



THE MOST INFLUENTIAL BRANDS IN CANADA

Results from Ipsos' 2013 Study

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WHAT IS A BRAND?

It's a name. A symbol. A concept. An experience. A way of life. And much, much more.

So much of modern life is branded. From the car you drive to the phone you use, from the coffee you drink to the piece of plastic you use to pay for it all. In the ubiquitous world of brands, some stand out from the clutter to create something more than an experience and to elicit something more than an emotional reaction. These brands have influence. And in some cases, that influence has truly changed our world.

Looking back at 2013, we once again defined and measured the various drivers of influence. But with three years of research to draw upon, we're able to see some trends and changes in the influence many brands exert over Canadians. That includes a look at gender and generational information, stock performance, advertising budgets, and brands that are blazing up the influence charts.

So while we offer a snapshot on the big brands that influence Canadians and why, we also take look at brand influence from a few different perspectives.

And in the end, there are lessons to learn for all brands – no matter how big or small.



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DEFINING INFLUENCE

But what is influence? And how do we define and measure it?

Being influential means having an effect on people's lives. The most influential brands are part of their daily lives, their routine and ultimately, they help make life better, more interesting, and more meaningful. Achieving that is no easy task.

Influence requires relevance and having an impact on the way people live. It elicits strong emotional responses, inspires action, and creates something that people identify with. The most influential brands are important in our world because they know what is important to people and they make that connection.

DRIVING INFLUENCE

In our three years of studying influence, we've learned quite a few things.

The most obvious lesson is that influence is a difficult thing to achieve. People are busy and they turn to many, many brands in their lives – sometimes unaware of what those brands are. But then there are those that stand out. What is the difference and what drives that success?

There are a number of factors that drive influence. From our study, we identified five that have the most impact on influence – each with their own attributes.



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DIMENSIONS OF INFLUENCE

Corporate Citizenship

People expect influential brands to deliver more than just a product or a service. They have to be a part of something bigger. That means playing their part in society, caring for people and the planet, and instilling, expressing and inspiring a high set of standards and values. People want to see themselves in the brands they choose.

Engagement

A brand is a relationship and the more invested people are in that relationship, the more influence it will have in their lives. In today's world, that means connecting and interacting with the brand in more ways than just at the point-of-sale. Influential brands are liked and talked about and people want to know more about them.

Leading Edge

This is 2014, the age where innovation, technology and people are all connected. The most influential brands make the most of that. They're ahead of the curve, they stand out, and they're an example for others to follow. And people love them for that. At least until the next big trend or innovation comes along.

Presence

To be influential, you have to be seen, heard and known. That means getting in people's faces or recruiting an army of advocates to do the job for you. This is where your marketing efforts get to work – promotion, placement, and people. Because you have to be seen to be believed.

Trustworthy

And of course, the cornerstone of any brand: trust. The most influential brands have this in spades. People use them, rely on them, and believe in them. And when they really, truly trust a brand, they'll listen to what you have to say and tell others about it.



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THE TOP TEN COUNTDOWN

We put 100 brands to the ultimate test – a comprehensive comparison and evaluation by the Canadian public. Each survey respondent was asked to randomly assess ten of these brands, answering “yes” or “no” to a series of statements that underpin our five dimensions of brand influence.

The numbers then pointed us in the direction of which brands influenced Canadians the most in 2013. No doubt, you know all of these brands. You've likely had experiences and interactions with some if not all of them in the past week, if not today, or even at this very moment.

Here is our countdown of the Top Ten with their top rated influence drivers and their overall influence index score as rated by our respondents – the Canadian public – with some inside insight on why these brands are so influential.

10. MasterCard

You can't put a price on this kind of influence.

Trustworthy:



Presence:

Influence Index:

“Having a global program like ‘Priceless’, having a strong foundation in consumer insights, having a very passionate team that believes in delivering strong creative, and a consistent dialogue with the consumer audience – enables MasterCard to build influence.”

Milos Vranešević, Head of Marketing at MasterCard Worldwide, Canada

Unless stated otherwise, all quotes are from interviews conducted in January 2014 with Steve Levy.



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9. Walmart

There's no rolling back this brand's value.

