



NETBASE™

NetBase Brand Passion Report 2018: Top Loved German Brands



**2018
REPORT**

Looking for [Brand] Love

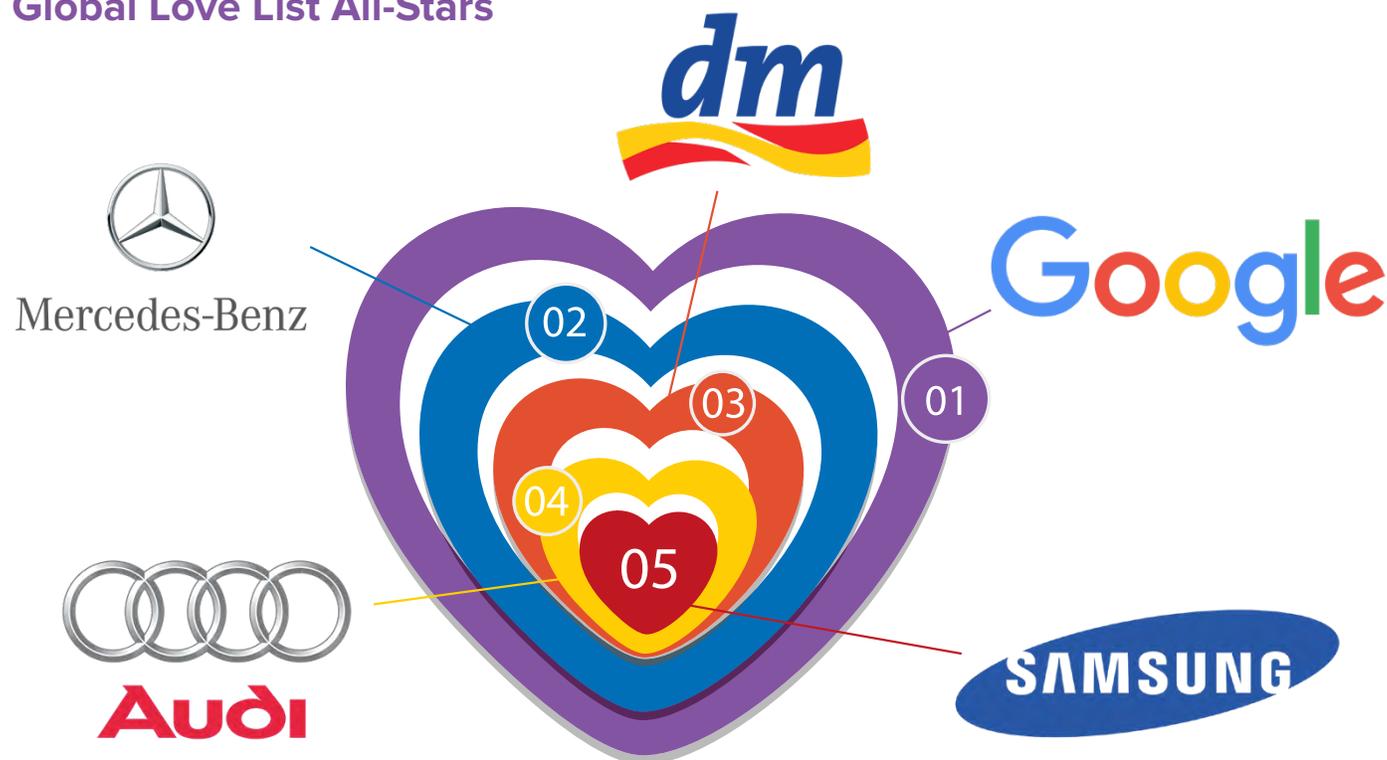
The *NetBase Brand Passion Report: Top Loved German Brands* is a close look at the brands consumers express the most love for in social media across six top industries. Using patented technology, we surfaced the strongest, most positive consumer emotions towards brands, then identified which of the brands get the most love.

Understanding consumer preference is one-part art, and one-part science. It's about more than measuring the volume of social content or sentiment. It's also about the intensity of passion and feeling. And that's information that can drive intelligent brand decision-making.

Now, social passion offers new insights into brand health, allows measurement of campaigns against lasting emotional assets, and informs geographical action—such as where a love potion may be in order before getting to business as usual. And return on investments has been tied to return on love.

In this report, we looked at the overall top loved brands in the six key industries in Germany as discussed on social media channels (German-language posts) from January, 2017 through December, 2017.

