



The American Chamber of Commerce in Shanghai
上海美国商会

Showcase

BrandZ Top 100 Most Valuable Chinese Companies

Marketing + Media Committee

Tuesday, Dec 8, 2020

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Manufacturing

**Marketing &
Media**

Real Estate &
Construction

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Tax

Technology & Innovation

Women's Executive
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21 Industry Committees

Our Purpose

Focus on Business,
Marketing and
Media Issues

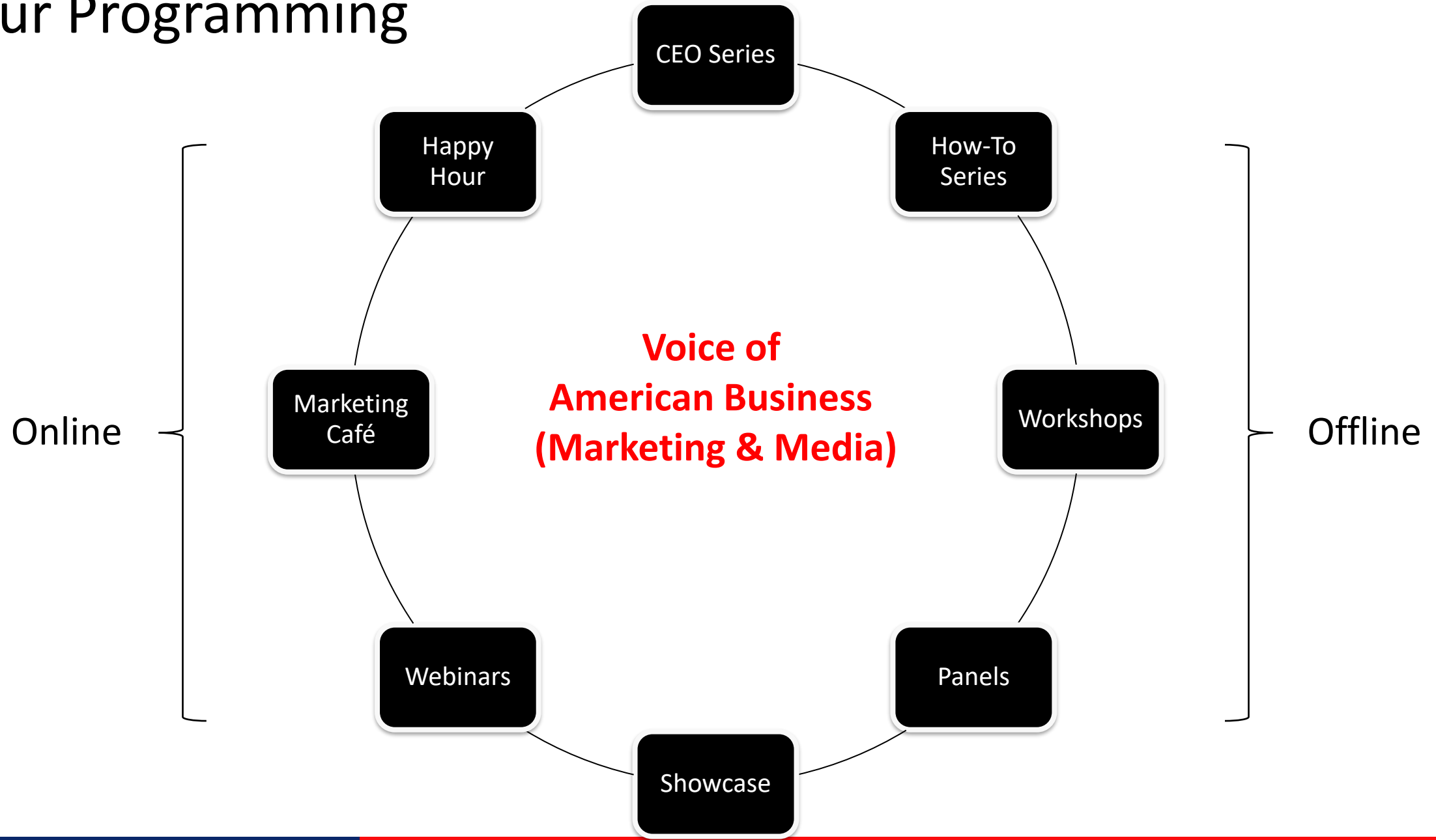
Provide a forum to
learn, debate and
network

Leverage the
experience of
Members



Voice of American Business
(Marketing & Media)

Our Programming



Marketing Committee Group

Follow Us on WeChat

Latest Reports, Trends and Events.

Group has over 200 people, so add me
and I will add you into the Group.

* If you are in Group 1, you DO NOT need to be in Group 2.
They are the same.



Paul 

WeChat ID: **PaulLin123**



Scan the QR code to add me on WeChat

Today's Speaker



Doreen Wang

CEO Kantar China
Global Head of BrandZ

- Doreen Wang is a seasoned executive with extensive experience in brand research and strategic consulting services for senior executives in Fortune 500 Companies in both China and the U.S. Doreen has helped many global companies and fast-growing Chinese brands on their brand strategy and growth plans.
- Doreen is being regarded as one of the most trustworthy and forward-looking branding experts worldwide.
- Doreen currently leads the global BrandZ™ engagement across 51 countries, and the launch of BrandZ™ Global Top 100 Most Valuable Brands.
- She returned to Beijing in January 2020 from New York.

How to Build Strong Resilient Brands in the Post-Pandemic World?

