



The
MOST
INFLUENTIAL
BRANDS in Canada

2019



Results from Ipsos' 2019 Study
Steve Levy, Chief Operating Officer, Ipsos Canada



Most Influential Brands in Canada 2019

What do Sandra Oh, Tiger Woods, Greta Thunberg, Pope Francis and Mark Zuckerberg have in common? What is the bond between a Canadian actress, a champion golfer, a teen activist, a religious leader and a CEO? They could be called revolutionary, remarkable, and at times, controversial. But one thing they can be called, without question, is **INFLUENTIAL**.

Influence allows you to earn someone's trust, engage with them and help shape their opinions.

If influence is a sought-after quality by individuals, it can be deemed a necessary entity for brands in today's competitive and crowded marketplace. Businesses have long recognized the importance of influence towards consumers and their eventual profitability; however, recognizing influence and building influence are two very different things.

As it has done for the last nine years, Ipsos studied which brands are influencing Canadians and then peeked behind the curtain to find out just where their influence is coming from. In doing so, Ipsos uncovered five key characteristics influential brands had in common: **Trustworthiness, Engagement, Leading Edge, Corporate Citizenship and Presence**.

Brands that scored highly in several of the five categories found themselves listed on the **Most Influential Brands in Canada for 2019**. And the over one hundred brands named represent a wide variety of industries, from social media platforms, financial services, retail box stores, tech giants to fast food. This wide net proves influence is open to all brands, and all brands are open to more influence.



Great Local Brands Around the World

A brand achieving success is worth exploring, regardless of its location. Fortunately, Ipsos' research is not confined to Canadian borders and includes numerous countries around the world. This global reach provides the unparalleled opportunity to learn from brands that are performing exceptionally well within their own local markets. In the study of influence, let's learn what makes these brands 'Best in Class.'

China—Didi

Didi has been on the rise in China since it was founded in 2012 and became a Top 10 Most Influential Brand in China for the first time in 2019. Didi is to China what Uber is to Canada—its country's leading ride-sharing brand. As with many companies in China, the statistics for Didi are staggering. Didi is present in more than 400 markets across the country and possesses a user base of over 550 million customers. The latter figure is even more astonishing when you consider it is roughly double the number of global ride-sharing users for all other companies around the world. Didi firmly established itself as the dominant ride-sharing brand in China when it bought out Uber's Chinese business in 2016. It then aggressively expanded its operations to other markets around the world, including Mexico and Brazil in 2019. The ride-sharing giant has also looked to diversify its portfolio by offering food delivery, bike-sharing, bus and chauffeur services. Not resting on its current success, Didi is planning ahead by teaming with auto manufacturers such as Toyota to develop automobiles which are optimal for ride-sharing services, such as electric vehicles and self-driving cars.

Brazil—NuBank

NuBank lives up to its name, having debuted in 2013. From the launch of its first credit card in 2014, it has grown rapidly and, as of 2019, counted 20 million customers in Brazil. NuBank has also grown its services to now include credit cards, savings accounts, and personal loans. It also recently expanded operations into Mexico and will be launching services in Argentina in the coming year. NuBank stands out from other financial service competitors because its business is managed entirely online through its mobile app and website, making its money through service fees and interest; like other Fintech companies, this allows NuBank to save on costs of operating physical banking branches. These savings are then passed on to customers in the form of lower banking fees which makes NuBank an attractive option, especially to the 55 million Brazilians who, prior to NuBank's launch, did not interact with a bank. NuBank therefore creatively and successfully tapped into an untapped market and also realizes there is more potential business to be had with over 1.5 billion people globally not currently conducting any business with a bank.

United Kingdom—British Broadcasting Corporation BBC

The BBC is the world's oldest and largest national broadcasting organization, first formed in October 1922 as a radio broadcast, before the invention of the television. With over 35,000 employees, the organization is funded by an annual television 'license fee' or 'television tax,' paid by all households/companies receiving live television. This allows it to run commercial-free broadcasts. Its BBC News division is the largest news broadcasting organization in the world, with 50 foreign news bureaus around the globe. The BBC continues to stay relevant by creating programming that is inclusive and includes under-represented groups such as Britons with disabilities. It also invests in technologies that improve the scope of their news reporting. Of all media and news brands included in this study around the world, the BBC has the highest rank within its own country, by a wide margin.