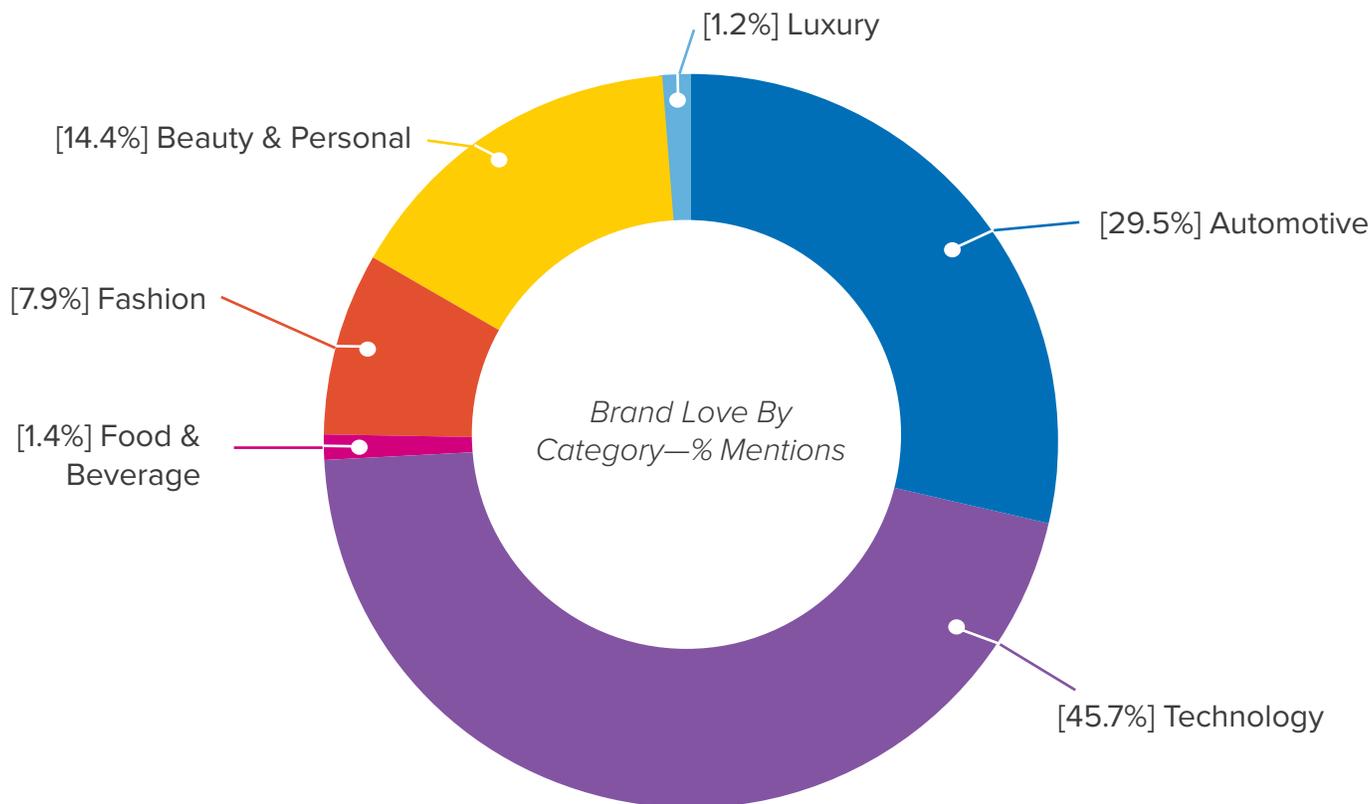
Global Love List All-Stars



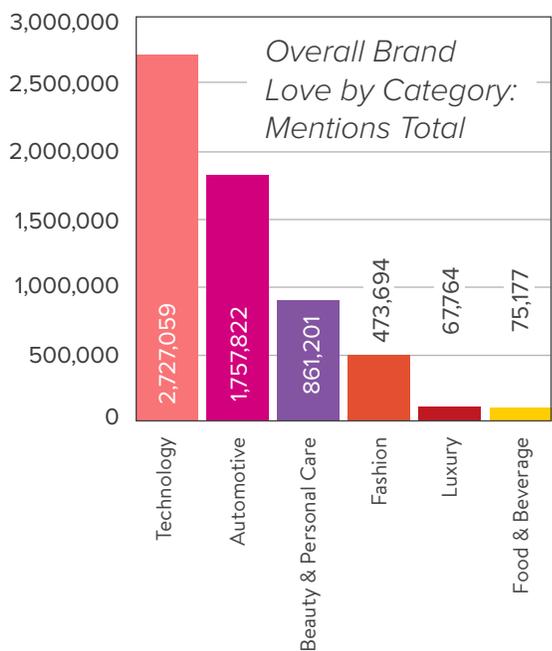
Top Loved German Brands

Brand	Rank	Industry	Mentions (Total)	Sentiment	Reach	Awareness
Google	1	Technology	1,876,545	61	36,391,510,154	33,635,794
Mercedes Benz	2	Automotive	473,266	62	29,968,891,730	23,806,127
DM DrogerieMarkt	3	Beauty	460,959	91	109,746,312	1,036,988
Audi	4	Automotive	453,911	64	8,647,353,500	8,512,236
Samsung	5	Technology	379,159	61	18,178,769,481	9,507,812
Volkswagen	6	Automotive	301,306	28	20,440,710,307	3,667,105
BMW	7	Automotive	286,631	61	11,173,941,992	4,247,890
Sony	8	Technology	210,512	63	9,579,822,143	11,421,495
Zara	9	Fashion	170,447	80	548,391,375	18,924,588
Telekom	10	Technology	163,930	61	9,712,818,037	1,324,722
Porsche	11	Automotive	140,361	67	7,307,796,348	3,065,173
Adidas	12	Fashion	138,129	76	3,268,727,643	8,202,110
Nike	13	Fashion	134,953	77	2,277,880,665	7,535,491
Essence	14	Beauty	131,254	84	149,724,150	7,672,779
Ford	15	Automotive	102,347	70	5,062,019,842	1,753,969
Rossmann	16	Beauty	97,338	84	1,157,685,007	6,082,427
MAC	17	Beauty	66,042	96	10,926,667	3,757,517
Maybelline	18	Beauty	54,518	89	97,459,095	6,980,923
Catrice	19	Beauty	51,090	85	24,444,931	6,649,219
Apple	20	Technology	49,734	52	2,920,941,541	6,337,566
Philips	21	Technology	47,179	72	1,984,204,246	735,843
Gucci	22	Luxury	44,359	68	888,646,006	4,242,945
Krombacher	23	Food & Beverage	29,873	90	165,175,892	237,057
Milka	24	Food & Beverage	18,637	86	466,750,607	1,483,811
Leica	25	Luxury	15,726	83	695,177,812	307,746
Birkenstock	26	Fashion	13,643	75	236,233,533	405,937
Arla	27	Food & Beverage	13,234	92	69,155,404	339,321
Hollister	28	Fashion	8,745	84	32,755,973	1,254,537
Gerolsteiner	29	Food & Beverage	8,598	92	118,320,475	51,702
H&M	30	Fashion	7,777	100	31,609,020	1,245,025
Duplo	31	Food & Beverage	4,079	67	38,412,627	127,798
Glashütte	32	Luxury	3,949	88	150,647,170	12801
Burmester	33	Luxury	2,200	59	58,543,879	22,189
WEMPE	34	Luxury	1,189	87	39,363,563	24,220
Funny-Frisch	35	Food & Beverage	756	53	13,535,587	22,148
Hülsta	36	Luxury	341	75	7,634,483	6,011