Lessons Learned from 2020 Global and Chinese Top 100 Brands

Prepared for

AmCham

WPP

KANTAR

凯度是全球顶级的**市场研究与策略咨询机构**，
为世界五百强企业长期合作伙伴实现业务、品牌双增长。

WPP



BainCapital

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凯度集团在83个国家拥有
28000名分析师和咨询师

服务**92%**全球财富
500强企业

大客户中85%都和我们
合作超过了**20年**

BrandZ 2020 全球100强榜单

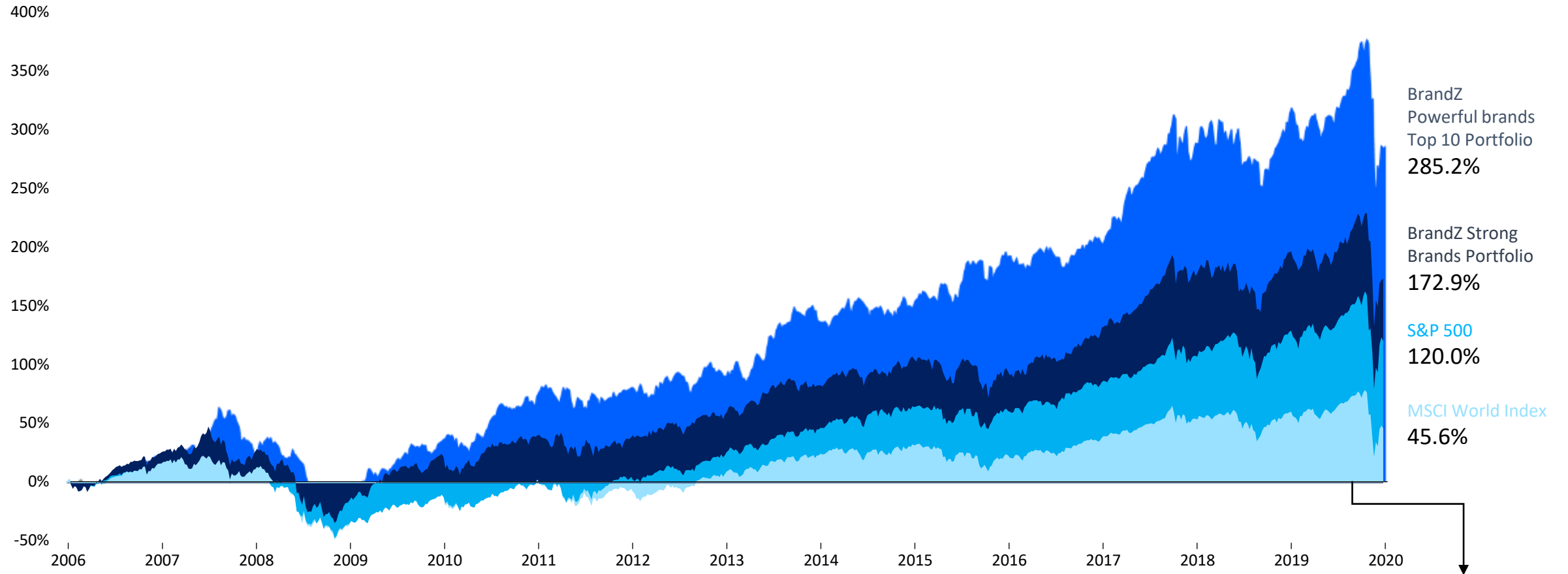


1	Amazon	18	Moutai	34	Chanel	51	Cisco	67	HSBC	84	Aldi
2	Apple	19	Louis Vuitton	35	Adobe	52	JD	68	Haier	85	Uber
3	Microsoft	20	UPS	36	China Mobile	53	Budweiser	69	Agricultural Bank of China	86	UnitedHealthcare
4	Google	21	Nike	37	YouTube	54	Meituan	70	Pampers	87	Citi
5	Visa	22	Disney	38	Ping An	55	Vodafone	71	Dell Technologies	88	FedEx
6	Alibaba	23	PayPal	39	Hermès	56	Mercedes-Benz	72	IKEA	89	Gillette
7	Tencent	24	Starbucks	40	Samsung	57	Zara	73	AIA	90	BCA
8	Facebook	25	XFINITY	41	Salesforce	58	China Construction Bank	74	J.P. Morgan	91	Baidu
9	McDonald's	26	Netflix	42	Wells Fargo	59	HDFC Bank	75	LIC	92	Adidas
10	Mastercard	27	Walmart	43	LinkedIn	60	RBC	76	Colgate	93	DHL
11	AT&T	28	Spectrum	44	L'Oréal Paris	61	BMW	77	TD	94	Siemens
12	Verizon	29	Instagram	45	Huawei	62	Chase	78	Bank of America	95	Subway
13	Coca-Cola	30	Accenture	46	American Express	63	NTT	79	TikTok	96	Lowe's
14	IBM	31	ICBC	47	Costco	64	Didi Chuxing	80	Movistar	97	Bank of China
15	Marlboro	32	Deutsche Telekom	48	Toyota	65	Xbox	81	Xiaomi	98	Lancôme
16	The Home Depot	33	Intel	49	Gucci	66	Orange	82	KFC	99	Pepsi
17	SAP	34	Chanel	50	Oracle			83	Shell	100	Commonwealth Bank of Australia

BrandZ strong brand portfolios continue to out-perform the market



BrandZ™ Portfolios vs S&P 500 vs MSCI World (April 2006 - April 2020)



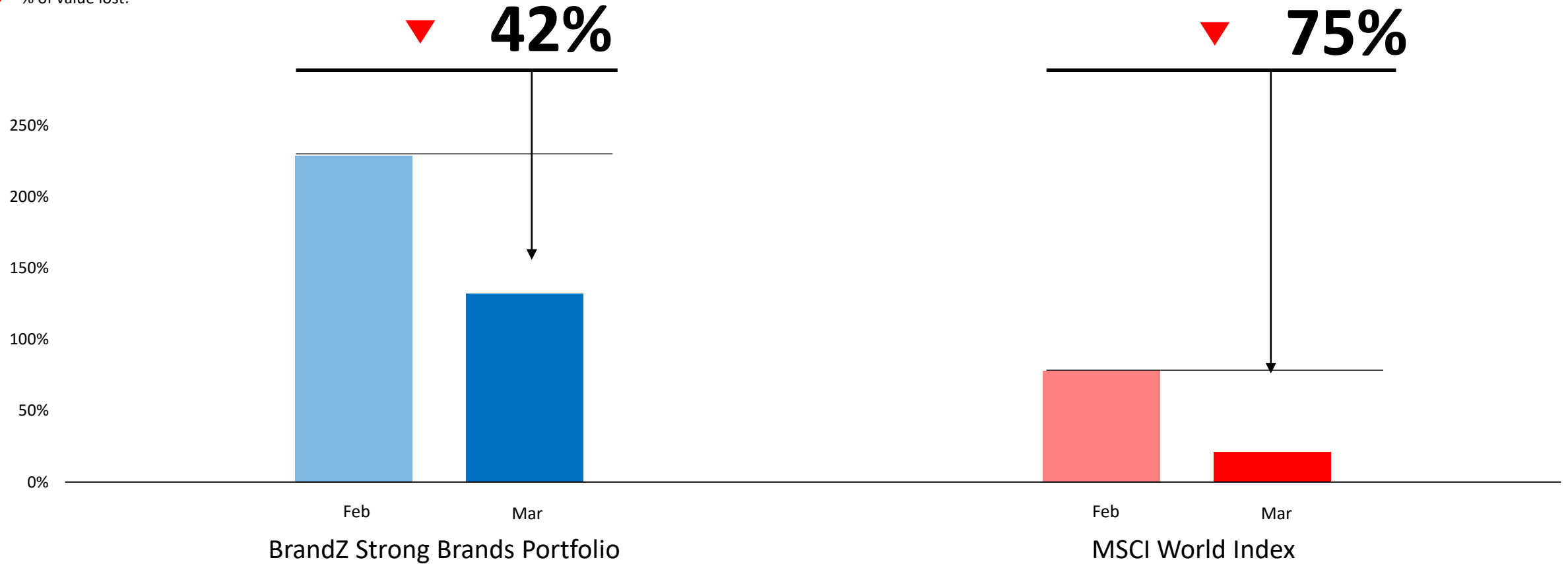
More detail of 2020 declines on next slide