Hong Kong—Mass Transit Railway—MTR

When you have over seven million people living in a city, efficient and convenient transportation is essential. Hong Kong's MTR is one of the most profitable metro systems in the world. Established in 1975, it is now comprised of heavy rail, light rail and a feeder bus service which carries 5.9 million passengers on an average weekday. MTR boasts a higher annual ridership than New York City and four times the ridership of Toronto's TTC. It is one of the only mass-transit systems in the world that is fully funded by fare payments, and for many years maintained a 99.9% on-time rate for train journeys. The Octopus Card, its fare payment card, not only gains users access, but it is also an accepted payment method at many popular merchants across Hong Kong. Despite its successes, 2019 did present some unexpected challenges for MTR. The ongoing riots and protests in Hong Kong resulted in damaged trains and train stations. It also created service disruptions for its commuters. Even with these hurdles, MTR was still a Top 10 Most Influential Brand in Hong Kong in 2019. Imagine how well MTR would have performed were it not for those obstacles!



Path to Influence

Our multi-generational world is making history. It is the first time we have had six living generations—four of which are in the workforce. Not only is a Baby Boomer, Generation X, Millennial and Generation Z sharing an office place, they are also sharing the marketplace. This has made marketing a complicated endeavor for many businesses. Can you speak to four generations who possess different characteristics, values and goals, all at once? The path to influence for brands seems to be paved by that very ability. This journey towards Top 10 MIB status is one that takes time as brands look to grow their appeal across multiple generations. We have identified three stages which brands walk along during their path to influence.

Trailblazer

The path to the Top 10 ranks is paved by trailblazers. These brands have shown us new ways in which to attain influence, especially by speaking to one generation and seeing that popularity spread to others. A prime example worth exploring is Netflix. The streaming giant's ascension up the MIB rankings is based on its early appeal with Gen Z and Millennials. These younger generations covet a great selection of content and the ability to view shows on their schedule, not on broadcasting schedules. Netflix successfully targeted this audience when it came to market. But over time, wooed by selections and convenience, new fans emerged in the form of Gen X. Although there is still room to grow with Baby Boomers, Netflix demonstrates the power of the ripple effect.

Netflix MIB ranking

2012 — #72 → 2019 — #7

On the Right Path

In order to move up the competitive MIB list, brands will need to follow the formula set out by our trailblazers—that is to engage with multiple generations. Some brands have found a formula that is working for them. For instance, Spotify has shown an upward trajectory on the MIB list. The digital music service still needs to make inroads with Baby Boomers, but its popularity with Gen Z has spread to Millennials and Gen X, enough to make it the #42 MIB in 2019. That marks an impressive jump of 69 ranking spots in just three years for Spotify. Although Spotify started by speaking to one generation, they have successfully grown their reach to other generations. And as they have exponentially grown their reach, so have they grown in influence.

Spotify MIB ranking

2016 — #111 → 2019 — #42

The Journey is Only Beginning

Like every great journey, you must start somewhere. Such is the case for brands that have secured their relationship with one generation and now seek to grow their connection with others. SnapChat epitomizes this pursuit. Having captured the social media interest of today's youth by ranking #7 for Gen Zers, now it needs to find ways to broaden its appeal with Millennials, Gen X and Boomers. Only after some type of ripple effect will we see SnapChat rise from #49 to Top 10 status.

SnapChat—#49 • Gen Z—#7 • Millennials—#25 • Gen X—#95 • Boomers—#105

Reinvention Can Help

One speed bump along the path to influence is redefining your brand. When you are an established brand, it can be hard to change your image and appeal to generations who never considered you as an option before. An effective way to traverse this speedbump is to reinvent your brand. Such is the case for cosmetics giant, L'Oréal. Despite a long legacy, leadership recognized it needed to appeal to younger generations. Their solution was a three-tier approach: a push towards sustainability with a reduction of water consumption and eco-friendly bottles; offering digital connections such as a virtual nail salon app; offering products with greater variety of skin tones and being ranked as one of the most gender-balanced companies worldwide by Equileap. L'Oréal, in just one year of taking these steps, seems to have made inroads with Gen Z: it moved from a #90 ranking to #48 in this year's MIB. Time will tell if this three-pronged approach will grow the appeal of the 110-year-old company with the other generations and create the ripple effect needed to be a Top 10 MIB brand.