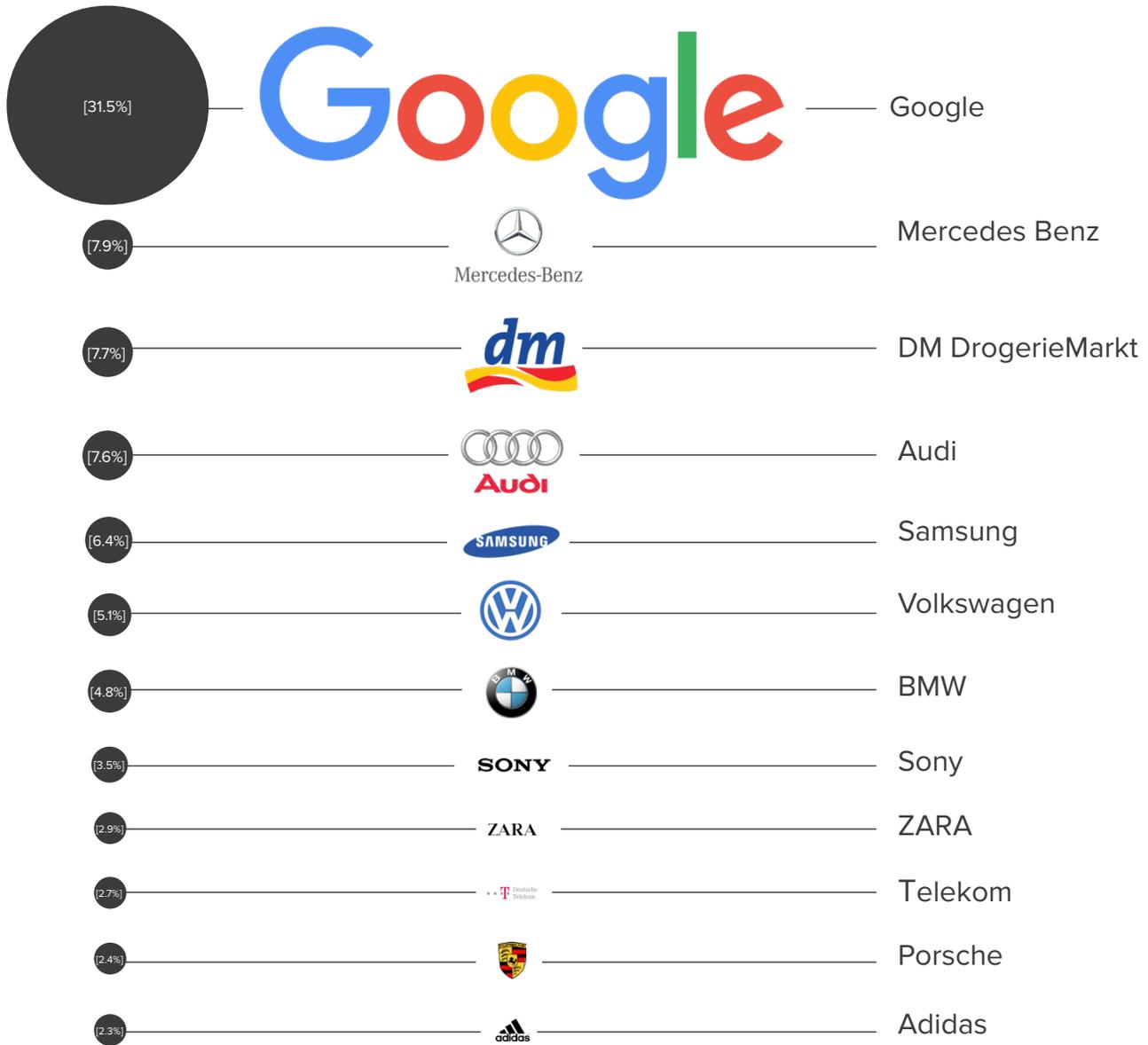
Industry Analysis



Technology brands captured the lion’s share—nearly half—of comparative brand love among the six industries ranked, followed by Automotive. The burgeoning German Beauty & Personal Care industry placed third, followed by the Fashion, Food & Beverage and Luxury sectors.



Top 12 Most Loved Brands (% Mentions)

