embedded tech, and start to twist the brand narrative to extend naturally to those. And I think that's one of the hardest equations: how do you extend something that's very well understood by Gen X, but not so much Gen Z, and authentically extend into new markets.

How do you communicate functionality while also building an emotional connection in your marketing? How do you bring those two things together at Intel?

Our B2B audience is very tech-savvy, so we try to instil authenticity and not overpromise. Because I think that's where some B2B tech companies fall short – the functional reality of their deployment is not quite what they promised. And that breaks down brand trust. So we are extremely careful to develop messaging that's provable. It's benchmarked and tested.



Brett Hannath
Chief Marketing Officer
Intel

On the B2C side, we have a very strong legal department and I love that they always question our claims of being the best. They challenge us with, 'Where's the proof? Where's the test? Where are the solid, documented facts that make the claim believable?' So, we're very grounded in product truth.

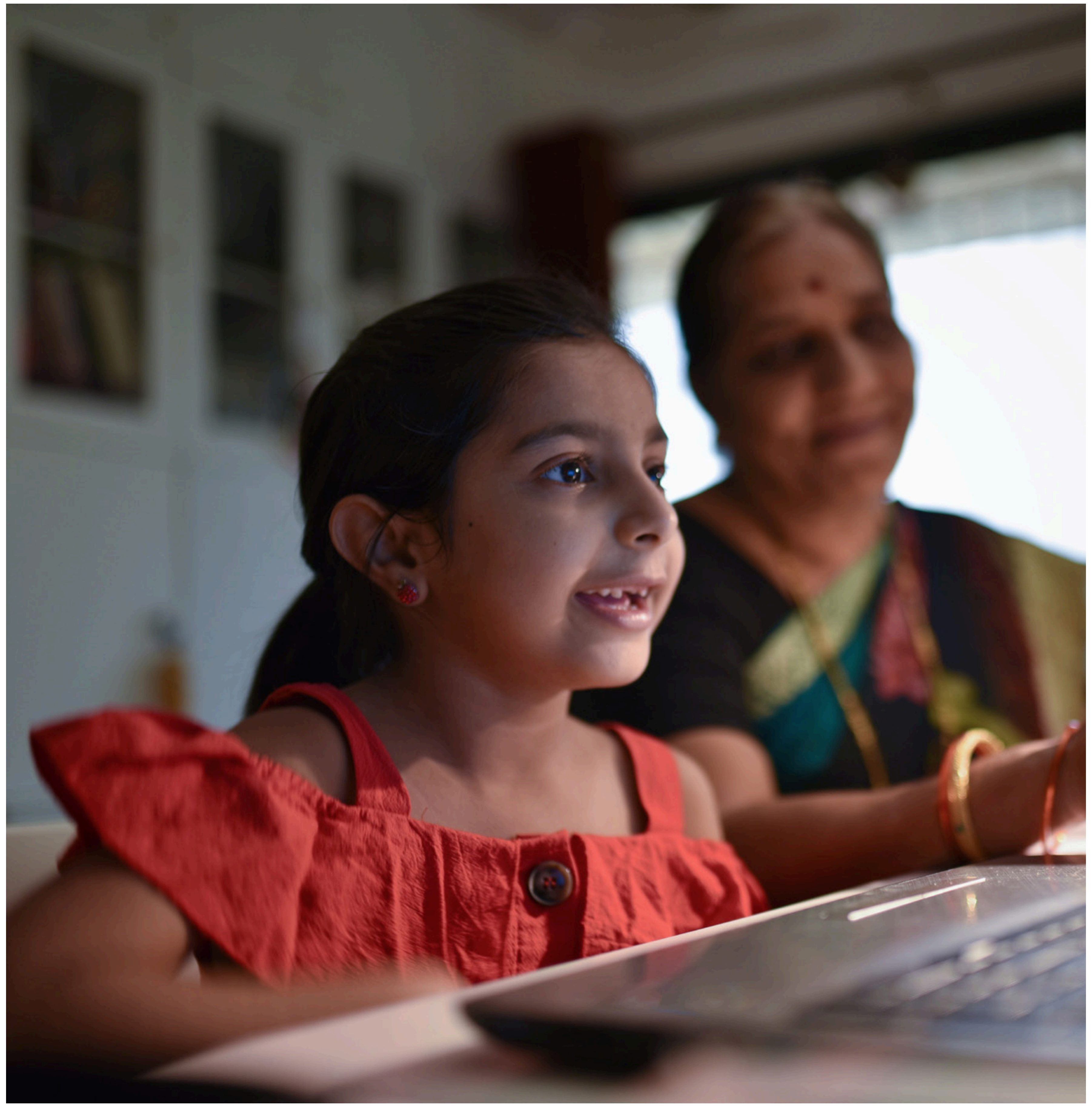
What does the phrase 'cultural relevance' mean to you at Intel?

To colour it with an example, education in India was a brand exercise for us in 2025. Kids being sent to school there would be exposed to their first device. India is technologically very mobile-first, unlike Gen X generally, which was PC-first and then onto mobile. So this was the first opportunity to provide an Intel-based device rather than a mobile to children in India. We knew that the education system is different. The aspirations of a parent wanting their child to be successful in life is a very different story you tell in India versus in the US. We really wanted to do this right, with Intel advancing the education, ambitions, and future of these children. We started to represent that story in local language, local imagery, and local words, which worked incredibly well for us. Rather than taking a big education push globally, we embedded tone, imagery, and cultural sensitivity into it from the start.

Another example of cultural relevance with more of a subculture component lies in gaming – it's such a huge movement that you can't just go in with the universal blue and white Intel ad to convince a triple A gamer that we've got great tech.

If you look at other brands trying to reinvent themselves and culturally relevant, look to the efforts of Starbucks; trying to turn the fast food experience that it turned into, supply chain management, high throughput, high velocity sale, to the cafe experience, like getting back to its roots. I really appreciate what they're trying to do as a marketer, the direction they're taking, and really rooting for them to be successful. Another one is Macy's. When you talk about cultural relevance, there's this general Gen Z shift back into physical experiences. The mall experiences, or shopping centre, as we call them in Australia in the '80s and '90s is something that people are trying to get back into. And so companies like Macy's who evolved to a very generic physical retail experience, are now trying to create a destination for people. These are legacy brands with assumed representations of their brand, really trying to reinvent themselves to a particular generation.

We can also explore the reality of where people are consuming things, and if you think about platforms like YouTube, they're culturally relevant because they are the central place where people go to consume. It's also interesting looking at Netflix' cultural relevance. In other words, are they producing content that is culturally relevant, but YouTube as a destination is culturally relevant and their ability to maintain that viewership, get people through their algorithms to just stay inside their platform. Two incredibly different approaches, right? One where you own the experience, therefore have to remain relevant, or you nurture and culture the platform through which those experiences are consumed. It's quite fascinating to watch.



What skills do you think a young marketer entering the industry needs to have today versus the skills that made us reasonably successful when we entered the market many years ago?

It goes without saying that one needs to be heavily invested in AI. But that includes understanding how to programme it, and design agents that push out creative and create a brand voice. I'm always watching what startups do, and I subscribe to forums where startups are sharing how they built an entire team with one person and a series of agents versus a whole team of people. That's not to say this will be the end state for the industry and the discipline. It's that in the current climate, if you're just entering this space today, that is a highly desired skill.

We're trying to find people in Silicon Valley with that skill; not in the raw sense of defining AI and working with a Claude or a Gemini, but actually applying it to a marketing workflow. Given that agents can quickly become more expensive than people, how can talent help us make this a scalable solution?

ASMITA DUBEY
CHIEF DIGITAL & MARKETING OFFICER
L'ORÉAL

Asmita began her career in advertising working in both India and China on campaigns for some of the world's biggest FMCG brands. She joined L'Oréal China in 2013 as CMO, where she was responsible for laying the foundations for the Group's e-commerce acceleration (including building the Group's first joint-business partnerships with Alibaba and Tencent). She was appointed Chief Digital Officer for the Consumer Products division in 2017 and additionally in 2020 was named as Chief Media Officer for the L'Oréal Group. She has helped the Group and its brands maximise media value and ROI by focusing on the key digital growth drivers. Asmita joined the Group's Executive Committee as Chief Digital and Marketing Officer in April 2021.