Trustworthy:

Presence:

Influence Index:

38

36

187

*"Walmart is the number one retailer in the world so **for that alone we have tremendous presence**. We're growing our footprint with almost 400 stores across the country, and we're building our presence both online and offline"*

Sandra Sanderson, Executive Vice-President of Marketing at Walmart Canada

8. President's Choice

From frozen food to financial services, a 'made in Canada' success story.

Trustworthy:

Corporate Citizenship:

Influence Index:

45

24

190

*"The fundamental core of the President's Choice brand is to be a relentless innovator, of always bringing new things, of always solving problems. We serve 13 million Canadians every week. **Many Canadians touch the brand each and every day.**"*

Uwe Stueckmann, Senior Vice President, Marketing at Loblaw Companies Limited

7. YouTube

A true video rock star!

Leading Edge:

Engagement:

Influence Index:

34

34

195

*"We're entering the third wave of media. The first wave was the broadcast networks. The second wave was cable networks. Now **it's about giving people exactly what they want to watch today.**"*

Salar Kamangar, CEO at YouTube

Speaking at an on-stage interview with AllThingsD's Peter Kafka in January 2012.



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6. Tim Hortons

Keeping it fresh with a Canadian icon.

Trustworthy: Corporate Citizenship:

33

24

34

Presence: Influence Index:

203

*"Everyone involved is proud of the Tim Hortons brand. **We are a good corporate citizen.** It is a natural thing that our team does. Things like the Children's Foundation are important things that we continue to do genuinely and in an honest way."*

Glenn Hollis, Vice President, Brand Strategy, Marketing, Digital & Experience (Canada, USA & International) at Tim Hortons

5. Visa

Wherever you go, this brand is there.

Trustworthy: Presence: Influence Index:

35

33

220

*"Trust is fundamental to the brand. And so is presence. With 32 million cards and hundreds of thousands of merchant locations across Canada, **Visa really is everywhere!**"*

Brenda Woods, Head of Marketing at Visa Canada

4. Apple

A bright shiny icon of modern life.

Leading Edge:

42

Trustworthy:

27

Influence Index:

249

*"Our whole role in life is to give you something you didn't know you wanted. And then once you get it, **you can't imagine your life without it.** And you can count on Apple doing that."*

Tim Cook, CEO at Apple

Speaking with Brian Williams of NBC in December 2012.



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3. Microsoft

An open window on extraordinary influence.

Leading Edge:

38

Trustworthy:

36

Engagement:

19

Influence Index:

285

*"The innovations and the investments that we continue to make in **bringing innovative products to the marketplace** is phenomenal. You don't find other companies that make the kind of investment that we do in R&D – it's who we are at Microsoft."*

Cheri Chevalier, CMO at Microsoft Canada

2. Facebook

A place to connect, share...and influence.

Leading Edge:

45

Engagement:

37

Influence Index:

309

*"At Facebook, our mission is to make the world more open and connected. We are in the business of **making sure that we engage people** with people, people with brands, brands with people. That's what we do and I think we do a really good job of it."*

Jordan Banks, Global Head of Vertical Strategy at Facebook

1. Google

When you believe being great isn't good enough, you end up at the top!

Leading Edge:

36

Trustworthy:

38

Influence Index:

415

*"I draw my inspiration from Google. **We strive to earn the trust of users every day.** Without that, it's really hard to create the products and services that improve someone's life in a material way. That's a material focus, I don't see that changing."*

Chris O'Neill, Managing Director at Google Canada



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THE POWER OF INFLUENCE

This is the third year that Ipsos has assessed the Most Influential Brands in Canada. But beyond our own measures, metrics and surveys, we can see how some other issues are very much related to brand influence. Influential Brands invest and this investment pays dividends. We found that the Most Influential Brands had healthy media spend levels. And furthermore, the Most Influential Brands all had stocks that had a positive trend in share price.

Hey Big Spender!

Presence is an important driver of influence and this is where it pays to advertise. Since we started measuring the Most Influential Brands in 2011, we've noted a correlation between some brands' ad spend and their Influence Rank.

Using media spend data from Nielsen Media, we highlight a few brands that have invested heavily in bought media.

Since 2010, Visa has increased its media spend in Canada and the most recent figures, covering 2012, show they added 20 percent more to their budget. In that same time, their Influence Rank has also increased. In 2011 they placed 8th. A year later, they were 6th. And for 2013, they came in at 5th.