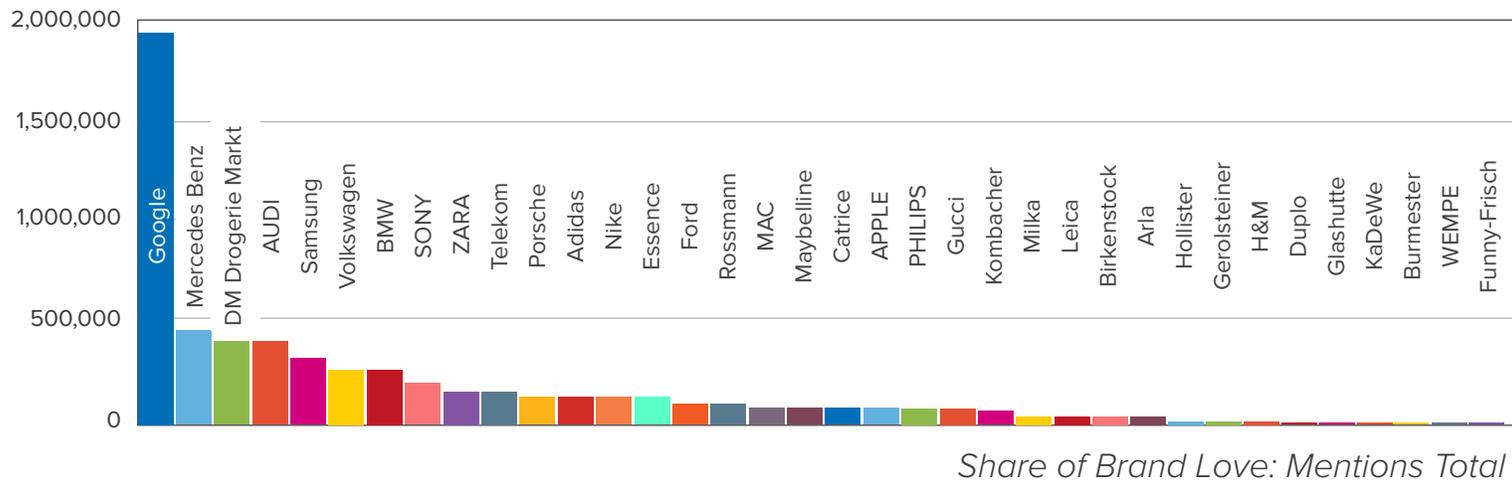


The top 3 loved brands—Google, Mercedes Benz and DM DrogerieMarkt—generated nearly half (47%) of total share of mentions for the 36 brands.

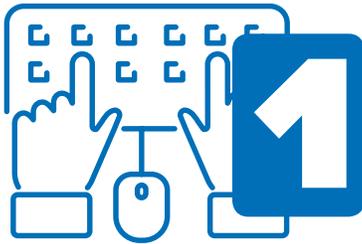
Of the top 5 brands, the category distribution is 2 technology brands (Google/Samsung), 2 automotive (Mercedes/Audi), and one Beauty (DM DrogerieMarkt).

Of the top 12 brands, 4 are technology (Google, Samsung, Sony, Telekom), 5 automotive (Mercedes, Audi, VW, BMW, Porsche), 1 beauty (DM DrogerieMarkt), and 2 fashion (Zara, Adidas).



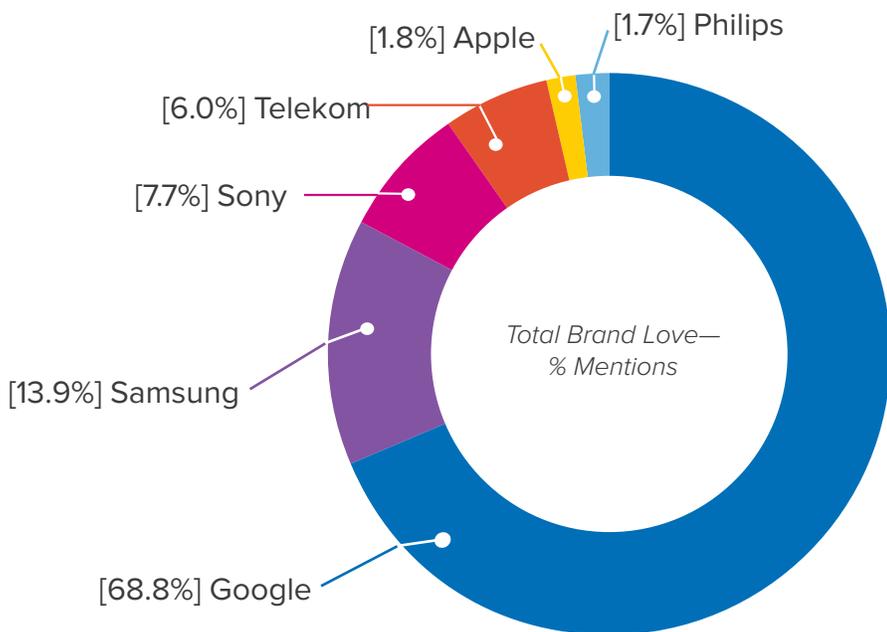


Technology Tops Comparative Industry Ranking



Google is the 800-pound gorilla in the Technology category—based on Mentions as well as Total Engagements per Post—a prescient sign of how Google-related web and app technology increasingly permeates everyday life.

Brand	Social Rank	Mentions (Total)	Sentiment	Reach	Awareness
Google	1	1,876,545	61	36,391,510,154	33,635,794
Samsung	5	379,159	61	18,178,769,481	9,507,812
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Apple	20	49,734	52	2,920,941,541	6,337,566
Philips	21	47,179	72	1,984,204,246	735,843



“The navigation via Google Maps was better than installed Nav system”

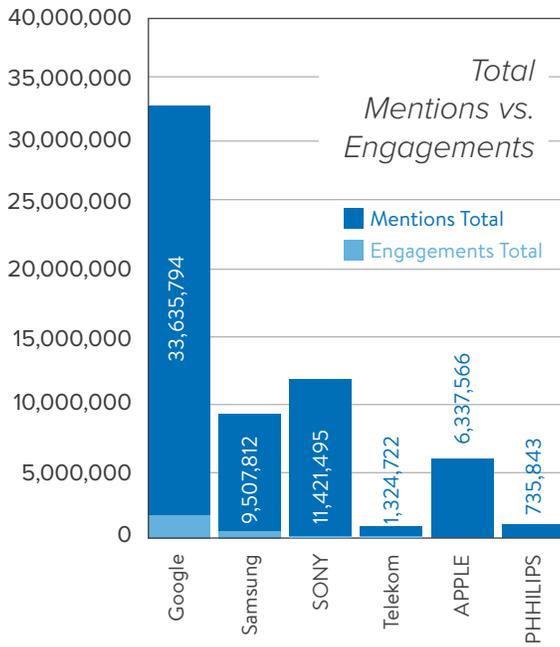


Notably, among all the companies in this analysis, Google is the only mostly web-based company, generating the majority of its revenue NOT from hardware. Remarkably, Google attracted over 30% of the brand passion index overall among six industries and 36 topics. In its category, of the 6 leading tech companies analyzed, Google charmed nearly 70% of the social denizens.