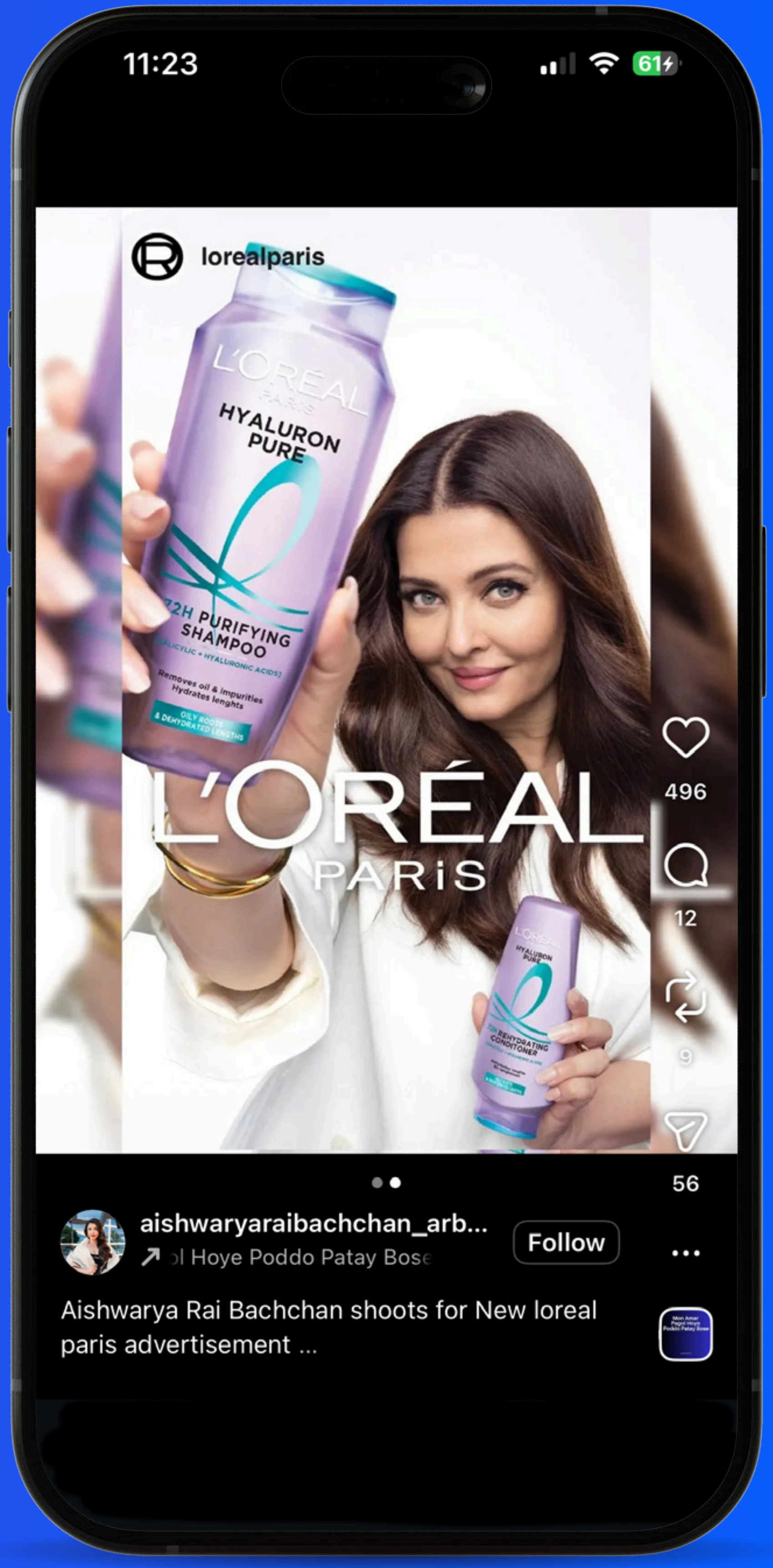
View the full interview on:
Kantar BrandZ's YouTube playlist

How would you say the role of the CMO has changed in recent years?

I would sum up the last decade of the marketeer's dilemma with one word: fragmentation. Looking at consumer behaviour, brand building is moving from what brands say to what influencers say, and what creators say to what people say. It's more peer-to-peer, and that is what's fragmenting.

How do you invest most efficiently with the decisions that you're making around your marketing budgets?

In terms of consumer activation at country level, it's about where in the journey the beauty consumer is. That is constantly changing; therefore we are constantly reinventing beauty experiences.
We have a proprietary ROI tool called BETiq, which does marketing mix modelling for short-term ROI, but also brings in long-term brand equity multipliers within that. With those combined, we are very agile in our decision making. What Kantar refers to as signals and signal intelligence, we at L'Oréal call seizing what is starting. And at very senior levels in our organisation, we are like poets and peasants. We want to understand it. We want to spend time on it. Then we want to pick it up and make sure that everybody in the company is moving in that direction.



Asmita Dubey
Chief Digital & Marketing Officer
L'Oréal

What is the most significant lesson you've learned about building great brands? How does your strategy deliver on that?

I'm preaching to the choir here but in a sense, brand equity is what helps us get to the reason why somebody chooses one brand over another. We now have Demand Power and Pricing Power as metrics, and therefore we have to think in today's world about what demand generation and demand capture is, both in the short and long term.

With L'Oréal Paris being the number-one beauty brand in our portfolio, it cuts across multiple categories: skincare, haircare, makeup, hair colouration, and more. The brand stands for science, which is efficacy. Our products are high-quality, they deliver. And if we are talking about a collagen lift, then certainly it lifts the hair and the results are there for all to see. When we talk about women empowerment, having a great hair day means confidence, which empowers a woman. L'Oréal also stands for Parisian heritage. It is in how we tell our stories, whether we are part of 'Emily in Paris' on Netflix, 'The Devil Wears Prada 2', or some other cultural form.

L'Oréal is not a collection of brands; it is a unique, integrated ecosystem. Our strength lies in our 'One L'Oréal' mindset: a robust matrix that allows us to be both strategically aligned and operationally decentralized, leveraging our global scale to accelerate the success of every single brand and every single territory.

What does cultural relevance mean to you and to L'Oréal, and how do you believe achieving that can contribute to a brand's longer-term success?

It's about moving at the speed of culture, because culture changes so fast and it's so diverse. L'Oréal Paris's culture can be expressed in entertainment, in film, in drama, and in series. That's 'beautytainment' – bridging beauty and entertainment – and it's one way to be part of that culture. Take the film 'The Devil Wears Prada 2': L'Oréal Paris is part of the story because it's very aligned with the tone and manner of what the film is about.

How do you feel AI is influencing your brand strategy?

The way discovery is happening is changing. And from discovery, when we get further into the funnel or the next stage of the journey, beauty is becoming conversational like never before because of LLMs.

We have always had consumer care as a topic in online chats, but today we see that people are having 10-minute conversations about it on LLMs. For the consumer, it's clearly an opportunity for so much discussion. And then there is agentic shopping which promises to come with more seamless consumer journeys, with agents even doing the buying. We are testing some of the first ads on OpenAI, looking at Google Direct offers and beauty agents. And our thousands of marketers' end-to-end journey consists of looking at consumer insights.

We are absolutely embracing generative AI in the beauty industry. We have a platform called CreAItech which our marketers are using to create images, videos, and text; but they do so with the guardrail that we will not use AI-generated face, hair, body, or skin to enhance the product benefit.

What do you see as L'Oréal's primary job to be done in the next few years? What kind of intelligence is shaping that?

For L'Oréal, it is about desire and continuing to create demand for our products based on this. We are constantly bringing product innovation. That innovation becomes meaningful because it lives within our brand. Our job is to innovate in a way that allows it to sit meaningfully and with a sense of purpose in all products to come. That could be life-changing dermatology for sensitive skin, or it could be a daring beauty that celebrates change.

Science, technology, and creativity are the three pillars that shape the innovation that is part of our DNA.

MARK WEINSTEIN
CHIEF MARKETING OFFICER HILTON

As Chief Marketing Officer, Mark leads the global team responsible for brand and performance marketing across Hilton's 27 brands (with more than 9,100 properties and over 1.3 million rooms, in 143 countries and territories). His decade-long stewardship of Hilton Honors has seen the award-winning loyalty member programme grow to nearly 250 million Hilton Honors members.

View the full interview on:
Kantar BrandZ's YouTube playlist

How has the CMO role evolved in recent years?

It's become one of the most dynamic roles in the C-suite. And in a way, that's a return to form. If you look at how the CMO job started, it was so multifaceted: CMOs were the chief storytellers and the chief defenders of the customer. They were the executives who believed in the market and understood all of the trends. Then, maybe a decade ago, the job started getting shrunken down or split in two. Suddenly the CMO was either in a brand role or in a performance marketing role, but rarely both.

I've enjoyed watching those two halves come together again. What makes my job so fulfilling, challenging, and accountable is those dual responsibilities. I have to be responsible for the long-term stewardship of Hilton: what it stands for in the world, how we show up in the world. And I also have to be accountable for the growth and performance of the company at any given time.

I genuinely believe that marketing sits at the bleeding edge of the entire company. So many parts of the company can learn from the market signals that we're tracking, and from the humans that we're learning about. That includes internally, in functions like HR.

What are the most promising sources of growth for Hilton going forward, and how are you planning to tap into them?

It's almost an abundance of opportunity. First, there are our existing customers. As we speak today, we have nearly 250 million Hilton Honors members. With this group, we've already incurred the customer acquisition cost. We've already spent the money convincing these customers that Hilton's the brand for them. So our focus shifts to the power of getting even *one more* stay from each of those customers. It's about becoming even slightly more preferred, so Hilton's not just seen as equal to our set – but actually, meaningfully better.

How do we accomplish that? Some of it will come from adding more brands and more locations. Some of it will come from adding new types of hotels. We know that's true because when we talk to our members, we sometimes hear them telling us, 'You're not always the brand for me because you don't have what I need for this specific trip'.

Great product can address that concern. But great storytelling can, too.

Mark Weinstein
Chief Marketing Officer
Hilton

But then also, a lot of our growth will come from new customers. These are people who might know who we are, but who haven't yet thought of us as the brand for them and for their travel occasions. We see a lot of these customers at the extremes. At one extreme, we're adding a lot more luxury hotels, and letting people interested in that segment know that we're available to them. We've got Waldorf Astoria which has long been the greatest of them all, and the most iconic brand in luxury. As we add more locations across the world, we're unlocking new types of stays for people who didn't otherwise consider us.

On the other end of the spectrum, we have a new set of brands in the premium economy space. The growing global middle class is *the* story, I think – not just of today, but of our lifetimes. If you think about India, they will add 100 million middle-class travellers in the next five years alone. Those are customers that could be ours. Globally, a lot of customers in this band know us. They love us. They say we're worth the premium. They just don't think they can afford us. So as you create new product categories for this group, and market towards them, you're giving them access to a brand they already want to choose.

Our aim is to be the same Hilton regardless of who we're talking to: to be true to who we are, to tell the story of the stay and what makes us unique in the marketplace. But yes, we have to recognise that the way we go to market will evolve with our customers. The channels we choose, the way we tell our story, the price points we unlock: all of these will continue to change.

How is AI technology influencing Hilton's brand strategy and approach to marketing?