When turbulence drives, markets down, strong brands decline more slowly

BrandZ portfolios vs. S&P500 and MSCI World: 14 February to 20 March 2020, indexed on April 2006



▼ % of value lost:



The changed Top 10



2006



中国移动
China Mobile



2020



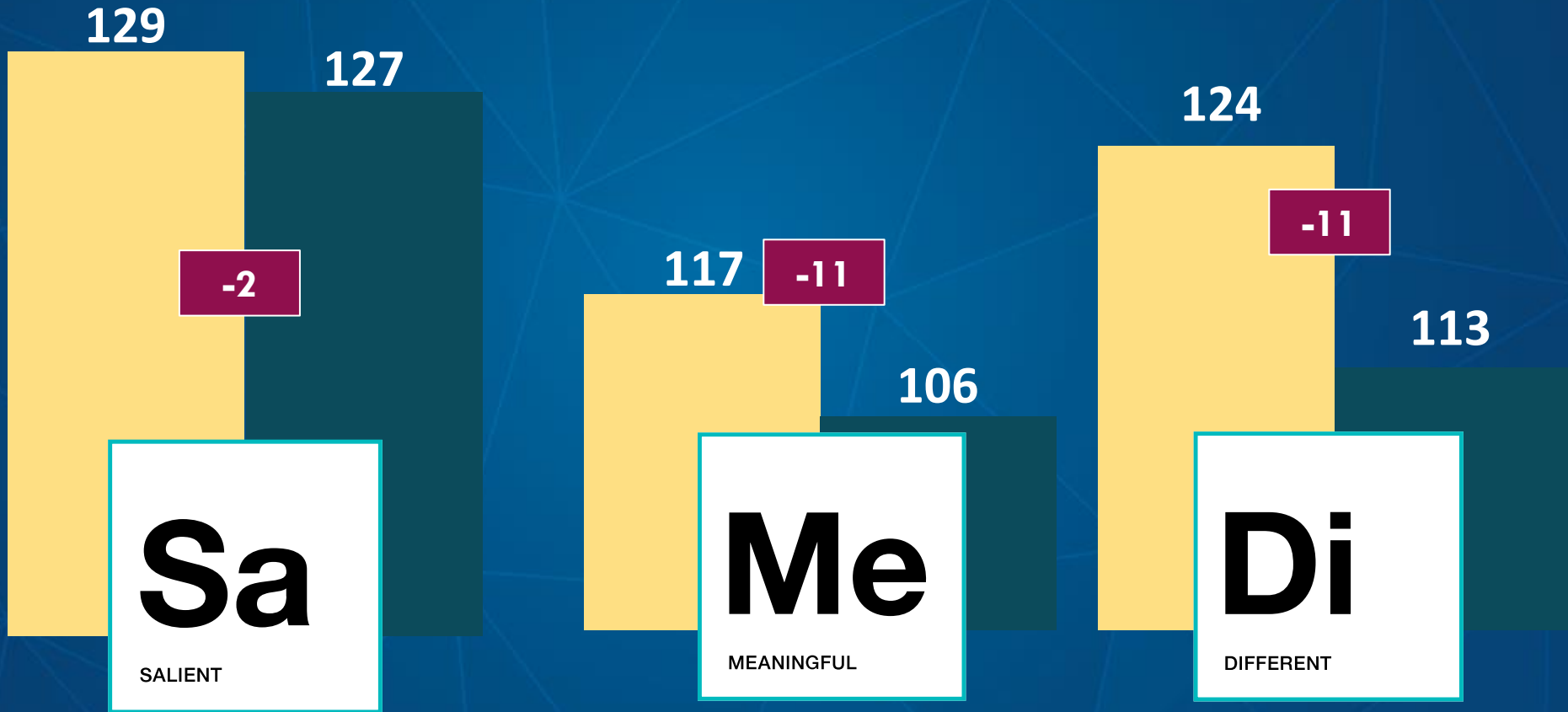
How many brands have been displaced among the Global Top100 since 2006?

52

Dropouts lack Meaning and Difference



■ Top 100 2018
■ Dropouts



Chinese Brands support
the China Dream

中国品牌助力中国梦

BRANDZ
TOP100
Most Valuable
Chinese Brands
最具价值中国品牌100强
2020

10 Years
十年

WPP

BRANDZ™

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2020年BrandZ™中国最具价值品牌100强

BRANDZ
TOP 100
Most Valuable
Chinese Brands
最具价值中国品牌100强
2020

品牌	品类	品牌价值 百万美元	2019到2020年品牌 价值变化%
1 阿里巴巴	零售	153,287	9%
2 腾讯	科技	150,978	9%
3 茅台	酒类	53,755	47%
4 中国工商银行	银行	38,149	-6%
5 华为	科技	37,998	13%
6 中国移动	电信服务	34,583	-12%
7 中国平安	保险	33,810	25%
8 京东	零售	24,761	17%
9 美团	生活服务平台	23,911	20%
10 中国建设银行	银行	21,089	-8%
11 滴滴出行	出行服务	20,041	0%
12 海尔	物联网生态	18,713	15%
13 中国农业银行	银行	18,639	3%
14 抖音	文化娱乐	16,878	新上榜
15 小米	科技	16,644	-19%
16 百度	科技	14,840	-44%
17 中国银行	银行	13,686	5%
18 中国人寿	保险	12,734	7%
19 陆金所	消费金融	12,435	80%
20 顺丰速运	物流	11,466	-16%
21 招商银行	银行	11,337	16%
22 饿了么	生活服务平台	9,908	36%
23 拼多多	零售	9,485	新上榜
24 伊利	饮料	9,203	2%
25 快手	文化娱乐	8,551	新上榜

品牌	品类	品牌价值 百万美元	2019到2020年品牌 价值变化%
26 五粮液	酒类	8,034	116%
27 中国石油化工(中石化)	能源	7,467	-30%
28 中国电信	电信服务	7,084	-12%
29 恒大地产	房地产	7,062	2%
30 中国石油天然气(中石油)	能源	6,878	-27%
31 蒙牛	饮料	6,831	1%
32 爱奇艺	文化娱乐	6,587	17%
33 美的	家电	5,914	26%
34 网易	科技	5,378	41%
35 优酷	文化娱乐	4,965	0%
36 新东方	教育	4,862	78%
37 格力	家电	4,847	20%
38 学而思	教育	4,596	120%
39 万科地产	房地产	4,537	10%
40 交通银行	银行	4,455	-7%
41 中通快递	物流	4,384	31%
42 大众点评	生活服务平台	4,313	12%
43 中国国际航空	旅游服务	4,271	-14%
44 太平洋保险	保险	4,179	-18%
45 双汇	食品	3,916	38%
46 碧桂园	房地产	3,871	16%
47 大疆	科技	3,808	36%
48 贝壳找房	地产中介	3,741	新上榜
49 用友	科技	3,710	新上榜
50 保利地产	房地产	3,456	20%