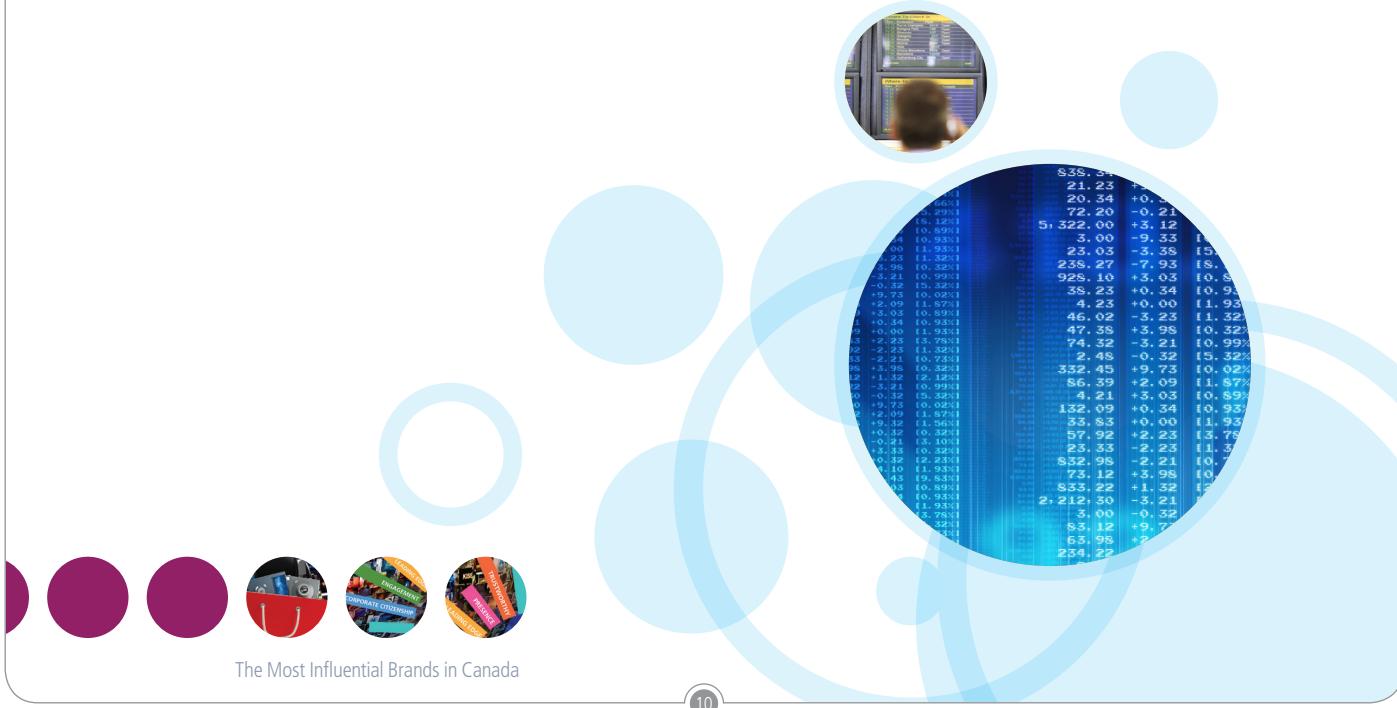
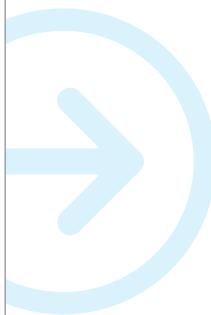
Other big brands that advertise heavily, like Apple and Tim Hortons, are also seeing the benefits of their hefty media spend. Apple has been in the Top Five of our list for the past three studies and Tim Hortons continues to climb the ranks from 15th spot in 2011 to 8th in 2012 to now just being outside the Top Five in 2013, sitting at 6th. Apple has increased media spend by almost a third and while increasing its budget only incrementally in that time, Tim Hortons remains the biggest media spender in our study.