Google Maps: “Google helped us many times and saved a lot of time. Also the navigation via Google Maps was better than installed Nav system. It’s best to download the rough maps at home already.”



Google Sentiment Drivers—Attributes



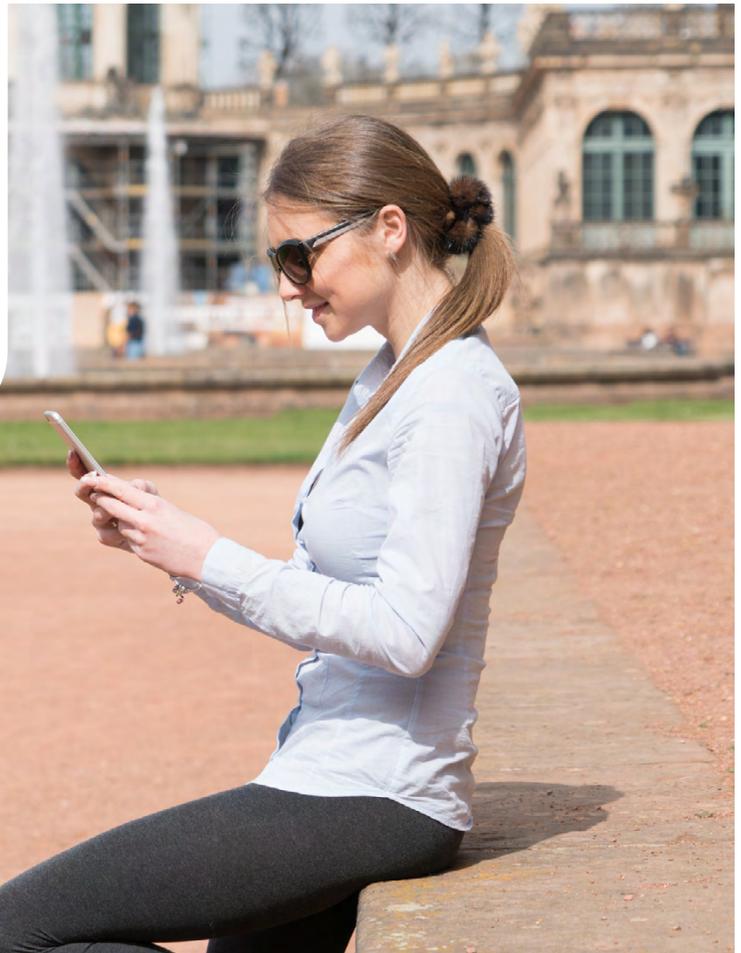
The runners-up prove that ‘share-of-voice’ does not necessarily align with ‘enthusiasm’—as evidenced by Apple who does not rank in the Top 3 for Mentions, but has the second-highest engagement per post in this overview—nearly twice as high as Samsung or SONY.

Similarly, while ‘Negative’ mentions are in the 1-3% range across all brands, the percentage of ‘Positive’ remarks varies more widely—from 2% (for Google) all the way to 14% for Philips, with Apple somewhere in the middle at 8%. Deutsche Telekom—the only German company analyzed in this category and the largest telecommunications provider in Europe—is on par with everyone else when it comes to Total Engagements per Post, including Philips, a Dutch company with a much more diversified portfolio, focused on hardware.

Philips, attracting the slimmest margin of brand love, is nonetheless lauded for its *bahnbrechende Produkt* (ground-breaking product).