品牌	品类	品牌价值 百万美元	2019到2020年品牌 价值变化%
51 苏宁	零售	3,401	-10%
52 中国联通	电信服务	3,050	-25%
53 携程	旅游服务	3,002	-2%
54 联想	科技	2,974	3%
55 中国民生银行	银行	2,958	10%
56 云南白药	医疗保健	2,946	2%
57 中国东方航空	旅游服务	2,901	-11%
58 融创	房地产	2,812	34%
59 比亚迪	汽车	2,642	18%
60 洋河	酒类	2,536	-11%
61 哔哩哔哩	文化娱乐	2,535	50%
62 韵达速递	物流	2,511	-8%
63 中国南方航空	旅游服务	2,473	-6%
64 国窖1573	酒类	2,394	68%
65 泸州老窖	酒类	2,287	39%
66 链家	地产中介	2,272	新上榜
67 今日头条	科技	2,259	新上榜
68 华润置地	房地产	2,234	新上榜
69 中兴	科技	2,188	77%
70 唯品会	零售	2,146	40%
71 自如	地产中介	2,068	新上榜
72 中国人民保险	保险	1,950	-17%
73 雪花啤酒	酒类	1,900	5%
74 龙湖地产	房地产	1,814	56%
75 58同城	生活服务平台	1,667	新上榜

品牌	品类	品牌价值 百万美元	2019到2020年品牌 价值变化%
76 同仁堂	医疗保健	1,589	-19%
77 苏泊尔	家电	1,572	53%
78 新华保险	保险	1,548	-21%
79 京东方	科技	1,547	新上榜
80 安踏	服饰	1,534	56%
81 青岛啤酒	酒类	1,450	8%
82 中信银行	银行	1,382	-13%
83 圆通速递	物流	1,334	-28%
84 VIPKID	教育	1,256	67%
85 永辉超市	零售	1,212	15%
86 汉庭酒店	旅游服务	1,133	7%
87 古井贡酒	酒类	1,122	40%
88 哈尔滨啤酒	酒类	1,092	-4%
89 华润三九	医疗保健	1,085	13%
90 申通快递	物流	1,062	-23%
91 知乎	科技	1,035	新上榜
92 魅族	科技	1,026	-1%
93 老板	家电	948	-9%
94 杏花村	酒类	924	新上榜
95 世茂房地产	房地产	917	35%
96 优必选	科技	910	0%
97 大宝	个人护理	868	-12%
98 金蝶	科技	862	新上榜
99 李宁	服饰	848	新上榜
100 金地集团	房地产	815	新上榜

10 Years
十年

BRANDZ
TOP100
Most Valuable
Chinese Brands
最具价值中国品牌100强
2020

Transformation altering the brand landscape

中国品牌格局改天换地

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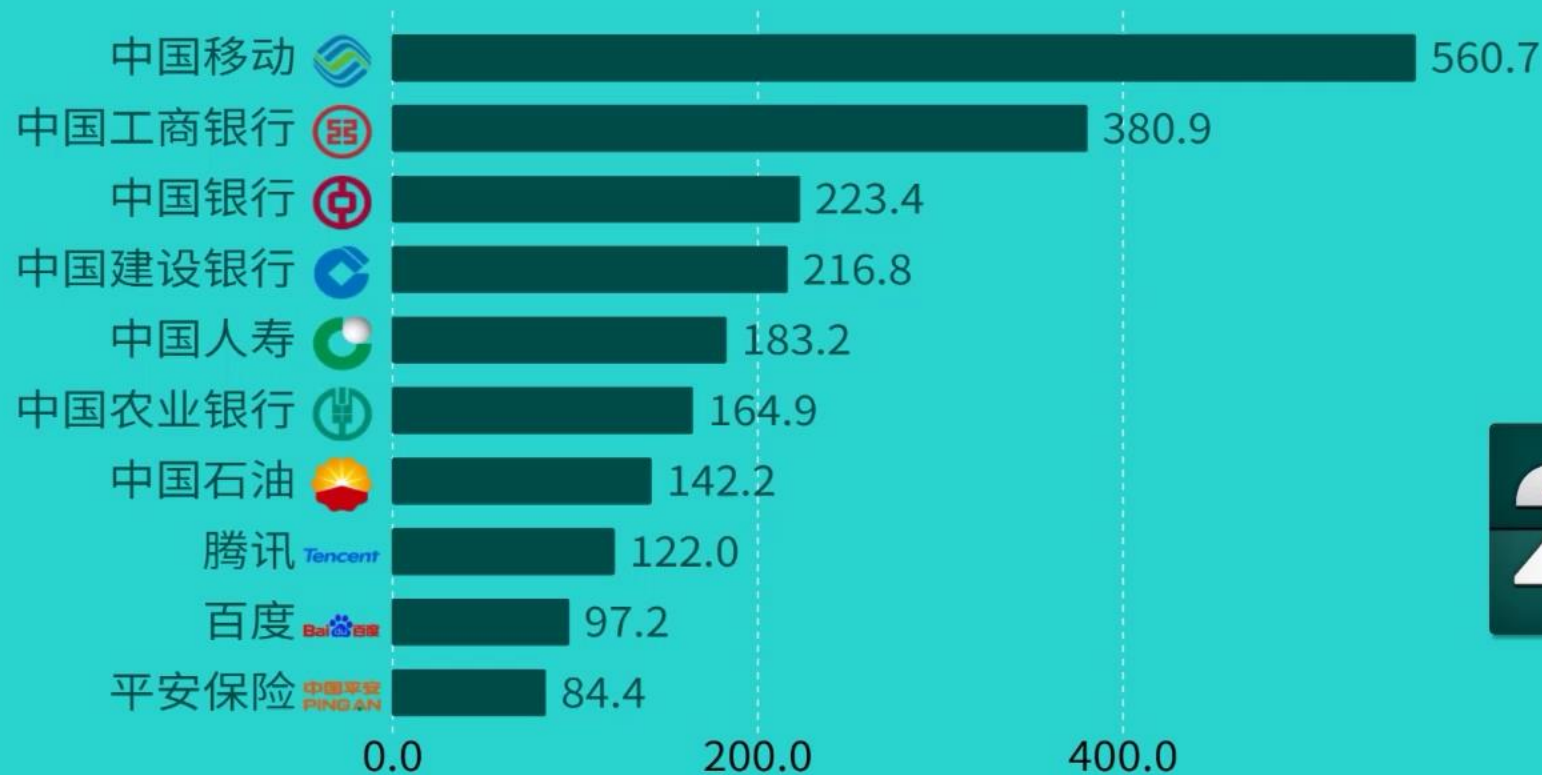
BrandZ™最具价值十大中国品牌十年间风起云涌