First, in all the expected ways. We're optimising how you dream, book, shop, and experience our brands – transforming from SEO to GEO (Generative Engine Optimisation), and connecting with people's agentic search capabilities along the way. Hilton also produces a lot of what I'd call functional content; we have to communicate features and functions for 1.3 million rooms across the system. I would argue humans have never been the best at doing that, we've always been second to technology. Having AI help us with functional content will free up our people to work on the more creative parts of the business. I'm really encouraged by that.

In that sense, I think of AI as the great creative equaliser. An unfortunate outcome of how big and complicated the world has become is that sometimes the best brands and the best ideas don't win. That's because the people behind them lack the resources (tools, agencies, partners, scale, technology) to bring things to market. I love that AI is resetting that. Nowadays, really creative ideas have a fighting chance no matter who you are – be that a kid in your basement with a smartphone trying to create something new, or a big global brand with legacy production facilities. Human creativity and human ingenuity will win the day.

I also think AI is going to make us crave and seek out human interactions. And I'm really excited about that. Because let's be honest: we're now in a place where you can't necessarily believe anything you see, hear, or experience digitally. So what's the antidote? The antidote is in-person, live experiences: restaurants and theatres and concerts and hotels. These experiences are inherently believable. It's your feet in the sand. It's watching the fireworks at the end of the night with your kid on your shoulders.

DREW PANAYIOTOU
CHIEF MARKETING OFFICER
KEURIG DR PEPPER

Prior to joining Keurig Dr Pepper in 2024, Drew Panayiotou held marketing leadership roles at Alphabet, Johnson & Johnson, Disney, Coca-Cola, BBDO, Best Buy, Chick-fil-A, and Pfizer across a 30-year career. Soft drinks brand Dr Pepper rejoined the Kantar BrandZ Global Food and Beverages ranking in 2025 and continues to shine in the 2026 category ranking.

View the full interview on:
Kantar BrandZ's YouTube playlist

What's the most significant lesson you've learnt about building great brands?

It's interesting – no matter what industry I've been in, there's been this principle that holds true about 'raving fans'. As a general rule, the top 20% of our customers generate between 60% and 80% of our revenue. That's been true when I was at Chick-fil-A and the category was QSR, when I was on the tech side at Google, and now at Dr Pepper.

The lesson I take from this is: to build a really powerful brand, you need to have a really powerful core.

In our craft, the general principle is that you grow brands through household penetration. And that is still true in a sense – you *do* want to grow household penetration. But it's your 'raving fans' who actually influence those new consumers you're working to attract to your brand. It's your existing fans who are out there recruiting others and driving awareness of your brand in a meaningful way.

That's really important to understand, because it replaces this notion of a funnel. Again, traditionally, we've talked about this process where people become aware of a brand and then go neatly 'down the funnel' to make a purchase. But I think it's much more of a flywheel, which I call 'the new F word'.

If you think about what makes a flywheel different than a funnel, there's a power source. That power is your 'raving fans', and they're even more powerful these days because of social media. You have to communicate with them to fan more acceleration. Fan activity on social media is at the heart of how you can drive energy and connection around your brand.

That's a different view on how you build brands, but I've seen it as a constant in my career. You have to love your 'raving fans', leverage them, keep them on as your biggest fans. And then you have to use all of that to fuel emerging channels like social media, which will in turn drive the next wave of growth for your brand.

Drew Panayiotou
Chief Marketing Officer
Keurig Dr Pepper

Brand building itself can obviously be very resource-intensive. Where do you focus most of your investment for the greatest impact?

I say this to my CEO often: the cost of marketing is going up because of media fragmentation, and this drives the need for a lot more content for more channels.

If the cost of marketing is going up, you have to drive precision in your marketing. And the only way to do that is to leverage data and technology. One of the most important things a CMO has to do, then, is own their brand's data and data strategy.

There are a ton of opportunities to own your data, and then to connect it with other data pipes so you can really drive better connections. When you're more precise with data and technology – when you make the *investments* to be more precise – that's how you drive marketing effectiveness.

All of our capabilities in this area are better than they were 24 months ago. And we'll continue to see more effectiveness and more efficiency as we deploy better data and technology. That's actually why we've restructured a lot of our marketing organisation – our capabilities and how we work with agencies is how we want to drive that effectiveness.

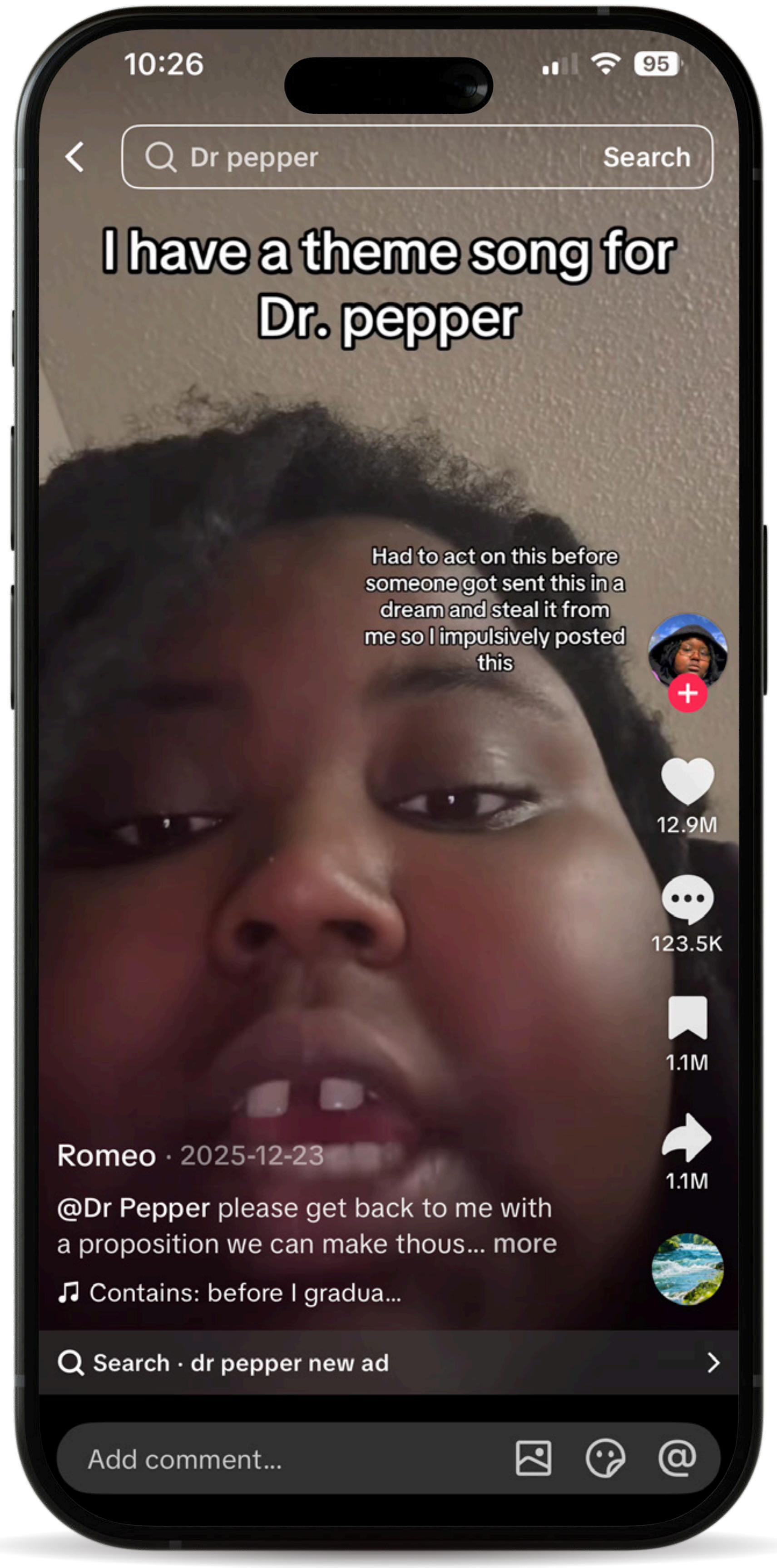
What does 'cultural relevance' mean at Dr Pepper?