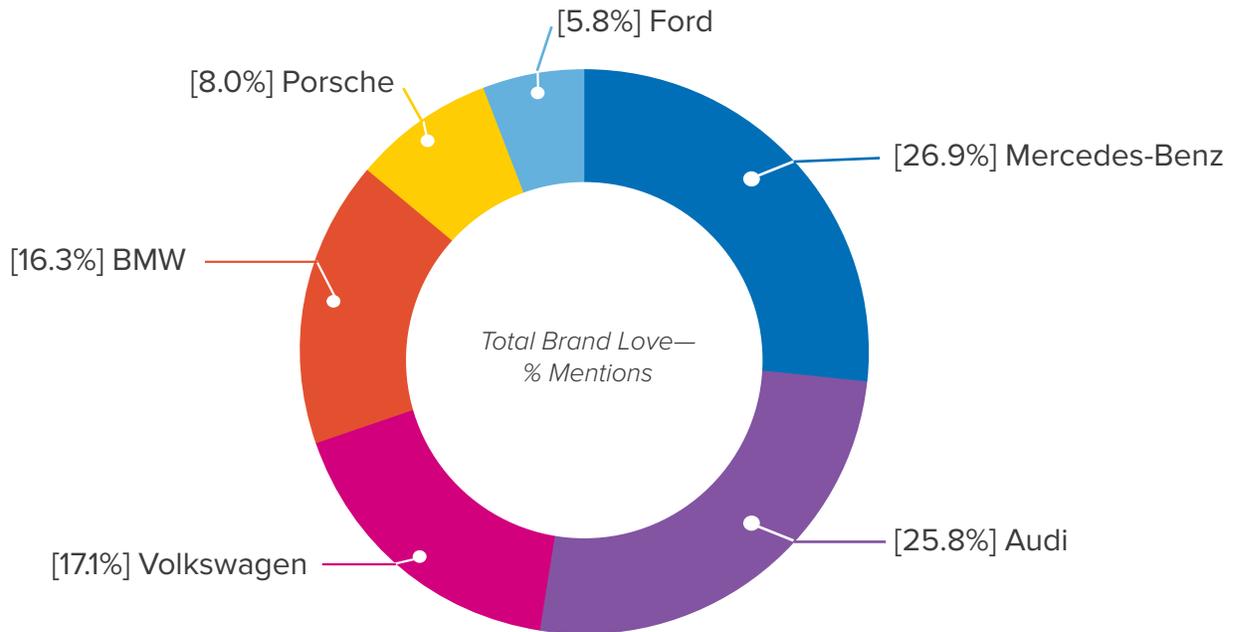
Philips Sentiment Drivers—Things



Automotive Brand Love

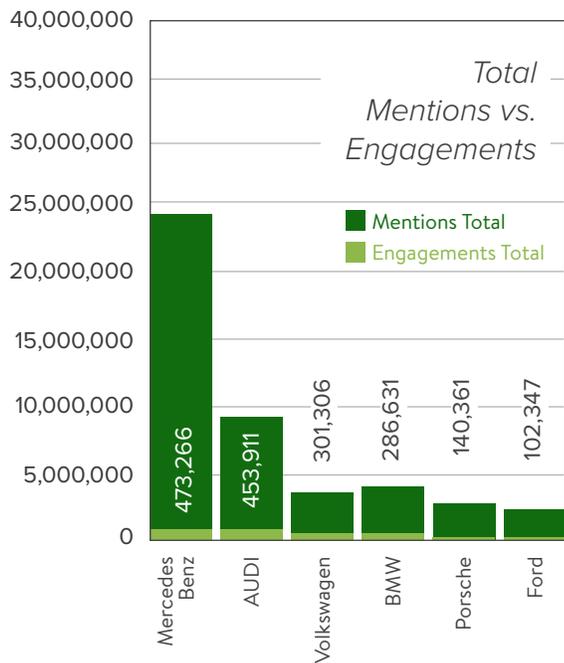


Brand	Social Rank	Mentions (Total)	Sentiment	Reach	Awareness
Mercedes Benz	2	473,266	62	29,968,891,730	23,806,127
Audi	4	453,911	64	8,647,353,500	8,513,236
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Porsche	11	140,361	67	7,307,796,348	3,065,173
Ford	15	102,347	70	5,062,019,842	1,753,969



Mercedes Benz took the highly-coveted German most loved automotive brand last year, growing market share and sales. Audi and BMW, even with weaker sales remain desirable investments. Volkswagen—albeit its sales slide and loss of market share owing to its emissions scandal—still held onto its top carmaker status. Despite its abysmal comparative net sentiment, VW ranked third most loved auto brand, overtaking BMW only by a slim margin.

Confirming Mercedes-Benz winning digital strategy is their market reach, evidenced in their remarkable engagement lift per mention. By contrast, second ranked Audi falls short of generating even half of Mercedes brand engagement.



Rank	Brand	Mentions (Total)	Net Sentiment	Passion Intensity	Total Engagements	Engagements Per Post
1	Mercedes-Benz - DE	473,265	62%	79	23,806,127	1,219
2	Audi - DE	453,911	64%	62	8,513,236	418
3	Volkswagen - DE	301,286	28%	62	3,670,496	236
4	BMW - DE	286,631	61%	74	4,247,890	248
5	Porsche - DE	140,309	67%	90	3,059,005	342
6	Ford - DE	102,439	70%	74	1,746,404	449
Total		1,757,921		Average: 74,833		

Based on the comparative engagements per post—with Mercedes outpacing its competitors three-fold at minimum—a consideration for the other brands would be to analyze their owned/earned media strategy to drive lift in their social media engagement, and thus expand their reach.

Volkswagen, the perennial sales leader in Germany, still trails Mercedes and Audi in Total Mentions—and of these mentions, 4% are negative, with a positive/negative ratio of

2:1, significantly worse than the competition. The data reveals Volkswagen is still reeling in the aftermath of the emissions scandal, trying to regain its footing.

Porsche, although only #24 in the sales charts, ranks 5th in Mentions—a tribute to its high desirability ('Passion' / see chart) and the disproportionate attention new models get from the press and from the general public. Sales stats show Mercedes, Audi and BMW in spots 2, 3, and 4, respectively and this sequence holds true in Mentions.

Mercedes and Audi are neck-to-neck in terms of brand love, with Mercedes leading in affection. This appears to be 'driven' largely by Mercedes' Formula 1 success and the German Touring Car championship.



Audi Sentiment Drivers—Attributes

Hamilton dominates training on Friday. [...] After the clearly best time for the Melbourne-Start Lewis Hamilton also had the fastest lap during the second Free Practice. The Mercedes-driver was more than half a second faster than Sebastian Vettel in his Ferrari. [...]



Post: Life is too short to drive anything else. BMW



From a perception point-of-view, Audi and BMW are closer together—as the Audi word cloud confirms. For both, Positives outweigh Negatives by factor of 5, but BMW's Positives make up 10% of the Mentions (twice Audi's percentage).