Generational Harmony

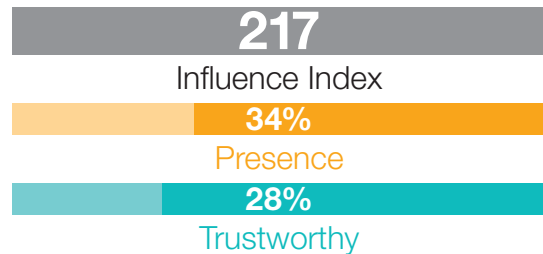
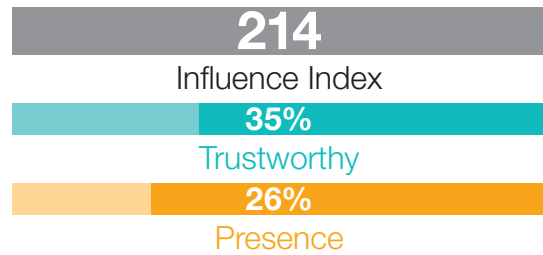
If a brand can connect with tweens and seniors, and everyone in between, that brand has tapped into the formula for influence. You need not look farther than the Top 10 MIB list for proof. Nine out of the 10 brands boasted a maximum 10-point difference between generations when measuring influence. Because these brands are connecting with all consumers, it is easy to cement its top status. The only brand to waver from this and still nab a Top 10 spot was Netflix (#39 with Boomers, but still gaining).

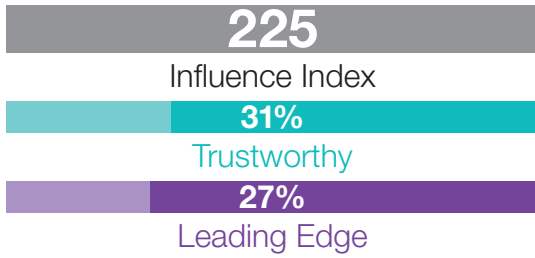
There are other brands that are resonating with almost equal pull across generations in the Top 100 MIB. PayPal, Tim Hortons, LG, Chapters Indigo and RBC all fall under the 10-point margin between Gen Z, Millennials, Gen X and Baby Boomers. Interestingly, one brand registered a remarkable four-point margin, the lowest noted in this year's MIB. Kijiji, the online classified service, holds the #24 spot with a ranking #28 for both Gen Z and Boomers. This broad appeal likely stems from younger generations looking to buy things as they move away from their parents and older generations and empty nesters looking to downsize. Kijiji has the enviable position of having a business which naturally lends itself to being useful for all generations. For brands who are not in such a position, the pressure is on to be inventive, innovative and imaginative. They must create a want and need for their brand with a generation, or generations, that currently does not exist. Because where there is generational harmony, there is influence.

Top 10 Brands of 2019

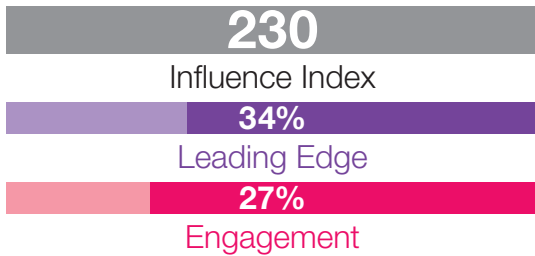
#10 Visa The financial services giant is a regular on the Top 10 MIB list; however, it did drop three spots from last year. Like all industries, financial brands are under pressure to meet the changing needs of Canadians. Since Canadians no longer shop and bank like they used to, Visa has had to expand its services. Canadian users are assured service almost everywhere they travel with over 46 million merchant locations around the world. Visa also recently unveiled a new service from its Visa Direct line with TD Bank, which allows Canadians to easily conduct cross-border money transfers between Canadian and U.S. accounts. With security and data privacy issues a concern, Visa has looked to protect the over 100 billion global transactions it does per year. Almost all of these transactions are processed through VisaNet, its own global network, at one of its four heavily secured data centers. They are protected against natural disasters, crime and terrorism. Each center can operate independently of the others. At number 10, Visa ranks as the most influential financial services brand in Canada.