BRANDZ™
TOP 100
Most Valuable
Chinese Brands
最具价值中国品牌100强
2020
WPP KANTAR



单位：亿美元

数据来源：BrandZ™最具价值全球品牌100强排行榜 2011年-2020年



2011

BRANDZ
TOP100
Most Valuable
Chinese Brands
最具价值中国品牌100强
2020

Year 2020 站在当下

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2020 COVID-19 + 2020 疫情 +

Slowing economic growth, aging population,
and intensifying China-US tensions

面临经济增长放缓
人口老龄化和中美紧张加剧

Pride vs. Pragmatism 自豪 vs. 务实

Chinese feel pride, but shop for value
民族复兴，物有所值

BRANDZ
TOP 100
Most Valuable
Chinese Brands
最具价值中国品牌100强

2020

Health vs. Indulgence 健康 vs. 享乐

Healthy life and indulge self
要健康生活，也要犒劳自己

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New vs. Old

新 vs. 老

New brands emerge, old brands resurge

新品牌崛起，老品牌复兴

Young vs. Old 年轻人 vs. 银发族

GenZ consumers, and grandparents
同时瞄准Z世代消费者和他们的祖辈

Trading Up vs. Trading Down

消费升级 vs. 消费降级

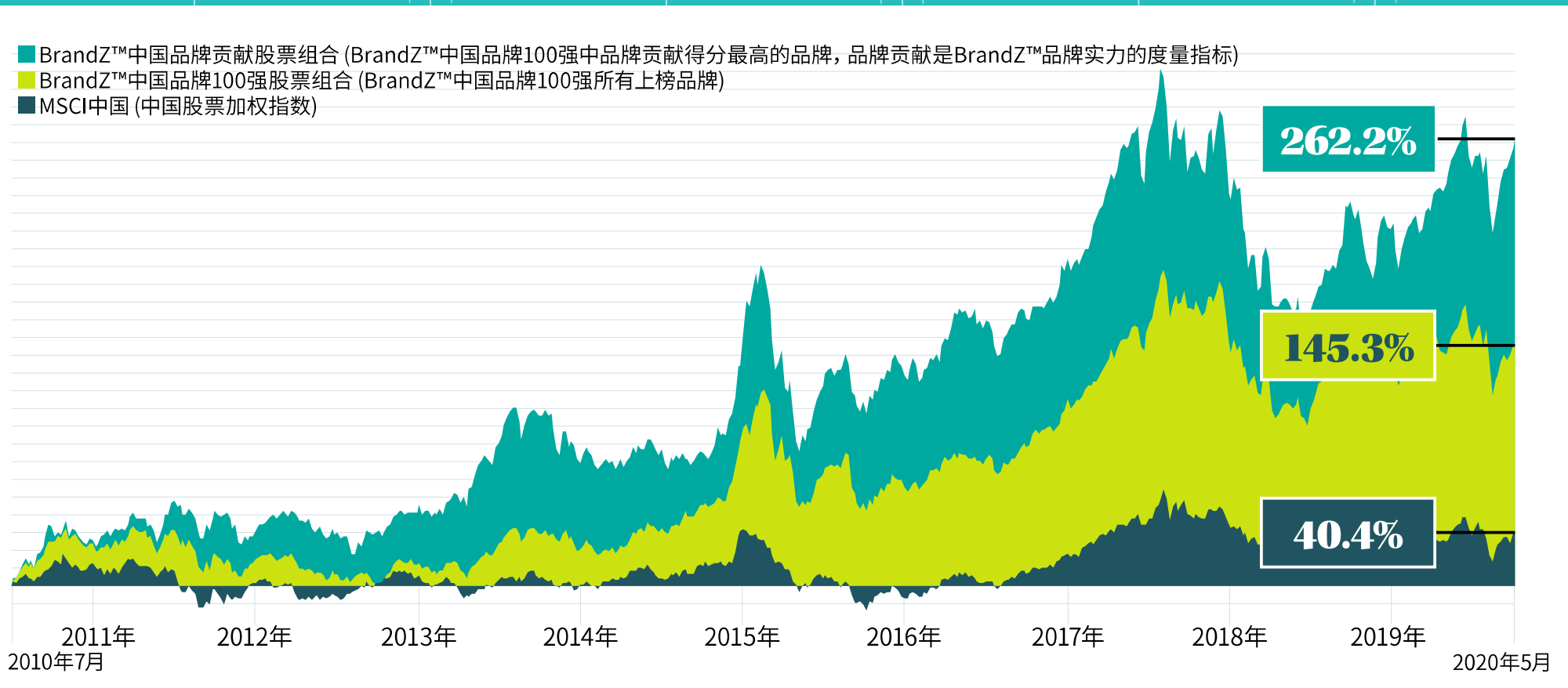
Shoppers seek bargains, and premium product

“口红效应”已延伸到更多品类

Even in Stressful Times, Valuable Brands Deliver Superior Returns

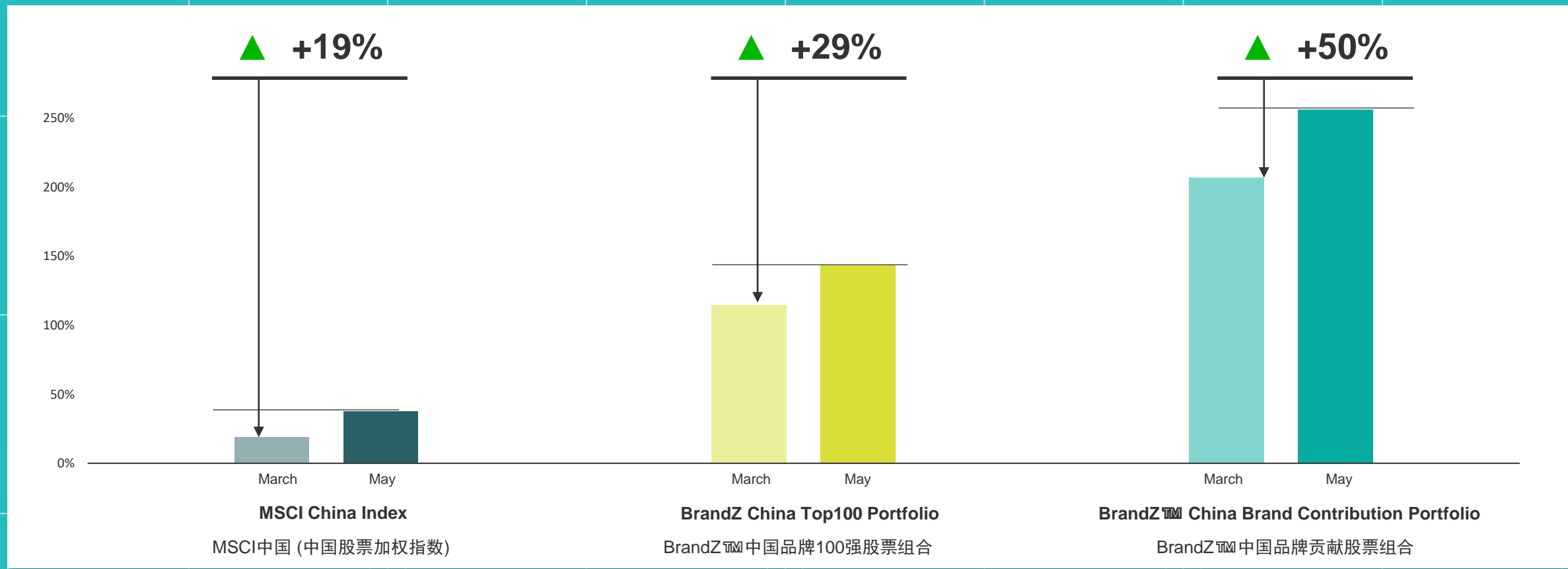
重压之下，强品牌仍然能为股东带来丰厚回报

- BrandZ™中国品牌贡献股票组合 (BrandZ™中国品牌100强中品牌贡献得分最高的品牌, 品牌贡献是BrandZ™品牌实力的度量指标)
- BrandZ™中国品牌100强股票组合 (BrandZ™中国品牌100强所有上榜品牌)
- MSCI中国 (中国股票加权指数)