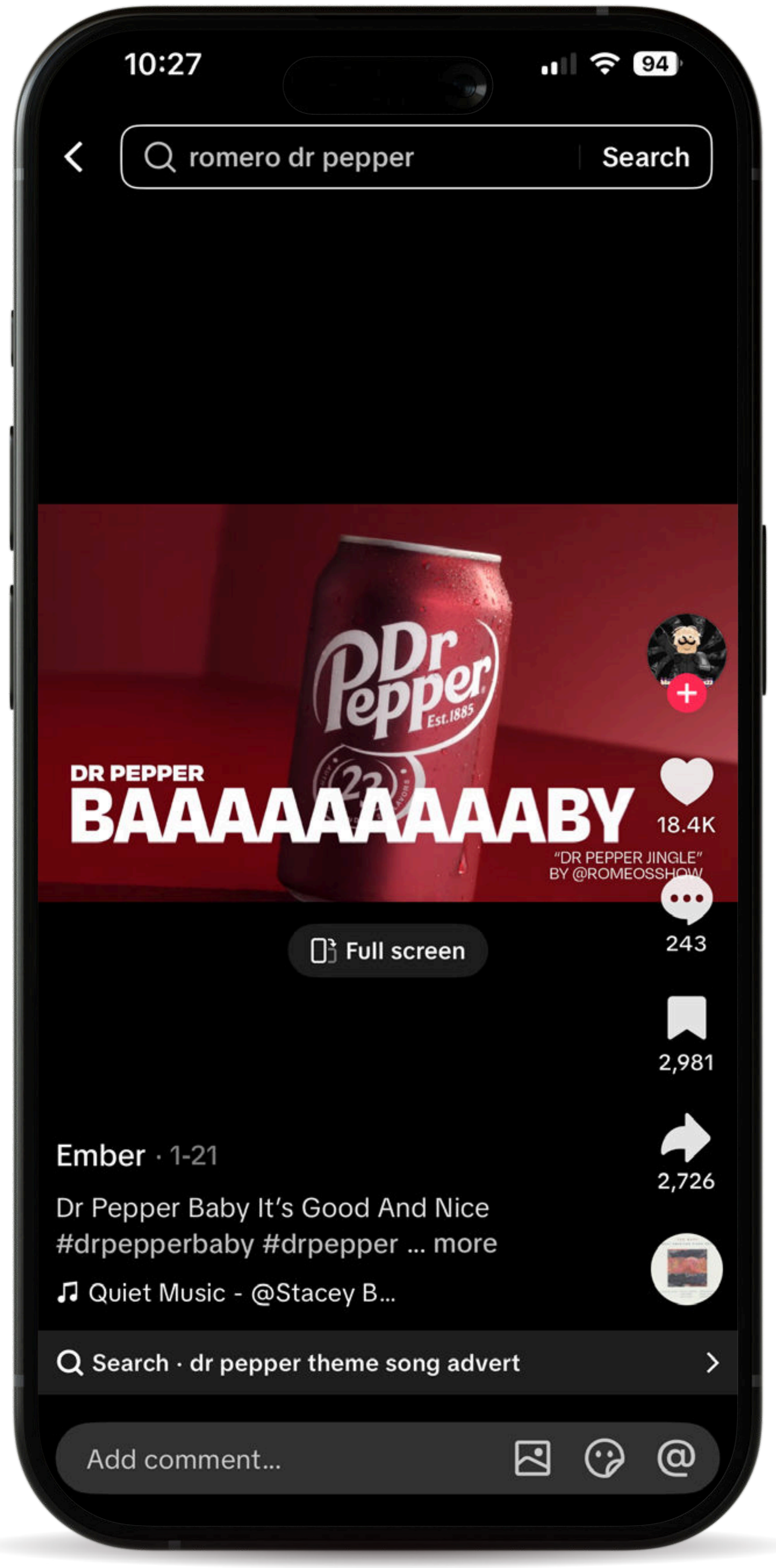
Cultural relevance has evolved from a marketing lever to a critical growth engine. For Gen Z and Gen Alpha, beverage choices are a primary vehicle for self-expression and identity. These cohorts gravitate toward brands that seamlessly integrate into their digital and physical lifestyles, prioritising inclusivity and social presence. In a landscape where ecommerce drives the majority of category growth, a brand's ability to remain culturally resonant is what determines its 'omnichannel success'.

That's why, with Dr Pepper, we've built a brand that can be social. It's why we push for those moments that drive remarkable engagement and two-way interactions with our fans.

We're always on the lookout for 'moment making'. When we see something special that a person does involving Dr Pepper, we respond by making something that connects back to what they were communicating. For example, if they were talking about Dr Pepper at their wedding, we'll do something around their wedding for them.

We've seen the power of Dr Pepper as a social brand. Just a couple of months ago, we had this great experience where a fan named Romeo created a jingle for Dr Pepper and posted it online. It went incredibly viral with over 48 million views within two weeks, and it continues to grow.





We then used that jingle in a commercial we put together really quickly to run during the national championship game in US college football. We created a spot that brought something social into live broadcast. I think now we have over 100 million people who have heard this Dr Pepper jingle.

That's a perfect example of spotting something from a creator, connecting with them, and then doing something together. That's a relationship, not a transaction. Relationships are core to connecting with culture, and to creating heat and vibes around your brand.

To be clear, this isn't easy to do. If you're not a brand that is inherently social, you can't just jump right into these arenas in an authentic way. What I love about Genzennials is they call you out. If you're not authentic, it doesn't fly. We've had to architect all of our brands to be social-first – to have energy, to have a connection with consumers. From there, we interact with our consumers. We're not talking *at* them, we're talking *with* them. That's a big difference.

DON MCGUIRE
EVP AND CHIEF MARKETING OFFICER QUALCOMM INCORPORATED

Don McGuire leads global marketing across all of Qualcomm's businesses. This includes Snapdragon, the high-performance, integrated system on a chip used across a wide variety of AI devices (including vehicles, smartphones, laptops, wearables, and PCs). Snapdragon has strong partnerships with major brands like Samsung, Xiaomi and OPPO. It is also the front-of-kit sponsor of Manchester United and a premium partner of the Mercedes-AMG Petronas Formula One team.

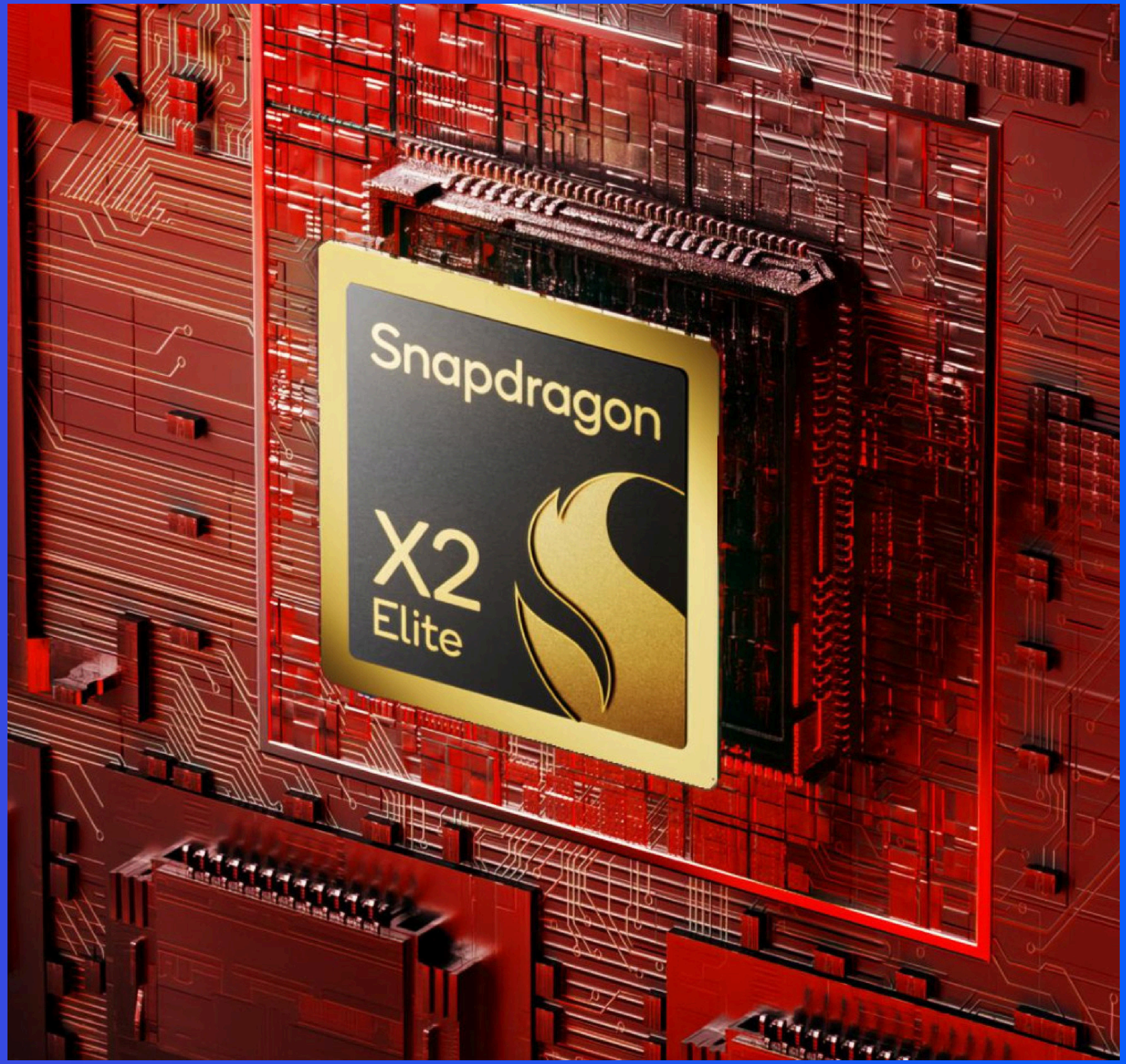
View the full interview on:
Kantar BrandZ's YouTube playlist

What is Snapdragon's primary job to be done from a brand-building perspective?

For Snapdragon, our journey is about getting to cultural icon status. That's my mandate from my boss, our CEO. It's an amazing ask, but it's also a difficult one. As we climb that hill toward global affinity for the brand, we've had to look beyond traditional channels and traditional parts of the mix. We have to continue to educate. In some areas of the world, we have great awareness, preference, and consideration. Historically, Snapdragon has been known in Asia as the processor inside your smartphone making all that magic. But in the UK or the US, Snapdragon's brand is probably going to be built on our entry into the PC market. That, plus personal AI devices – we power pretty much all consumer AI glasses around the world, including Meta Ray-Bans and Meta Oakleys. We play a similar role in many AI-powered rings, watches, fitness bands, pins, and pendants. There's going to be a lot of exciting new releases across these spaces in the next 24–36 months – and without giving anything away, we're going to be powering most of them. So that's a huge opportunity for us. Ultimately, we're looking to tell the Snapdragon story across categories, whether it's your glasses, your phone, your car, your PC, or any new personal AI and wearable devices that might be in your future.

How can cultural relevance help Snapdragon accomplish this?