#9 Walmart has held its ninth place spot from last year. The retailer has expanded to over 400 stores since opening its doors in Canada 25 years ago. Not content to rely on its in-store consumer, Walmart has aggressively targeted the online shopper as it battles Amazon for e-commerce dollars. Currently, approximately 750,000 customers visit Walmart Canada's website each day. To handle its growing business, the retailer recently opened a new 450,000 square-foot distribution center in Mississauga to handle online orders exclusively. Walmart also looked to incentivize shoppers by offering free one-day shipping on more than 220,000 items, with a minimum purchase of \$35. In another attempt to challenge Amazon, Walmart now allows shoppers to order their groceries using Google's smart home assistant. With both its brick and mortar stores and its growing online business, Canadian consumers of all ages are feeling Walmart's presence and influence.





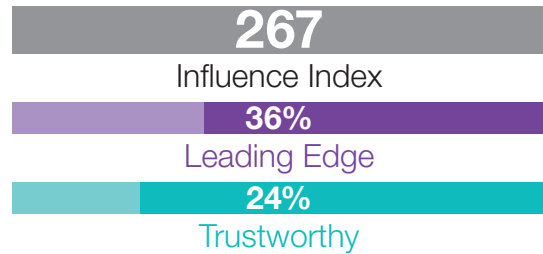
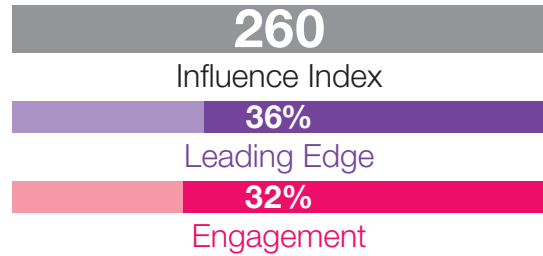
#8 Samsung took a big leap this year moving up five places in this year’s MIB list. The South Korean company is especially popular with Millennials and Gen Xers in Canada, ranking as their seventh most influential brand. Samsung has sought to create appliances that speak to these consumers. Whether it is their Frame TV, which stylishly displays stunning art work when not in use, or its third consecutive win as Appliance Manufacturer of the Year by ENERGY STAR Canada for its commitment to energy-efficient product innovation, or its SmartThings line for Smart Homes, Samsung speaks to the multiple needs of Millennials and Gen Xers. Of course, Samsung’s appeal to consumers goes beyond appliances. In Canada, it holds over 30% of the smartphone market share, only trailing Apple. The duo dominate the smartphone space in Canada. Because of its early entry into the 5G sector, it predicted 4 million sales of 5G-capable smartphones globally by the end of 2019. Also, in 2019, it launched Samsung POS (Point of Sale) exclusively in Canada. It was hailed as a mobile payment solution for small businesses, allowing them to accept debit and credit payments up to \$100 CDN by tapping contactless cards onto Samsung NFC-enabled devices without requiring additional hardware. Samsung’s innovation and extensive range of products has allowed them to enjoy broad appeal with all generations of Canadians.

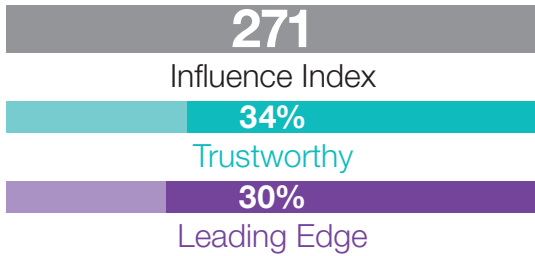


#7 Netflix has made the option of staying in on a cold day a popular one. And with many cold days in Canada, it’s no wonder the online streaming service boasts over 14 million users in our country. Netflix moved up one spot in this year’s MIB list, thanks to its incredible popularity with Millennials (their second most influential brand) and Gen Z (their sixth most influential brand). These two generations have made no secret about how they like to consume. They like options, quality content and the ability to watch when they want and how they want. With those wants, it’s no surprise that Netflix meets their needs. In 2019, Canadians were streaming popular Netflix Original TV Shows: The Crown, Black Mirror and Stranger Things. Netflix has gone beyond tv shows and in 2019 made more movies than any other film studio. Of its 60 releases, “The Irishman” and “Marriage Story” are nominated for a Best Picture Oscar. In a relatively short time, Netflix has become the biggest movie studio in Hollywood basing its success on making movies other Hollywood studios have bypassed, like adult dramas and Rom-Coms. There is no surprise twist in the story of Netflix’s continued influence in Canada.