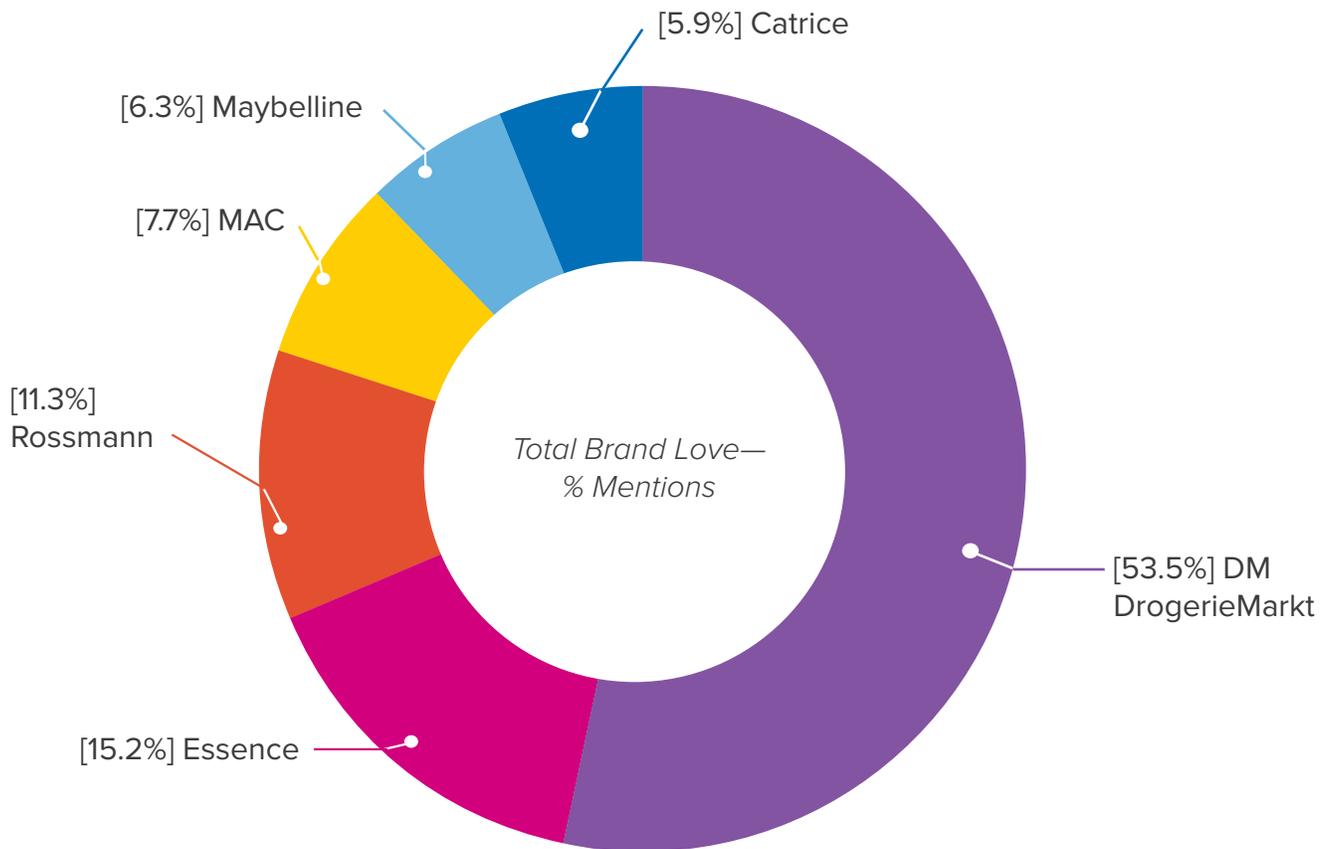
Love Mentions—an indicator of how the entire line-up lacks the excitement associated with a 'sporty' BMW.

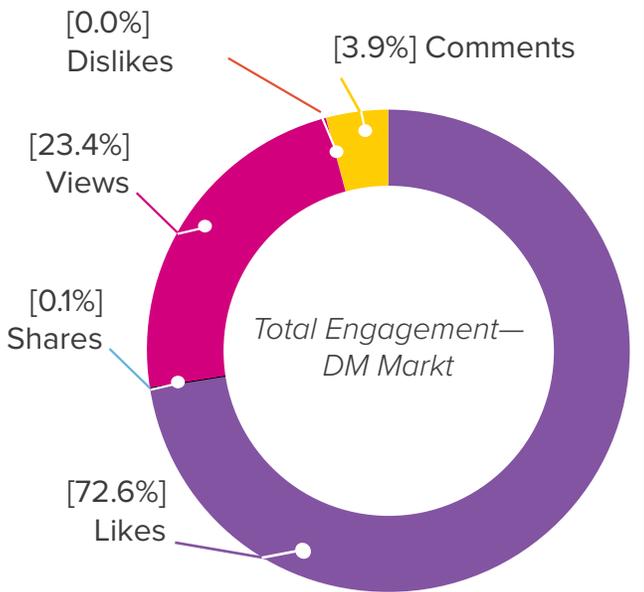
Beauty Care Brand Love



In third place, Beauty is a highly competitive market. Convenience store emporiums like DM Drogerie Markt and Rossmann have captured market share from legacy brands, such as MAC and Maybelline, owing to their aggressive private label brand strategy and digital leverage.

Brand	Social Rank	Mentions (Total)	Sentiment	Reach	Awareness
DM DrogerieMarkt	3	460,959	91	109,746,312	1,036,988
Essence	14	131,254	84	149,724,150	7,672,779
Rossmann	16	97,338	84	1,157,685,007	6,082,427
MAC	17	66,042	96	10,926,667	3,757,517
Maybelline	18	54,518	89	97,459,095	6,980,923
Catrice	19	51,090	85	24,444,931	6,649,219





Top loved DM Drogerie Markt surpasses other leading brands. Private label strategy and digital leverage contribute to customer loyalty.