It lets you build connections where people already are. For instance, our strategic partnerships are very intentionally centred around passion points like sports, music, photography, and entertainment. Once you're in these cultural spaces, amazing things can happen. In a way, you're setting yourself up to get lucky – to take advantage of all these chance connections that culture affords. A perfect example is our front-of-kit partnership with Manchester United. It has delivered from a KPI perspective, as has all the content and storytelling we do around it. But because it's a piece of real estate that somebody wears, we've also benefitted from cultural moments that we couldn't strictly plan. For example, it's amazing when Sabrina Carpenter wears a jersey with your brand on it, and then posts it to her gazillions of followers. That's a cultural moment you didn't plan for, but by association you get to play a part in the moment – and that's phenomenal. Of course, there are also moments you can plan for. There are cultural moments every day, every week, every month that the world is engaging with – some of these you can anticipate and also engage with. For example, the World Cup is this year. The World Cup is a massive cultural experience for six billion of the eight billion people on this planet. How can we inject ourselves into that? You have to think along those lines.

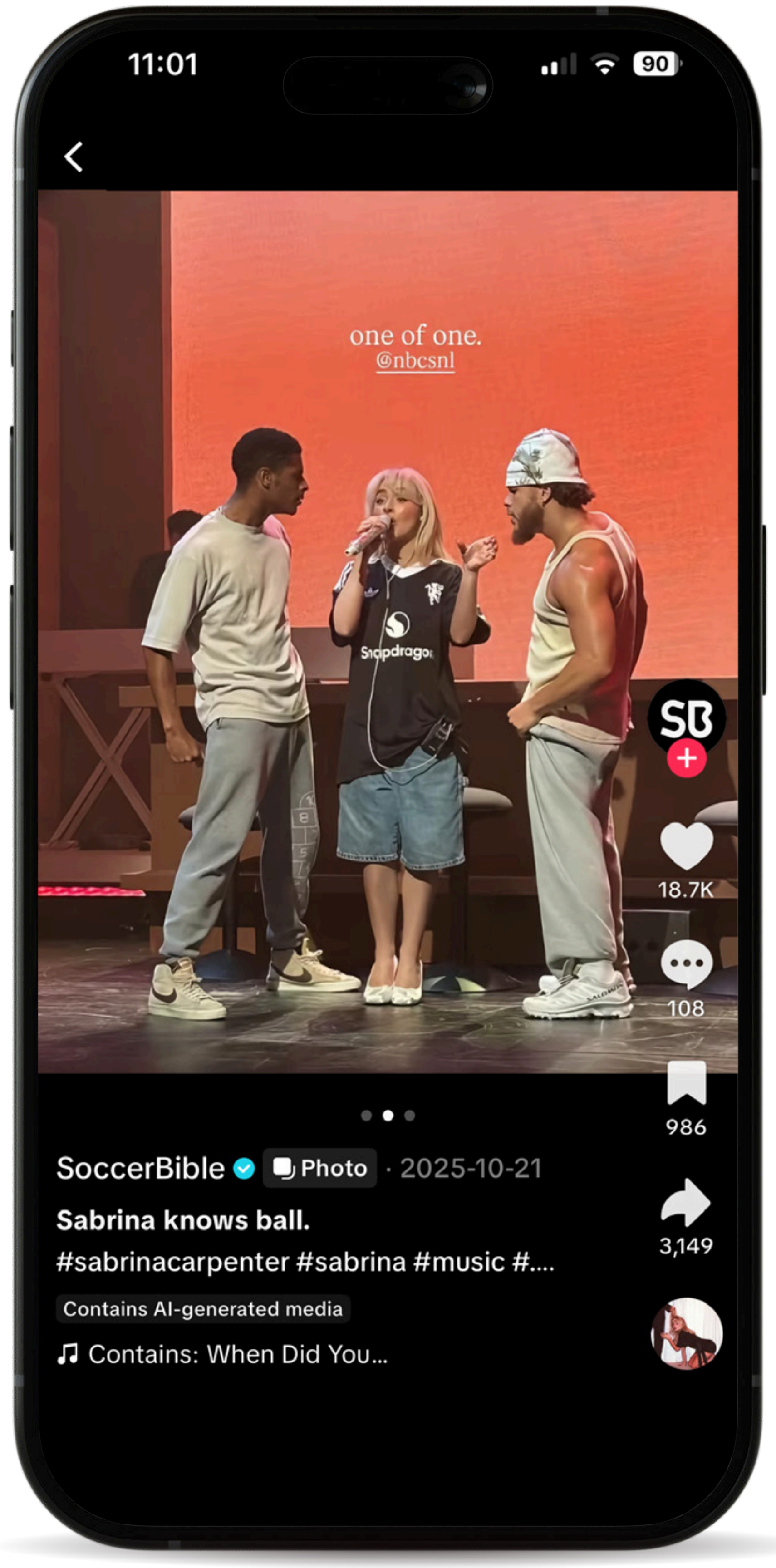


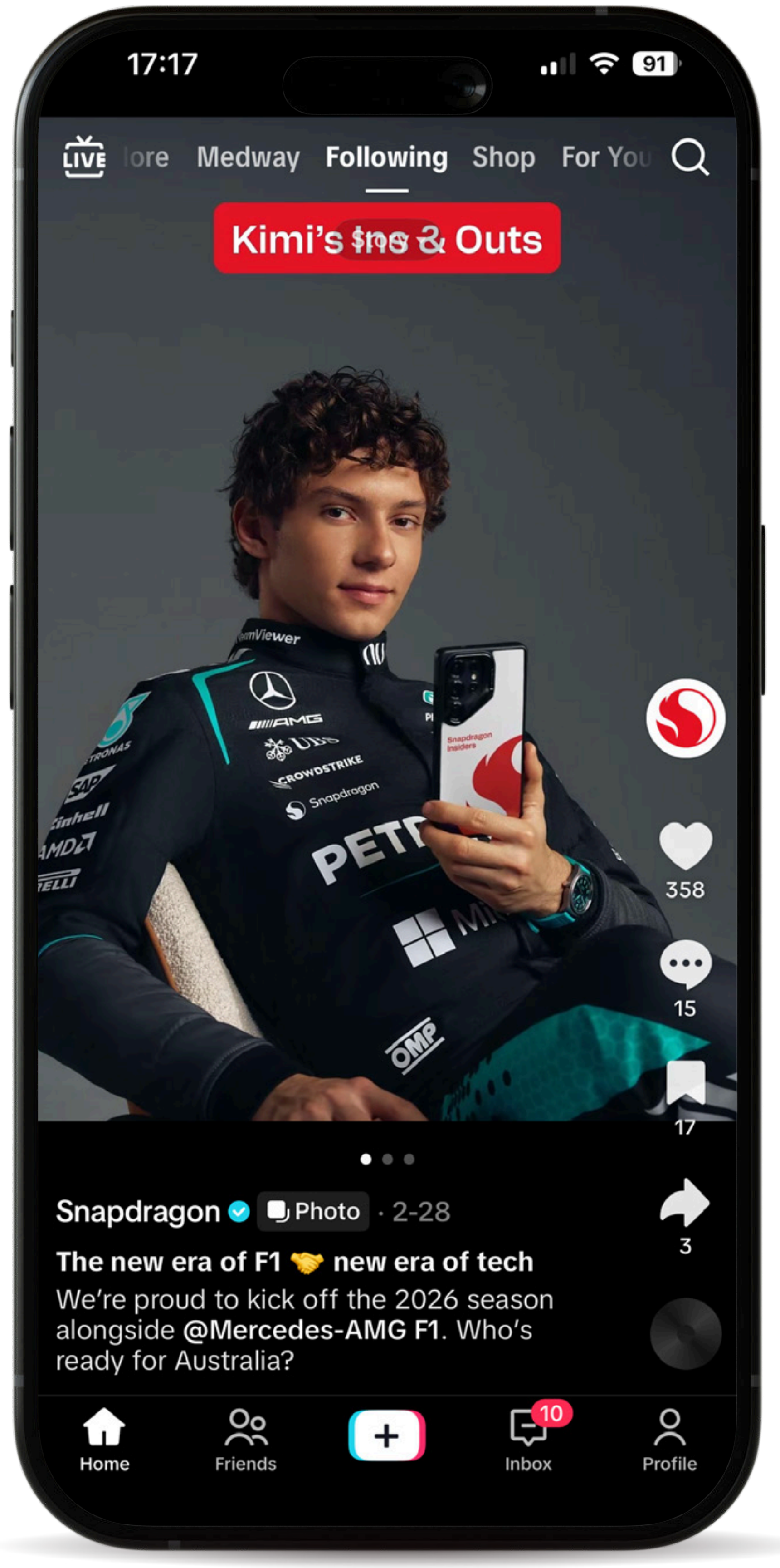
Don McGuire
EVP and Chief Marketing Officer
Qualcomm Incorporated

Another aspect of cultural relevance is community. We've built a community of Snapdragon Insiders. It's grown to over 20 million strong around the world. These are fans and followers who love talking about us and engaging with us. They help us tell our story. They advocate for the brand. By adding both partnerships and community into our marketing mix, we've been able to accelerate our KPIs tremendously.

What macro trends are you tracking as you consider the future of marketing?

One huge trend we've been looking at is the shift in search behaviour. The traditional paid search philosophy that marketers used to apply was: buy the top of the page. Buy those keywords and key terms, and you'll control the customer journey. But when even my 89-year-old mother is using ChatGPT as her search portal, a new day has clearly dawned. What's happening with these LLMs is that people are rarely leaving them. Instead, they're diving deeper and deeper within them to get more information. So how does your brand show up in a consistent, positive way in these environments? When you look at where these LLMs are getting their information from, they're scraping sources that are primarily not yours. They're sourcing from Reddit or LinkedIn or Twitch, from earned sources and organic conversations about your brand. So as you think about content delivery, and *where* you deliver that content, it's probably not going to be enough to deliver it on your own channels anymore. That brings me back to Snapdragon Insiders, and why it was so important for us to build a 20 million-strong community. Because now, with the advent of AI and people going to Perplexity or Gemini or ChatGPT, we can ignite our army of Insiders from a content and storytelling perspective. That way, as these LLMs are scraping for data to position you as a brand, they're getting the best information we can put out there: they're getting what our community is talking about.