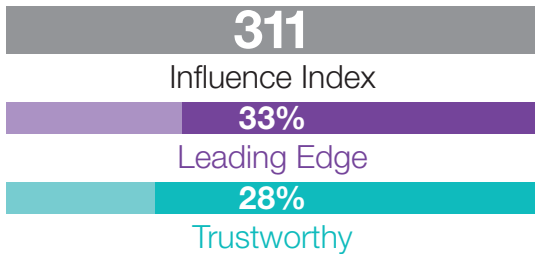
#6 YouTube The popular video-sharing platform holds the sixth spot for the fourth year in a row. YouTube’s influence is seen across all demographics, ranking second for Gen Z and sixth for Gen X and Boomers on the MIB list. Since it debuted in 2005, YouTube has gone beyond videos of pet tricks and family fun. It has expanded to tutorials, blogging and even original series, like the popular sports trick shots channel, “Dude Perfect.” The power of YouTube can be truly seen in the rise to stardom for Canadian singer Justin Bieber. The Stratford teen was discovered in 2007 by a talent manager who noticed his music videos were attracting millions of views on his YouTube channel. Fast forward over a decade and the award-winning pop star has the leading channel from Canada with over 19 billion views of videos uploaded to Justin Bieber VEVO. The meteoric rise of Justin Bieber can be rivalled by that of YouTube itself, with one billion hours of content viewed per day and 2 billion monthly active users around the world. Whether Canadians are logging on to view, share, be entertained or to learn, the key is all ages are coming to YouTube.

#5 Apple It is hard to escape seeing the influence that Apple has on our lives. Their products are everywhere and according to the MIB Generation’s summary, the tech giant is influential to Gen Z, Millennials, Gen X and Boomers, almost equally. Despite its cross-generational appeal, Apple dropped two spots in this year’s MIB list. Apple continues to be the leading smartphone of choice in Canada with a comfortable lead over its nearest competitor, Samsung. In an effort to stay ahead of its global competition, Apple invested over \$16 billion on research and development. In 2019 it released AirPods, a new iPhone 11 featuring an updated camera, and Apple TV. To take on the 5G sector, Apple purchased Intel’s smartphone modem division for \$1 billion. Time will tell if this aggressive move in the smartphone market and the growth of Apple TV will see an increase of influence in Canada this time next year. In the meantime, Apple’s reward for having a diverse portfolio of products and services with something for everyone has resulted in influence.





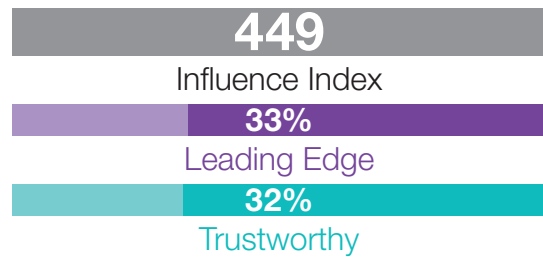
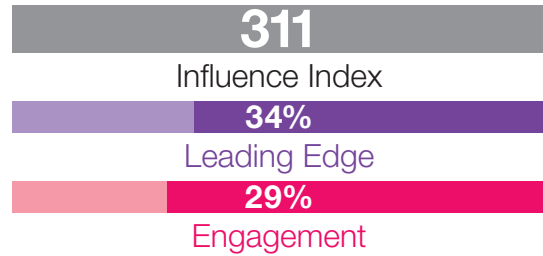
#4 Microsoft After two years in fifth place, Microsoft moved up (yes, up) one place to land at number four on the 2019 MIB list. Coming off its best year in a decade (based on stock price performance), it became the third U.S. public company to be valued at over \$1 trillion, following in the remarkable footsteps of Apple and Amazon. In 2019, we saw businesses across Canada still using the Windows 7 operating system upgrade to the new Windows 10 version—the world’s most popular PC operating system with estimates of its current usage at 900 million devices. The tech-giant continues to focus on its cloud products as it looks to be the top provider of cloud computing services behind Amazon’s AWS. At 14%, Microsoft Azure holds the second largest share of the cloud computing market and is now available in 140 countries. In 2019, the Government of Canada announced it was working with Microsoft to relocate its highly sensitive data to the cloud. This new contract allows government employees to access a wide range of Microsoft Azure services while being assured of a high level of security and privacy. On the product front, look for a few notable products to be released in 2020: a dual-screen tablet, the Surface Neo, and a smaller foldable device that can also be used as a phone, the Surface Duo. Microsoft is skillfully growing its products and services, and in doing so, growing its influence with Canadian consumers.