Taking Stock of Influence

In most cases, influence and stock price go hand in hand. Over the past three years, Google's influence has risen and so too has its stock value. While Facebook only went public in 2012, its brand influence and stock performance has been moving up in tandem. This was also true for Microsoft, Apple and Visa – all performed well both as influential brands and on the stock market.

BRAND (in order of 2013 rank)	Stock Price (Dec '11) Influence Rank 2011	Stock Price (Dec '12) Influence Rank 2012	Stock Price (Dec '13) Influence Rank 2013
Google	\$645.90 2	\$707.38 1	\$1,069.96 1
Facebook	NA 7	\$26.62 4	\$51.83 2
Microsoft	\$25.96 1	\$26.71 2	\$37.22 3
Apple	\$405.00 4	\$532.17 3	\$560.54 4
Visa	\$101.53 8	\$151.58 6	\$203.44 5



OF GENDER...

Men and women think and act differently so naturally, they should have different experiences with different brands. Right?

Sort of.

The genders can agree on the influence of today's technology and social media brands, but they do demonstrate some differences on the influence of various retail, media and financial service brands.

Both men and women give Google its credit as the most influential brand. And brands like Facebook, Microsoft, Apple, and Visa stay within the top ranks for each gender. But men are more likely to be influenced by brands like the CBC, MasterCard, and Canadian Tire, whereas women are more likely to feel the influence of brands like Tim Hortons, Walmart and The Weather Network.

Here we count down are the ten most influential brands as defined by gender – there are clearly some differences.



MEN

10. YouTube
9. President's Choice
8. Canadian Tire
7. CBC
6. MasterCard
5. Apple
4. Visa
3. Facebook
2. Microsoft
1. Google



WOMEN

10. The Weather Network
9. Walmart
8. President's Choice
7. YouTube
6. Visa
5. Tim Hortons
4. Microsoft
3. Apple
2. Facebook
1. Google



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...AND GENERATION

Comparing brand influence by the generations, we see both gaps and close ties.

Defining the Generations

Generation	Born between
The Millennials	1982-1992
Generation X	1965-1981
The Boomers	1946-1964

It should be no surprise that the **Millennials** are heavily influenced by technology and social media brands. After all, this is the generation that grew up with the Internet and cell phones. They are heavily influenced by brands like Google, Facebook, YouTube, Apple, Microsoft and Pinterest. Social media, online retailers and services, and coffee and fast food brands also influence this young, connected and busy generation.

Top Ten Influential Brands for MILLENNIALS

10. Tim Hortons
9. Pinterest
8. Visa
7. Walmart
6. Microsoft
5. President's Choice
4. Apple
3. YouTube
2. Facebook
1. Google



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In contrast, the Most Influential brands for the **Boomers** reflect a mix of modern and traditional. Like their younger cohorts, they are heavily influenced by Google, Facebook, Microsoft and Apple. But they also feel the impact of traditional brands such as the good old CBC, established retailers like Canadian Tire and loyalty programs like Air Miles. While social media is not irrelevant to them, it isn't as influential as it is on younger generations.

Top Ten Influential Brands for the BOOMERS

10. Air Miles
9. MasterCard
8. President's Choice
7. Canadian Tire
6. Visa
5. Apple
4. CBC
3. Facebook
2. Microsoft
1. Google



Being sandwiched between these two generations and in the midst of the family rearing stage of life, **Gen X** has long thrown off its grunge filled angst to be influenced by a mix of tech and family-friendly brands. Google, Facebook, Microsoft and Apple top their list, but brands like Tim Hortons, Walmart, The Weather Network and President's Choice also help them navigate through daily life.

Top Ten Influential Brands for GEN Xers

10. YouTube
9. President's Choice
8. The Weather Network
7. Visa
6. Walmart
5. Tim Hortons
4. Apple
3. Microsoft
2. Facebook
1. Google



THESE BRANDS ARE ON FIRE!

Brands are dynamic. So too is their influence. New brands will come in and completely change the landscape. And some long-established brands will reinvent themselves or get rediscovered by a new generation of consumers. While some brands will struggle, stumble or disappear offering many lessons in brand management, the up-and-comers and the movers-and-shakers are more exciting to talk about.

Comparing results from previous years, three brands in particular made significant jumps in 2013, elevating their influence across the Canadian market. One is as old as Canada itself. Another is a true brand for the era. And the third just keeps whetting our appetites. But for various reasons, these brands made an upward trajectory in their influence over Canadians in 2013.