Purpose means a lot of different things to brands. How does Snapdragon think about it?

We think about it in the context of becoming a cultural icon. We decided Snapdragon needs to have a soul beyond just delivering products. Which meant asking: How do we define ourselves beyond the amazing technologies we deliver to people every day? Also: How can we show up where really positive things are happening? A good example of this is our work with (RED), the private sector project raising awareness and funding for the global fight against health injustice. It was really well known 15 or 20 years ago for its special-edition product collaborations and its backing from figures like Bono. It's still a hugely important mission, and it's one that fits naturally with our work connecting people in remote places to healthcare providers through technology. We approached them and said that we wanted to bring (RED)'s platform to a whole new audience – by putting their brand on the most coveted piece of sports real estate in the world, which is the front of Manchester United's kit. We started doing that last season and built a whole content storytelling platform around it, with new opportunities for people to donate to and otherwise support the cause. The result was that (RED) returned to the cultural zeitgeist with amazing results among Gen Z, Gen Alpha, and young Millennials.

MICHAEL MANSKE
CHIEF BRAND, MARKETING & COMMUNICATIONS OFFICER, POLESTAR

Michael Manske joined Polestar in September 2024 from Volkswagen Group, where he was Head of Global Communications, Brand, and Marketing for its CARIAD software subsidiary. He has 10 years of experience in communications and journalism. Polestar is headquartered in Gothenburg, Sweden; its design-focused electric performance cars are now available in 28 markets worldwide.

View the full interview on:
Kantar BrandZ's YouTube playlist

When it comes to justifying marketing budgets, where do you think things stand today between marketing & communications executives and their CFOs?

There's certainly a history of misunderstanding there. If you, as a marketer, are not really data-driven, it can be hard to explain your activities. Many marketers were trained to work off gut feeling, and CFOs don't like gut feeling so much. They like numbers and Excel sheets.

Nowadays, though – certainly at Polestar – I can say that I *like* being challenged by our CFO. I *like* that there's pressure to show that my planned activities and investments are growing our business, in both the short and medium terms.

What's changed for the better is that we now have clear KPIs that allow us to demonstrate success. And CFOs love KPIs.

Of course some aspects of this aren't new. For a while now, with the rise of platforms like Google and Meta, it's possible to show returns on some kinds of digital media investment. But that's only part of the story, right?

For instance, because we're a young brand, our biggest investments are still in what you might call traditional advertising. Our first step *has* to be 'becoming more visible' – and that costs money.

And then we pursue a lot of partnerships as well, with an eye toward emotionalising our brand. Buying a premium car is expensive, which makes it an *emotional* decision. That's why partnerships like the one we have with Borussia Dortmund football club are so important. We're putting Polestar in the game, so to speak, in the midst of highly emotional global communities. Once there, we can highlight that we, as an EV brand, are very much part of car culture; that we're a performance brand driving right alongside legacy marques like Porsche, Ferrari, and Lamborghini.

So traditional media, partnerships – these also play a big role in lifting up our brand value. And now, with the right KPIs, we can prove how.

Michael Manske
Chief Brand, Marketing & Communications Officer
Polestar

What's the most significant lesson you've learned about building great brands?

The importance of differentiation. More relevant than ever, I think, especially in automotive. There are tons of new brands out there. The EV sector has been a real door-opener in this regard.

It's not enough in this environment to just buy reach. That traditional to-do list – buying reach, making your brand visible, maybe even putting it in a nice context – is not enough. You need to make your brand relevant and clear.

From the start, Polestar has done a strong job of this. We are Europe's only EV startup. We are all-in, despite headwinds. That puts us in quite a clear position.

Differentiation isn't just about defining yourself well early on, though. It's also about remaining bold enough to stay true to your brand.

There will always be the temptation to dilute your positioning. Geopolitical pressures, commercial pressures, financial pressures – all of these can understandably lead to strategic shifts. But you have to stay true to your brand pillars as you pivot. At Polestar, these are design, performance, and sustainability. We talk about them in almost every meeting, regardless of department.

What do you see as Polestar's primary job to be done from a brand perspective?

We have clearly-defined challenges. The first challenge is brand awareness. We need to make our brand much more famous. We have high brand awareness in our home turf of the Nordics, but as we range further afield – to points south or over oceans – it becomes more of a challenge.

Then, of course, there's the challenge of having clear differentiation. I think it's quite obvious that we are design-driven. You see it. The product shows it. But we need to do a better job demonstrating the performance side, to really explain the tech in our cars. Or better yet, have people experience it themselves. A big goal for us is to get people in our cars. It sounds easy, but as a young brand, when you don't have so many cars on the street – which is the biggest marketing asset you can have – you need to find other ways to get people in the car. From that point on, we're quite self-confident to be honest. We have a good conversion rate. Once we get you in the car, it's very likely that you buy a Polestar.

The third challenge is what we call the value perception gap. Of course, we are a premium manufacturer. That differentiates us from many new competitors. But to argue the price, you need to position your brand continuously on a premium level, and then explain to potential customers why they should be buying premium. That takes time.

We are on a journey across all three challenges. We have clearly defined KPIs for each of them, and we follow up on them every month.

What kind of behaviours do you think set the fastest-growing brands apart, and what lessons do you take from that for Polestar?

It's definitely speed. I see brands growing more and more cautious. And yes, there's a lot of uncertainty in the world. A lot of pressure. This causes marketers to fall back on what they learned years ago, and to prioritise strategies that can be easily presented to CFOs as 'safe bets'.

But the young brands, the fast-growing brands, are much bolder and much faster. They're much more open to new solutions from tech partners. They see no problem with just testing something, trying it out, learning, failing, and then moving on to the next possibility.

You also have to be curious and look at what others are doing. Most industries, automotive included, are very siloed. Very, very siloed. That's something I like about Polestar: we recruit people from so many different backgrounds – fashion industry, design. Our teams live all across the planet. And I think you can feel it. We have real creativity, and a strong visual language.

ZHOU YUNJIE
CHAIRMAN OF THE BOARD AND CEO HAIER GROUP

Haier

In July 1988, Mr. Zhou Yunjie graduated from Huazhong University of Science and Technology and joined Haier. In November 2021, he officially assumed the positions of Chairman of the Board of Directors and CEO of Haier Group.

Zhou Yunjie has successively received honorary titles such as the National Model Worker, the National May 1st Labor Medal, Special Contribution Award of the Management Science Award of the China Management Science Society, the Yuan Baohua Enterprise Management Gold Award, the National Outstanding Entrepreneur, the National Special Prize for Innovative Achievements in Modern Enterprise Management and the National Outstanding Quality Management Worker.

View the full interview on:
Kantar BrandZ's YouTube playlist

How is AI reshaping brand building? What core competitive changes has it brought?

I've always held the view that a brand lives in the hearts of users and in the hands of employees. Even in the AI era, the strongest brand power must always be rooted in people and serve people.

Brand competitiveness in this era comes from three aspects. First is the competitiveness of experience. The logic of brand competition has completely changed – we no longer think about what we want to sell, but what users need. So the core of a brand strategy is to transform the relationship with users from one-time transactions to nurturing, lifelong bonds.

Second is the human-centric appeal: technology should not be cold, and only when infused with human warmth can it truly lead. AI is meant to empower people, freeing them from repetitive work and letting human creativity return to the essence of serving people and caring for them.

Third is the ecosystem competitiveness: future competition will not lie in individual strength, but in the dynamism of the ecosystem. Since Haier entered the ecosystem brand strategy phase in 2019, we have always focused on the real economy and built six major industrial ecosystems: Smart Home Ecosystem, Comprehensive Healthcare Industry Ecosystem, Digital Economy Industry Ecosystem, Robotics Industry Ecosystem, New Energy Industry Ecosystem, and Automotive Industry Ecosystem. Our goal is to construct a self-regulating, intelligent living organism that innovates through mutual collaboration.

How does Haier establish a deeper cultural and emotional connection with consumers?

Emotional value is the moat for a brand's sustainable development, determining how deeply it embeds itself in users' minds. Without this moat, even the best products will inevitably fall into price wars. On the basis of integrating this dimension with functional value, Haier is exploring in two dimensions.

First, evolving from traditional hardware to smart home appliances to create a warm sense of companionship. The highest state of technology is 'invisibility', and the highest state of a brand is 'empathy'. Whether it's our newly launched AI Eye series or the Haiwa household service robot, Haier's smart home appliances are designed to make users feel understood and cared for in daily life, serving as an emotional bond between users and the brand.

Second, shifting from products to scenarios to deliver a new experience that is both practical and fulfilling. A single smart product is like an isolated functional unit; only when placed in a scenario can it form an 'oasis of life'. Haier provides users with complete smart home scenario solutions that are a joy to use, which is what we strive for.

Zhou Yunjie
Chairman of the Board and CEO
Haier Group

You've mentioned that the era of Globalisation 2.0 has arrived. What do you think are its core characteristics, and what does it mean for Haier's global strategy?

First, efficiency matters, but resilience matters more. Efficiency determines how fast an enterprise can run, while resilience determines how far it can go. In this second half of globalisation, staying stable may have more strategic value than running fast.

Second, the best globalisation is the deepest localisation. Of course, the prerequisite is to stimulate domestic demand and root ourselves firmly in the Chinese market. An enterprise cannot be robust if it fails in the Chinese market, and it can never become a strong brand if it only stays domestic.

Third, global capability is more important than global product sales. Exporting products is still a trade logic, but exporting capabilities is what entrepreneurs should really focus on – including independent brand building, product innovation, and supply chain capabilities. Haier has always kept pace with the times, growing into a globally competitive enterprise by balancing regional resilience and global synergy.