Valuable brands rebound faster 强品牌更快速的反弹

Percentage points changes from bottom to May
从3月最低点到五月的增长百分比的差值



Lessons to Build Resilient Brand in Post-Pandemic Era

后疫情时代打造坚韧品牌 的核心功课

A decade of brand insights
and analysis illuminates paths for future growth

十年的品牌洞察和咨询
为我们照亮未来

Lesson 1

Justified Premiumization Drives Value Growth

溢价能力是成就强品牌的主要驱动因素

BRANDZ
TOP100
Most Valuable
Chinese Brands
最具价值中国品牌100强
2020

From Traffic Growth
to Branding Growth

从流量型增长
到品牌性增长

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2020年品牌价值：
538亿美元
+47%



BRANDZ
TOP 100
Most Valuable
Chinese Brands
最具价值中国品牌100强
— 2020 —

Brand Value Growth
% over 6 years
品牌价值6年增长

1.8 ×



Brands with Low
Premium index

低溢价力品牌



Brands with High
Premium index

高溢价力品牌

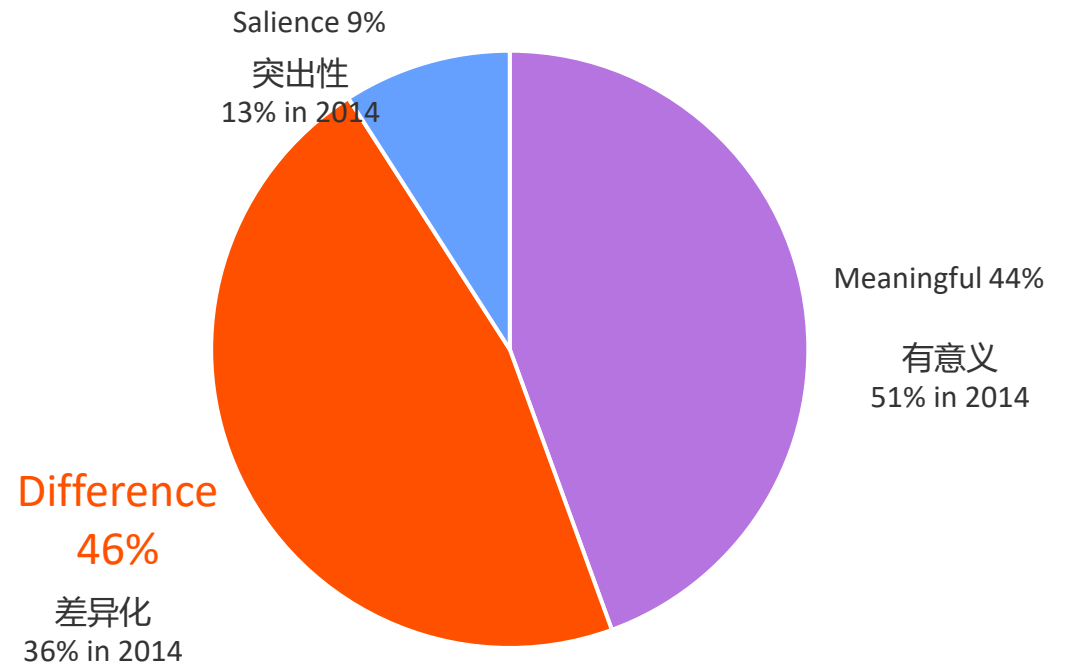
Among survivor from 2014 to 2020



Difference is the key driver
of Premium

差异化成为拉动溢价能力 越来越重要的驱动力

BRANDZ
TOP 100
Most Valuable
Chinese Brands
最具价值中国品牌100强
— 2020 —

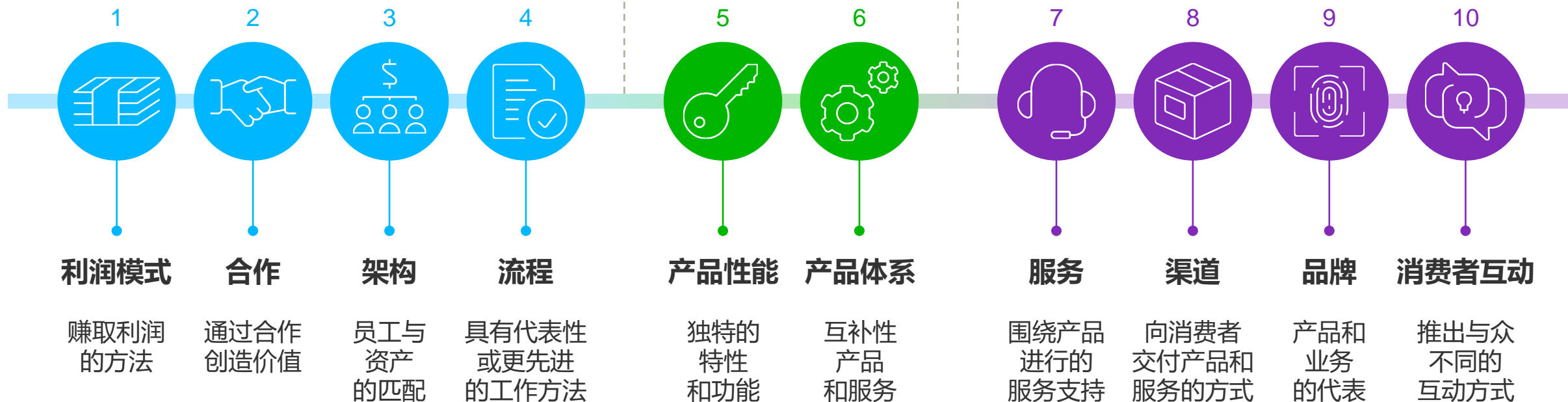


实现品牌高溢价能力需要全链路创新

配置 (业务模式)

产品

体验



Lesson 2

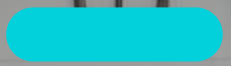
Delivering Superior Brand Experience Drives
Value Growth