12 Steps Ahead

FROM 35
IN 2012

TO 23
IN 2013

MCDONALD'S They're lovin' this!

A decade before the Cola Wars really heated up, the Burger Wars were well under way, with McDonald's leading the charge. Tastes and diet concerns have changed frequently since the 1970s, yet McDonald's has continuously found ways to blend in classic fare with new flavours – and stay ahead. With a massive ad budget and locations in hundreds of communities across the country, their enormous presence alone contributes to their growth in influence.

*"We've been going through a brand transformation here in Canada. It really starts with our guests and being focused on what their wants and needs are. For the past four or five years, **we have been very focused on what the customers are looking for** from McDonald's."*
Joel Yashinsky, Senior Vice President & Chief Marketing Officer at McDonald's Canada



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Moving Up 32

FROM 84
IN 2012

TO 52
IN 2013

HUDSON'S BAY COMPANY

Influence in store, since 1670.

What brand is more connected to the long history of Canada than HBC? The simple answer is none. This coming May, the company will celebrate 344 years since it was founded. Remarkable! And yet, in 2013, they showed an increase in their influence that proves the brand is still vital, relevant and engaging.

*"There was latent goodwill because this is an historic company. A lot of people in Canada had a rooting interest in Hudson's Bay Company – if we could improve ourselves, they wanted us to succeed and that's what **we've reignited with our customers.**"*

Patrick Dickinson, Senior Vice President, Core Marketing and Brand Strategy at Hudson's Bay Company

36 Leaps to 36

FROM 72
IN 2012

TO 36
IN 2013

NETFLIX

Now this is the 'new black'!

Remember when entertainment meant either going to the theatre or being tied to the schedule of TV executives? Well, thanks to Netflix, you can watch almost anything you want, when you want and where you want. Ah, the marvels of technology! A few years ago, they didn't even register on our list. Today, Netflix is on the leading edge of something truly exciting, even venturing into the realm of delivering original content. Their influence is growing.

*"We're very focused on making the streaming service better and better. Over time, all video around the world is going to become Internet video where each person can choose what they want to watch. **Netflix is one of the entertainment services that everyone wants.**"*

Reed Hastings, CEO at Netflix

Taken from an interview with the Wall Street Journal in September 2012.



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LASTING INFLUENCE

Since we started our annual quest for the Most Influential Brands in Canada a few years ago, there has been much learned about the brands that have the most influence on our lives. In the world of 2014, we see a completely different place than we did even ten years ago – one where the pace and quality of change is faster and sometimes shockingly so. It is almost no surprise that our 2013 assessment of influential brands proves the importance we put on technology, social media and connectivity. Many of the most influential brands allow us to explore, learn, share and just be ourselves.

These brands have worked hard to be trustworthy, engaging, and leading edge and they do their part in the world while carving out a strong presence.

That takes vision, dedication, leadership and know-how. Just look at the brands we presented here – world leaders that have made a difference and will continue to do so. Achieving true influence does not come overnight, but it can be lost quickly.