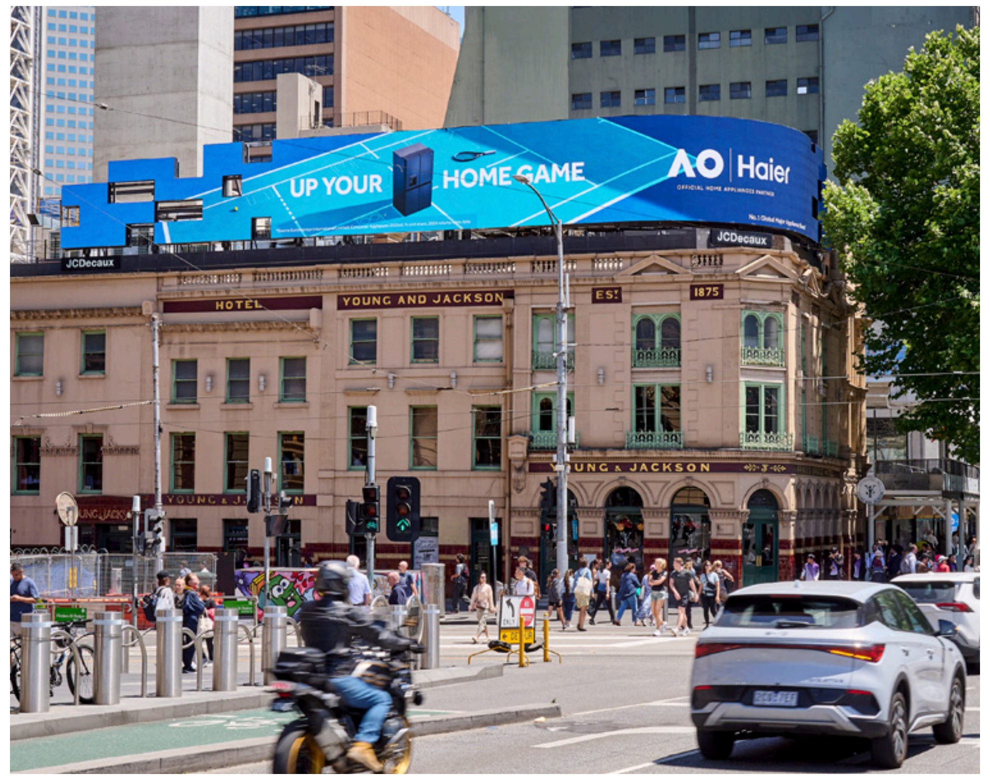
How can Chinese brands build values that are truly recognised by global users?

By fully respecting regional differences and moving users with product value and fostering long-term recognition through social responsibility. In the global market, Haier adheres to 'for the world, by the world' and deeply practices the ESG concept. In countries and regions along the Belt and Road, Haier's smart vaccine solutions have served more than 200 million children in 78 countries. In Europe, Haier has launched innovative products with energy saving of more than 60%.

The core of cultural resonance is realising the local expression of a global brand. Haier not only partners with top sports events and clubs worldwide, it also aligns with mainstream sports in different regions. This allows local users to see, recognise, and love Haier.

How do you view the relationship between humans and AI – is it a tool, a partner, or a new productive force?

AI is an amplifier that magnifies human value. Only when AI handles 99% of deterministic work can humans focus on the 1% of critical work that defines value. While modern AI is capable of forecasting the future, humans are better at understanding the unknown and achieving discontinuous innovation. AI makes the wheel of innovation turn faster, but the steering wheel is always in the hands of those with an entrepreneurial spirit.



As a symbiont, it builds a new human-AI integrated ecosystem. AI is a reflection of human intelligence; how we define AI is essentially how we redefine ourselves. I always joke: if you love AI, it will 'love' you back; if you resist it, it will 'resist' you. It's a symbiotic relationship of mutual evolution.

What advice do you have for young people, especially about the abilities and habits they need to cultivate in the AI era?

This is a tough question, because what I need most now is not to give advice to young people, but to receive it from them. We must always embrace the younger generation. Times have changed, and people's focus is different now. To stay vibrant and young, first you need to maintain the ability to 'reset yourself' proactively.

Academic qualifications represent the past; learning ability represents the future. Everyone should embrace the concept of lifelong learning, developing and achieving themselves through continuous learning.

Maintain the resolve for long-termism. Don't just focus on immediate gains and losses – your vision determines your future. Sometimes you need to endure loneliness, resist temptation, and be open to criticism. As long as you're on the right track, time is your best friend.

ESI EGGLESTON BRACEY
MARKETING LEADER

Esi Eggleston Bracey is a renowned consumer goods executive who has led some of the world's most iconic beauty and personal care brands. As Unilever's former Chief Growth and Marketing Officer, she spearheaded the company's transition into the next generation of marketing. Her prior roles include serving as President of Coty's Global Consumer Beauty Division and Senior Vice President of Procter & Gamble's Global Cosmetics.

View the full interview on:
Kantar BrandZ's YouTube playlist

What does it mean for brands to connect with people today?

The bar has been raised. To really stand out today, you have to move on from anticipating people's functional needs – and even their wants – to anticipating their desires.

Social has really changed the rules. People everywhere are exposed to luxury and to aspirational creators. It used to be that a person in rural India would be mostly connected to the people in their community, and focused on getting their day-to-day needs met. Today, that Indian villager might crave something they saw shared by a creator based in the US or the Middle East.

We desire more widely nowadays, which is another way to put it. And that desire is building brand power. It's earning some brand out there a premium. And eventually, that desire is causing market movements.

Not to mention the role desire plays on the other side – in inspiring those pieces of user-generated content, the ones that are finding their way to our Indian village. Desire is what makes creators write, film, talk, and post about brands in the first place.

It wasn't so long ago that functional claims ruled marketing in categories like personal care and home care. And functionality is still important, of course. But to deliver desire, you also have to look beyond function. It's the sensorials, it's the addictive experience of a product. It's the aesthetics: when people look at something you're offering and say, 'I just have to have that'. It's what others say about you. And it's how you radiate this feeling of being young at heart.

To ensure we keep *all* of these elements in mind, Unilever uses a framework called SASSY: 'Science that's superior', 'Aesthetics', 'Sensorials', 'Said or shared by others', and 'Young at heart'.

When we consider these factors, we don't limit ourselves to how they pertain to a lucky few. We're interested in the masses. We *all* yearn and desire, and we create brand value when we elevate and capture that desire.

How can CMOs have better conversations with their finance departments and CFOs?

It's about reframing things early on – with the CFO, but also with your marketing team. You can't think about your task as simply 'making the case for more marketing spend'. You have to reframe it as: 'Let's make sure we're investing for growth. How do we want to keep the brand and business growing?'

From there, you have to consider growth in the short, mid, and long term. Unilever uses Rapid ROI, which is an incredible tool that's able to measure those short- and mid-term impacts of investment across retailers and across channels. With it, you can really see how what we call 'traditional brand-building investment' converts to business growth, especially within that mid-term time frame.

Esi Eggleston Bracey
Marketing Leader

Can you share an example of how Unilever brands are staying close to culture?

One of my favourite Unilever brands is Vaseline. Vaseline has been around for over a hundred years, and it is more relevant today than ever.

Vaseline Petroleum Jelly is all about trust, not hype. Health, not hype. One way we've brought that to life is through a movement called Vaseline Verify. It was a Cannes Award Titanium Winner, and also a rockstar at conversion in the marketplace. During the period this content ran, we increased conversion at nearly 50%. That's the power of engaging with culture.