体验迭代优化
驱动品牌价值提升



产品品牌

Product brand



场景品牌

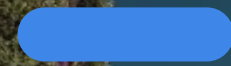
Occasion brand



BRANDZ
TOP 100
Most Valuable
Chinese Brands
最具价值中国品牌100强
2020

生态品牌

Ecosystem brand



Product Brand Mass Individualization 产品品牌 大规模定制体验

中学而思

BRANDZ
TOP100
Most Valuable
Chinese Brands
最具价值中国品牌100强
2020



2020年品牌价值：
46亿美元
+120%



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Occasion Brand

Owning Distinct Territory

场景品牌

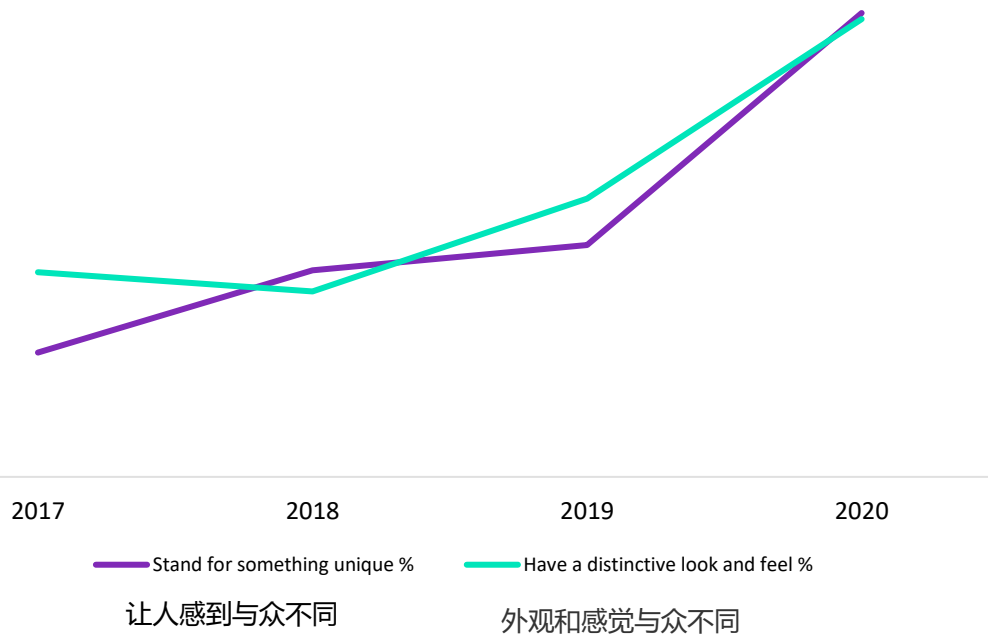
拥有核心场景，创造体验迭加

B站
2020年品牌价值：
25亿美元
+50%



BRANDZ
TOP 100
Most Valuable
Chinese Brands
最具价值中国品牌100强
2020

From ACG to Wikipedia among youth
从二次元到年轻人的“百科全书”



Among survivor from 2014 to 2020

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Ecosystem Brand 生态品牌

BRANDZ
TOP 100
Most Valuable
Chinese Brands
最具价值中国品牌100强
2020

A new brand paradigm that encourages the co-creation among brands, users and partners to provide unbounded and continuously iterative integrated value experiences

海尔
2020年品牌价值
187亿美元

生态品牌是通过与用户、合作伙伴联合共创，不断提供无界且持续迭代的整体价值体验，最终实现终身用户及生态各方共赢共生。

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Lesson 3

Balance Brand Building and Activation

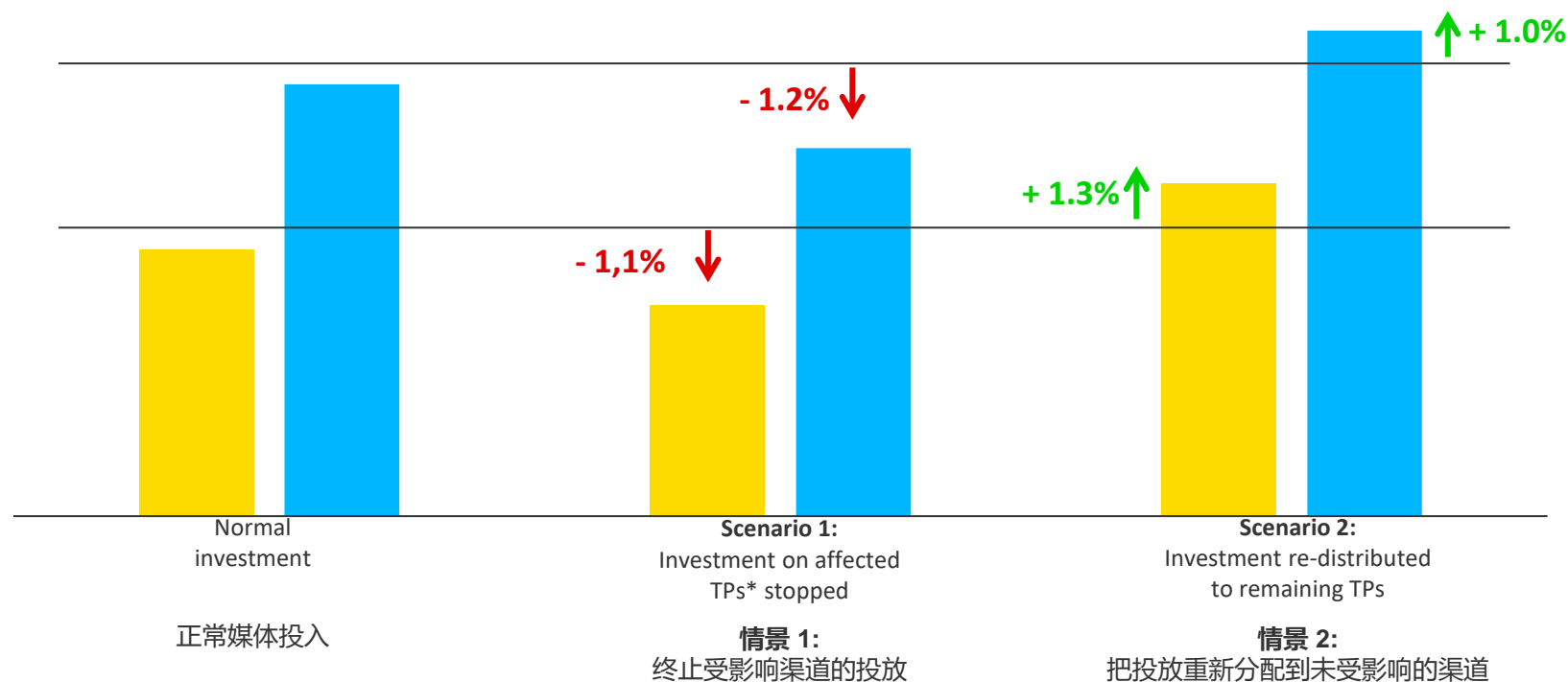
短中长期平衡的投放策略

Balance brand building and activation to drive both short-term and long-term sales