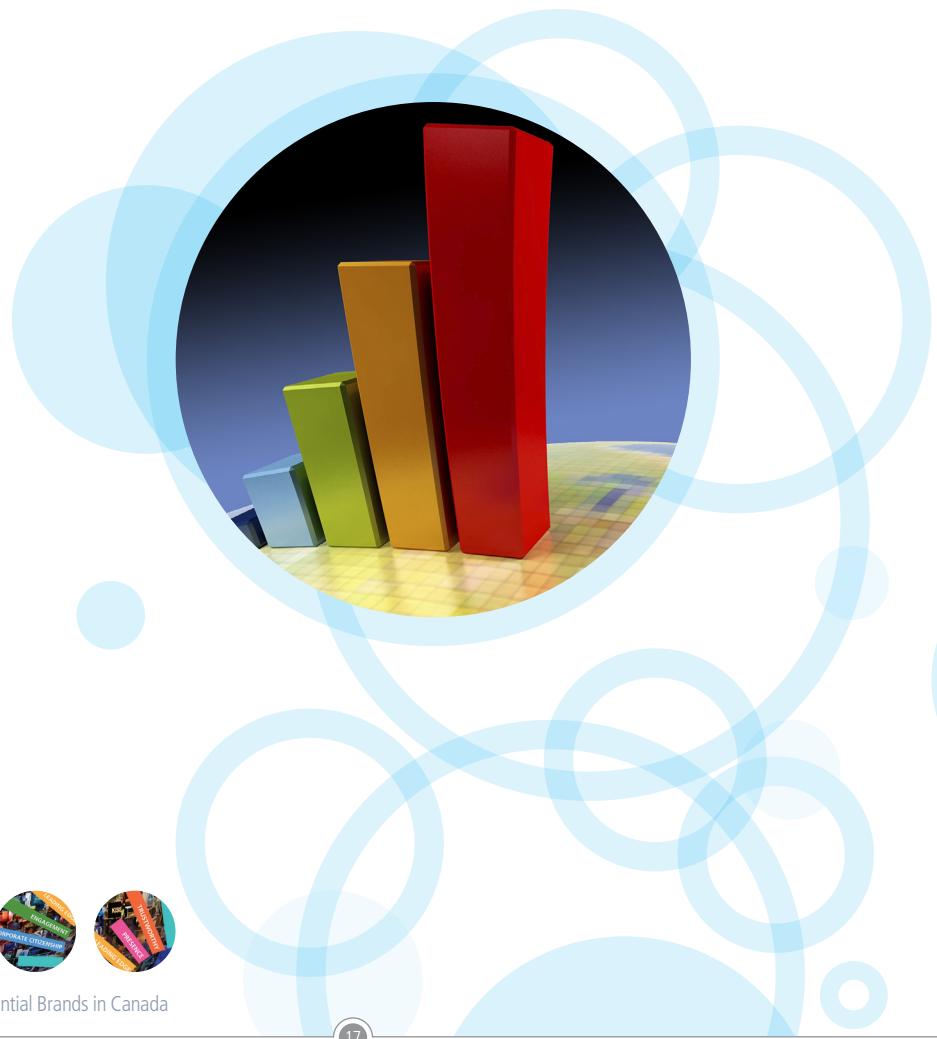
But the brands that connect with and respect consumers as people – no matter how big or small the brand – are the ones that have the most impact and the most lasting influence. Knowing your consumers is the key, because you can't influence them if you don't know who they are. And as you see from this study, influence matters.



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METHODOLOGY

The Top 10 Most Influential Brands study was conducted in December 2013. The online survey of 5,008 adult residents of Canada was conducted using the Ipsos iSay Panel. The results are based on a sample where weighting was employed to balance demographics and ensure that the sample's composition reflects that of the actual Canadian population according to Census data. The precision of Ipsos online polls is measured using a credibility interval. In this case, the results are considered accurate to within +/- 1.6 percentage points, 19 times out of 20, of what the results would have been had the entire population of adults in Canada been polled.



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ABOUT THE AUTHOR



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Steve Levy is a frequent public speaker at both conferences and client events, and talks on a number of topical issues including: the Future of Marketing, the changing digital landscape, marketing in a recession, and the move from the big screen to the small screen.

As COO of Ipsos Reid East, Steve Levy directs the company's Marketing, Loyalty, and MediaCT research business which involves a number of specific responsibilities including managing a staff of almost 100 marketers and researchers, local product development, innovation, and R&D. He also oversees the publication and release of white papers and publications in the marketing and loyalty space, as well as a number of significant research programs.

ABOUT IPSOS

Ipsos is an independent market research company controlled and managed by research professionals. Founded in France in 1975, Ipsos has grown into a worldwide research group with a strong presence in all key markets. In October 2011 Ipsos completed the acquisition of Synovate. The combination forms the world's third largest market research company.

With offices in 85 countries, Ipsos delivers insightful expertise across six research specializations: advertising, customer loyalty, marketing, media, public affairs research, and survey management.

Ipsos researchers assess market potential and interpret market trends. They develop and build brands. They help clients build long-term relationships with their customers. They test advertising and study audience responses to various media and they measure public opinion around the globe.

Ipsos has been listed on the Paris Stock Exchange since 1999 and generated global revenues of €1,789 billion (2.300 billion USD) in 2012.

To learn more, visit www.ipsos.ca.



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