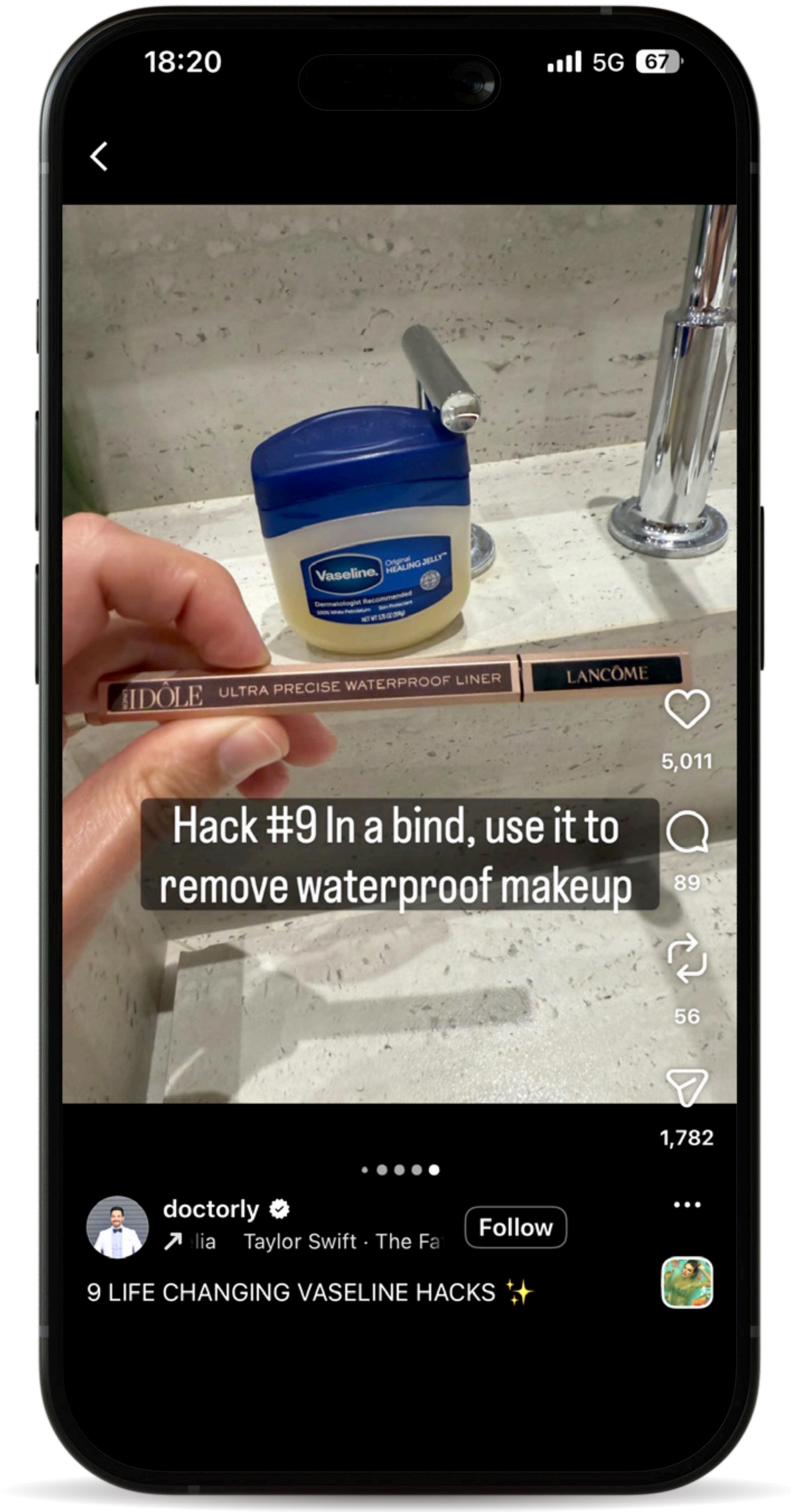
It started with seeing lots of stories from creators about how they liked to use Vaseline. The range of 'hacks' was incredible: Vaseline to remove plasters so they don't pull our hair; Vaseline to ensure a smoother shave; to make photographs look dreamier; to protect your lips from spicy foods. All these great tips – plus a few that were not so safe. Which is why we decided to have Vaseline scientists go in and verify which hacks we recommend and which we don't. We paired this with outreach to the original creators, giving them access to TikTok shops where they could earn from sales of Vaseline tied to their hacks.

What behaviours set the fastest-growing brands apart from the rest?

You have to be there. You can't miss a beat. You're there in the moments that matter to people and that are right for your brand: on-trend, in-culture, on-shelf. And when I say shelf, that includes the digital shelf, the physical shelf, and increasingly the agentic shelf. Through the LLMs, too, you have to be there.

The other thing is you have to move. You can't get too attached. You can't 'set it and forget it'. The behaviour is: you move. You invest in what's working and pull away quickly from what's not, ideally in real time. You have to do this kind of scan at least monthly. But in a lot of our categories, trends come and go in two weeks, or even quicker. So you have to be monitoring weekly, daily, in real time – and then making changes. And that's where AI really helps.

I'll add one last thing: you have to stay human. Great marketers don't get seduced by what they think are the creative possibilities with AI. It's not about brainstorming what you could do with the latest sexy tool. It's about falling in love with the business problem you have, and *then* leveraging AI to address that.



RESOURCES

KANTAR

Kantar is the world's leading marketing data and analytics business. We deliver the intelligence needed to power brand growth.

We provide the signals that help organisations act quickly and confidently. We empower brands to make effective marketing decisions based on predictive evidence. And we help them craft powerful growth strategies rooted in the connection between consumers, brands, and enterprise value.

All this is powered by our uniquely robust human and synthetic data, our unrivalled IP, our AI-native platform, and the team of global brand experts that bring this all together.

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Built on the Blueprint for Brand Growth and the externally validated Meaningful Different and Salient framework (MDS), Kantar's brand solutions empower marketers to make sharper, more agile decisions.

Decode equity, track performance in real time, and shape brand strategy with evidence. Get access to actionable insights, predictive metrics, and always-on signals to drive sustainable growth and lead with confidence.

For further information: **Brand Solutions**

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With special thanks and appreciation to:

Peter Aitken, Richard Ballard, Alvin Bowles, Mark Breen, Amy Cashman, Winnie Cheng, Andy Doyle, Ecem Erdem, Gonzalo Fuentes, Ed Gemmell, Jeff Greenspoon, Tara Gregson, Cheong Tai Leung, Wayne Levings, Claire Oxenham, Jane Ostler, Kristi Rogers, Josh Smith, Ty-Ahmad Taylor, Michael Uzielli, Doreen Wang, Paul Zwillenberg, Revolution Creative, and We Are Family

This project would not have been possible without the amazing support of:

Aaliah Alizadeh, Jon Andoni, Chandan Bhattacharjee, Adénis Bienfait, Marie Červenková, Deepak Chhabra, Anne Earles, David Edden, Himanshu Goel, Sebastian Hageneder, May Han, Arran Merriman, Olga Moreno, Kathleen O'Donnell, Andres Oliver, Simran Rainu, Rahul Sachdev, Vera Sidlova, Judit Stöckl, Pranjal Tiwari, Ambica Tyagi, and the DP and TaSc Teams in the Pune and Hyderabad GDC Hubs

Photography:

Getty Images

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THE KANTAR BRANDZ GLOBAL TEAM

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David Charles Walter

D.C. Walter is a Writer, Journalist, and Editor based in New York. He oversaw the writing, insights, and editing of the Kantar BrandZ Most Valuable Global Brands 2026 report.

KANTAR BRANDZ CONTACTS

The brand valuations in the *Kantar BrandZ Most Valuable Global Brands 2026* report are produced using the latest market data from Kantar, along with S&P Capital IQ and Euromonitor.

The consumer viewpoint is derived from the Kantar BrandZ database. Established in 1998 and constantly updated, this database of brand analytics and equity is the world's largest, containing 4.6 million consumer interviews and over 22,000 brands in over 54 markets.

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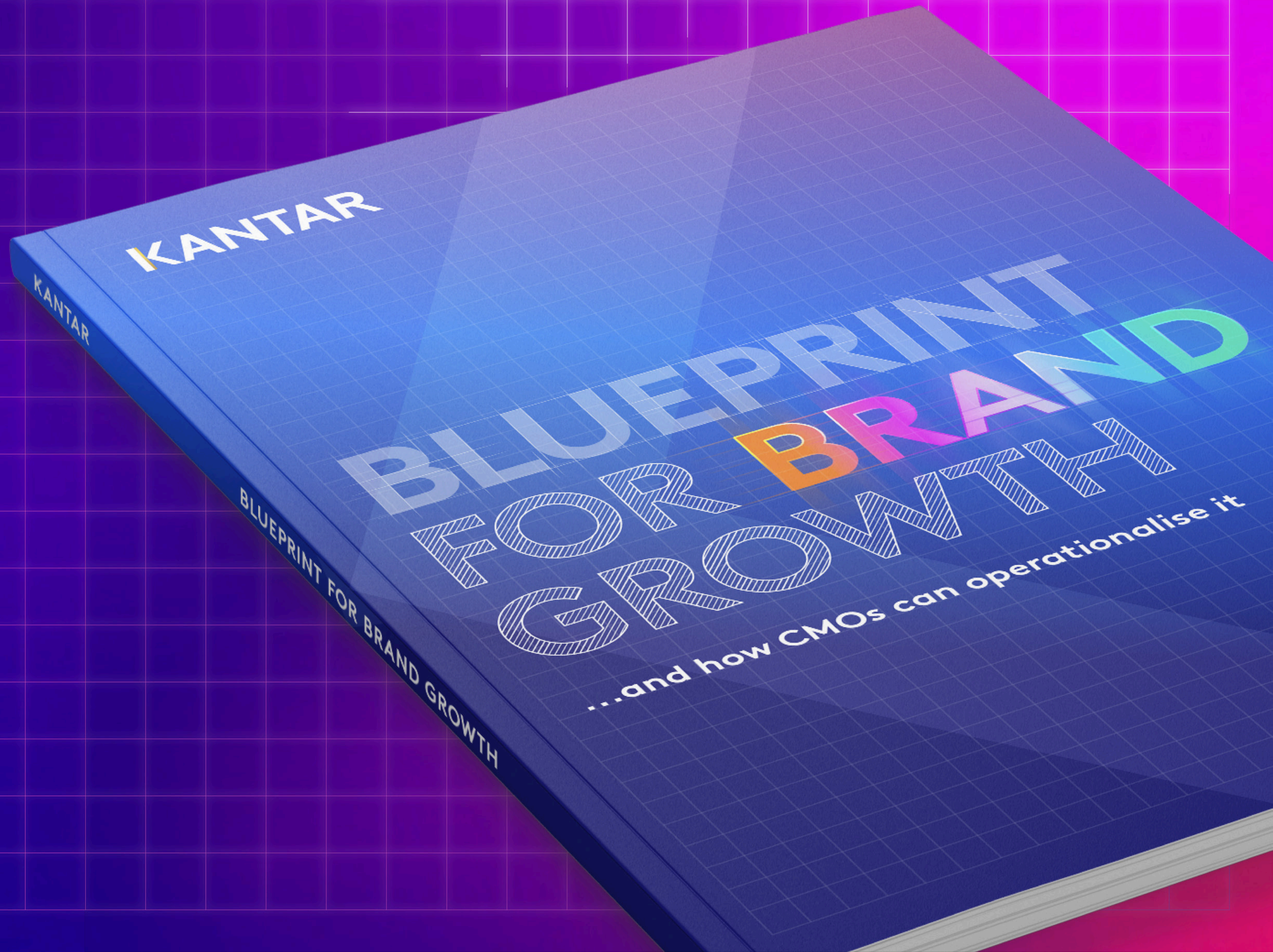

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2026 MOST VALUABLE GLOBAL BRANDS

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