Re-allocating budget to more efficient channels can increase impact

将预算重新分配到更有效的渠道 可以放大营销效果



以内容营销为主的社交媒体传播，结合核心生活场景为主的线下传播是赢得品牌价值提升的两大传播趋势

Online social media communication based on content marketing, combined with frequent offline communication based on core life scenes, are two major communication trends to win the promotion of brand value

内容营销 Content marketing



以微信、微博、抖音、小红书、
B站为代表的手机App

Mobile phone applications such as Wechat, Weibo, Tiktok, and Bilibili

场景营销 Occasion-based marketing



以分众为代表的公寓楼、
写字楼、商场影院媒体

Apartment, office building, mall and cinema media

HOW TO EXPEDITE DIGITALIZATION AND OMNI-CHANNEL IMPLEMENTATION

如何加速数字化转型和执行全渠道策略

Lesson 4

Back to the Basics:
Purpose, Reputation, Trust

夯实根基：
品牌理想、声誉、信任

Brands are Entering the Era of the Public

品牌进入公众时代

Purpose in China links with The China Dream

践行品牌理想 紧扣中国梦

BRANDZ
TOP100
Most Valuable
Chinese Brands
最具价值中国品牌100强
2020

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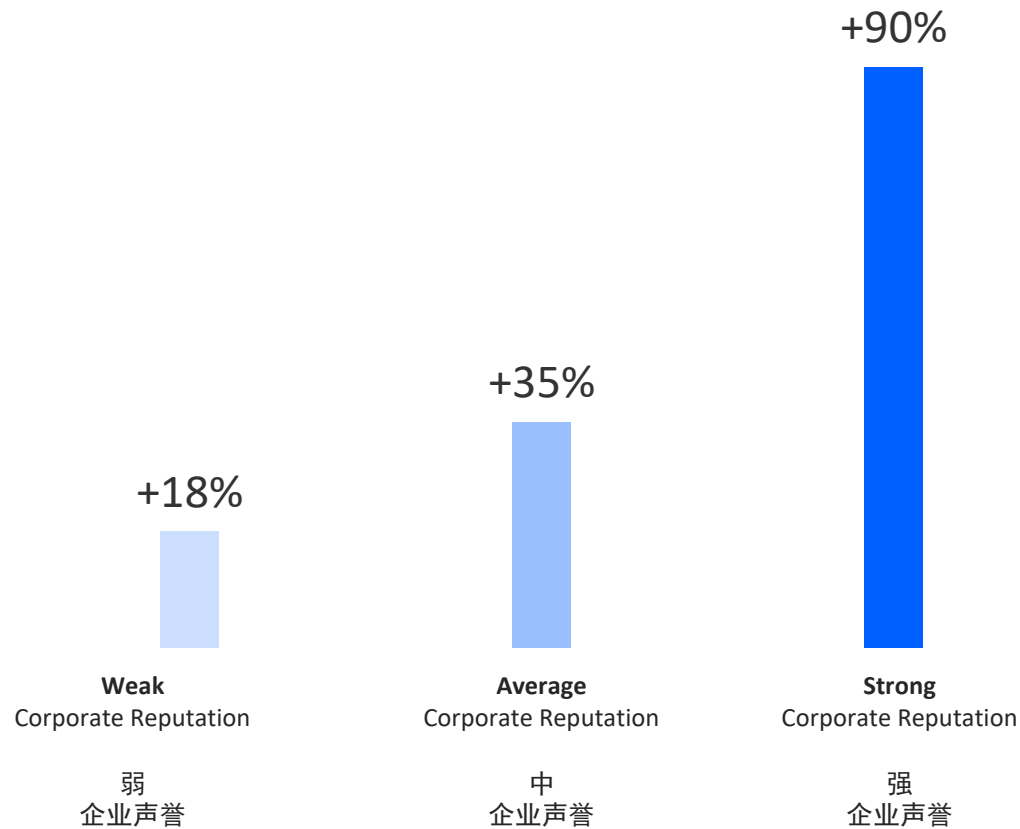
Brands with a strong Corporate Reputation grow brand value at a faster rate

具有良好企业声誉的品牌 增长更为显著

华为
2020年品牌价值：
374亿美元



BRANDZ™
TOP 100
Most Valuable
Chinese Brands
最具价值中国品牌100强
— 2020 —



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BRANDZ™ Top 100 Most Valuable China Brands: 57 common brands
Appearing in the Top 100 in all years from 2014 - 2020

New Trust Model 新信任模型

BRANDZ
TOP100
Most Valuable
Chinese Brands
最具价值中国品牌100强
2020

Integrity 诚信

Is Open & Honest
开放和诚实

124



顺丰2020年品牌价值：115亿美元

Identification 认同

Cares for customers
真正关心客户

109



美团2020年品牌价值：239亿美元

Inclusion 包容

Treats everyone with respect as equals
平等地给每一个人尊重

114



抖音2020年品牌价值：169亿美元

Lesson 5

Keep Going... Global

乘风破浪...出海远航

2020 BrandZ™ Chinese Globalizing Power Brands

BrandZ™中国全球化品牌50强



数据来源: Google 及凯度 BrandZ™ 中国全球化品牌, 2020

Build Super Salience! 制造超级渴望！

Find your product **meaningful** difference
聚焦产品独树一帜

Emulate top brands and local giants
效法翘楚

Partner up, employer brand building
本土合作结盟，本土雇主品牌打造



10 Years
十年

BRANDZ
TOP100
Most Valuable
Chinese Brands
最具价值中国品牌100强
2020

CARE DARE

关爱

勇敢

WPP

KANTAR

KANTAR



王幸 (Doreen WANG)
凯度中国CEO, BrandZ™全球总领

邮箱: Doreen.Wang@kantar.com
微信: Doreenwangxing



欢迎联系凯度官方公众号

邮箱: cncitor@kantar.com
微信公众号: 凯度



Q & A

UPCOMING EVENTS



Jan 2021



Marketing Trends

Jan 2021



Marketing Café

- Date: Friday, Jan 29 @ 8am
- AmCham Shanghai Office

- Join us for our 9th edition of Marketing Café.

- Get inspired, share your stories and meet some new people.

A football with a glossy finish, featuring a design of the United States flag. The top-left portion is black with white stars, and the rest of the ball has red and white horizontal stripes. The text "SUPER BOWL PARTY" is written across the center in a bold, 3D, yellow-outlined font.

**SUPER BOWL
PARTY**

March 2021

Register For AmCham SH Membership

NOT A MEMBER?

Learn more about AmCham Shanghai!

3,000+

MEMBERS

1,300+

COMPANIES

450+

EVENTS/YEAR

21

COMMITTEES



karen.yuen@amcham-shanghai.org

KAREN YUEN

Senior Director

Corporate and Commercial Development

Thank You

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*** If you are in Group 1, you DO NOT need to be in Group 2.
They are the same.**



Paul 

WeChat ID: **PaulLin123**



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