#2 Amazon For the first time, we see a tie for second place in the 2019 MIB list between Amazon and Facebook. As Canada’s largest online retailer, Amazon maintains its second-place ranking from 2018. Despite its mammoth selection of items for sale and owning Whole Foods, Amazon continues to show us it’s much more than a retailer. It is also in the industries of cloud computing, artificial intelligence and digital distribution. From products we buy and media we stream, to turning our home into a “smart home,” Amazon’s reach is growing. Because of its pervasive reach, Amazon appeals to all demographics, from Gen Z to Boomers. Amazon’s mammoth e-comm revenue remains the source of its reach and it continues to look for ways to improve its services. It recently introduced one-day shipping on more than 10 million products and continued with Amazon Prime Day, which offers product deals to Prime subscribers. At the end of the day, Canadians are ordering, downloading, streaming and buying with Amazon. And, Amazon, for its part, is influencing us.

#2 Facebook The social media giant jumped from fourth place in 2018 to share second spot with Amazon in 2019. With approximately 23.8 million users in Canada (53% of those being women), Facebook wields a lot of influence. Facebook’s business is built on engagement by bringing people together with friends and family and connecting businesses. Some of its services include Messenger, Marketplace, Instagram, WhatsApp and it recently launched Facebook Dating in the U.S. It is most influential with Gen Xers, ranking number two for that demographic. For all of its likes and flash, Facebook has shown an incredible ability to be resilient. Over the last few years, the tech company has withstood a myriad of controversies, from fake accounts, data security breaches, privacy issues, a Federal Trade Commission investigation, fines and falling stock prices. Most companies would be relieved to withstand such controversy, let alone be ranked the second most influential brand in Canada. But one thing we have learned is that Facebook is not “most companies.”

#1 Google tops the Most Influential Brand list this year, making it eight consecutive years of dominance. Dominating is nothing new for Google, seeing as it generated 88% of the desktop search traffic in Canada in 2019. Its array of online services and products merge together seamlessly: Google Home, Google Assistant, Google Maps, Google Earth, Google Docs, Google News, Google Translate and owning YouTube. Google also has the ability to uncover what Canadians are thinking about, by revealing the top trending moments of the year and decade—both of which were the Toronto Raptors’ 2019 NBA championship win. In addition, the tech-giant recently unveiled a cloud gaming service named Stadia. And, it announced the biggest renewable energy deal in corporate history—a \$2 billion wind and solar investment. Google taps into our needs and wants, often before we even know we are missing something. Then they introduce that service/product and we wonder how we ever lived without it. This ingenuity is behind the phenomenon in which we see why Gen Z, Millennials, Gen X and Baby Boomers all rank it as their most influential brand. So, what does influence look like? Google it to find out.



The Takeaway

Brands are under more pressure to be many things to many people. They are expected to provide a multitude of products and services to consumers who span teenage years to senior citizenship. This seems to be an unattainable goal; however, not impossible. Some brands are accomplishing this feat and find themselves on the 2019 Most Influential Brands list. Although they range from food, retail, media, financial and tech industries, they do have commonalities. It is in these commonalities Ipsos identified five keys to brand influence: Trustworthiness, Engagement, Leading Edge, Corporate Citizenship and Presence. These keys, alone, are not enough. In order to be on the path to influence, brands must engage with all generations, simultaneously. Brands can no longer afford to focus on one demographic whilst ignoring the rest. Simply put, brands who matter to Gen Z, Millennials, Gen X AND Baby Boomers are influential to Canadians.



ABOUT THE AUTHOR



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Steve Levy is a frequent public speaker at conferences and client events, and talks on an array of topical issues, including the fact that there is NO big picture, the changing digital landscape, and the transition from the big screen to the small screen.

In his role at Ipsos, he leads the teams that work most closely with our clients and the thousands of research assignments that the organization engages in for clients across the key segments of the Canadian economy. He is also involved in the publishing/promotion of several white papers, studies, reports and events. Steve continues to be passionate about the work that he does.

ABOUT IPSOS

At Ipsos we are passionately curious about people, markets, brands and society. We deliver information and analysis that makes our complex world easier and faster to navigate and inspires our clients to make smarter decisions.

We believe that our work is important. Security, Simplicity, Speed and Substance applies to everything we do.

Through specialization, we offer our clients a unique depth of knowledge and expertise. Learning from different experiences gives us perspective and inspires us to boldly call things into question, to be creative.

By nurturing a culture of collaboration and curiosity, we attract the highest caliber of people who have the ability and desire to influence and shape the future.

To learn more, visit www.ipsos.ca.



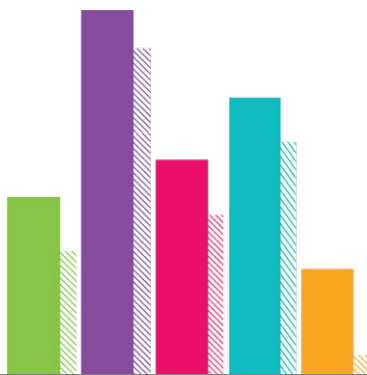
The MOST INFLUENTIAL BRANDS in Canada 2019



Canada's most influential brands march to their own drums: their edgy, unconventional nature is what makes them stand out in a crowded, competitive marketplace. They influence how we dress, communicate, travel, shop, spend our free time, celebrate and socialize. Moreover, the Most Influential brands don't just sell a product or service. They promote a strong sense of purpose and shape our world while connecting emotionally with people. Only those that strike the right balance between trustworthiness, engagement, being leading edge, corporate citizenship and presence will truly make an impact with consumers and indeed on the world.



Steve Levy
Chief Operating Officer, Ipsos



9th

2019 marks the **ninth consecutive year** of the study and results will be unveiled on the morning of February 4th at the Ipsos Most Influential Brands event.

100+

Each year Ipsos studies **over 100 brands** that spend the most on advertising in Canada on an annual basis and ranks their influence.

17

In 2018 the study was conducted simultaneously in **17 countries:**

Argentina	Canada	Denmark	Italy	Saudi Arabia	UK
Belgium	China	Germany	Mexico	South Africa	US
Brazil	Colombia	India	Peru	Taiwan	

2018 TOP 10 MOST INFLUENTIAL BRANDS IN CANADA [Overall]

- 1
- 2
- 3
- 4
- 5
- 6
- 7
- 8
- 9
- 10

2018 TOP 3 MOST INFLUENTIAL BRANDS BY GENERATION

 GEN Z 	 MILLENNIALS 	 GEN X 	 BOOMERS
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DID YOU KNOW

This is a global study being conducted in 12+ countries around the world in 2019.

Findings will be released on February 4th at an event sponsored by The Globe and Mail, Publicis and the ACA.

Subscriptions to the study are available to understand your brand vis-à-vis the competitive category set.

Customized Reports review the drivers of influence for your brand, as well as performance on all measures included in the study. Additional analytics are available at an incremental cost.

Subscriptions include a management presentation customized to include your brand and your competitors.

Customized reports will be available starting in February 2020.

Subscription Price: \$12K for early bird pricing until January 15, 2020.
After Early Bird Pricing, Subscription Pricing cost is \$13,500 for 8 brands, +\$1,000 for each brand beyond 8.

SUBSCRIPTION FORM

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Billing is 100% upon approval. HST is applicable to all study costs.

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