DM Drogerie Markt and Rossmann are both giant drugstore chains in Germany. DM Drogerie Markt ranks as top loved Beauty brand by social media mentions, and enjoys a loyal and highly engaged consumer.

DM Drogerie Markt and Rossmann both have 25-30 private label brands and carry many others. DM Drogerie Markt carries every brand in this analysis except MAC. Rossmann also carries Maybelline and Catrice.

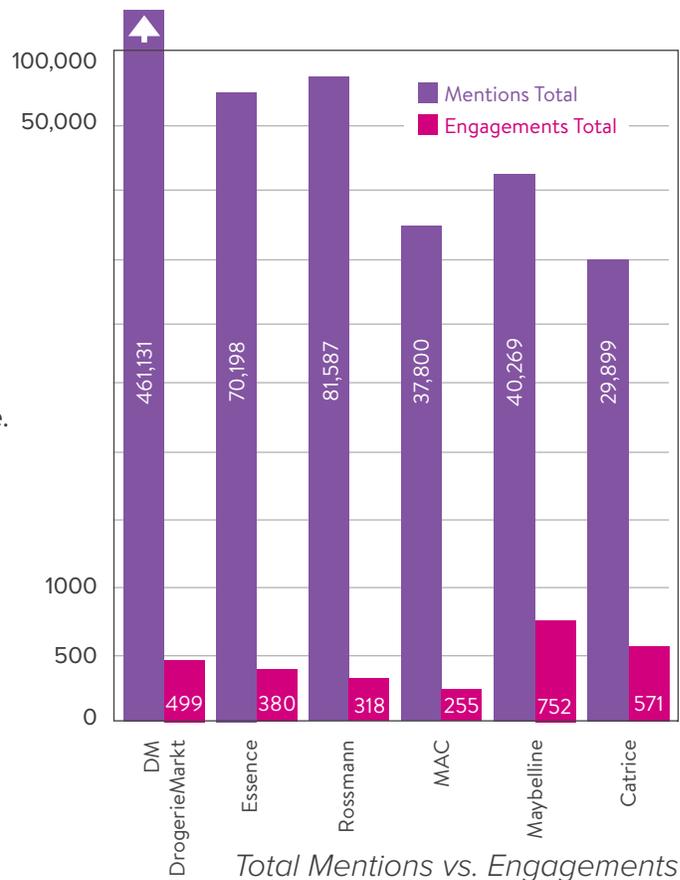
Significantly, while DM Drogerie Markt, Essence and Rossmann lead in total Mentions and Posts, the inverse is true for Maybelline and Catrice, who lead in Engagements per post. In fact, Maybelline, with only 6.3% of overall brand love, leads the category in Engagements Per Post—a 25% lift vs. DM Drogerie Markt’s 12%—indicating DM Drogerie Markt might consider reevaluating its owned/earned media strategy. Maybelline is clearly getting better owned/earned media value, as is Catrice.



Essence, also available at DM Drogerie Markt, is an affordable, fun and quality cosmetics brand. Their no animal testing cruelty free make-up resonates with consumers and translates into significant market share.



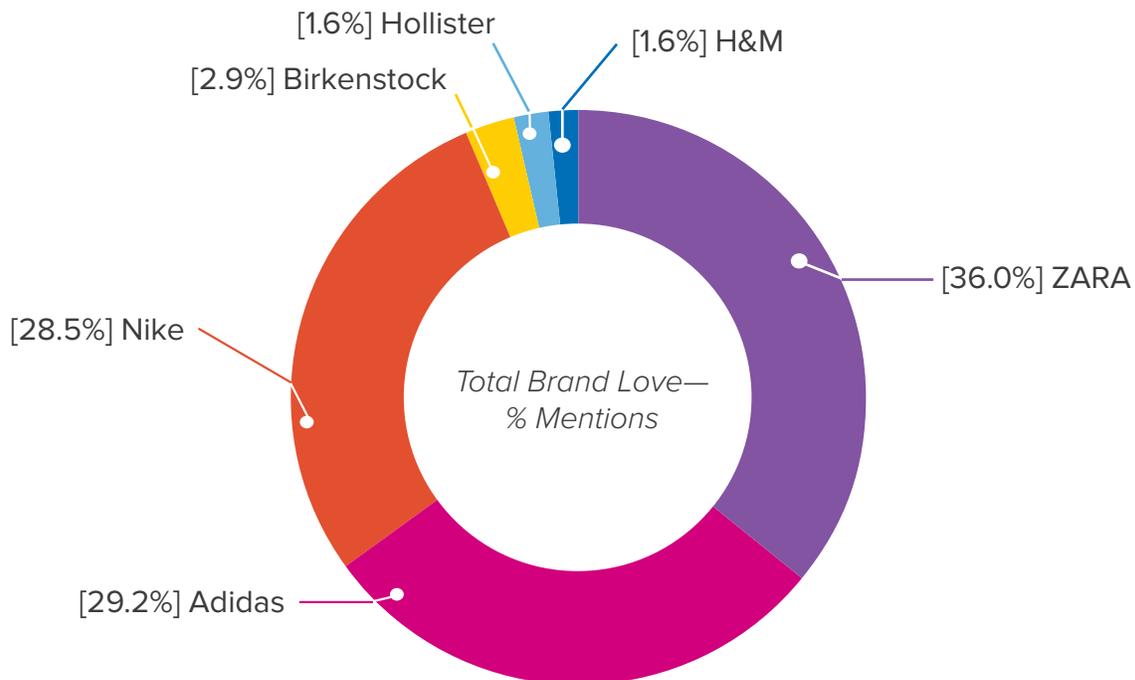
I love Essence Products! At least one product always ends up in my shopping cart.



Fashion Brand Love



Brand	Social Rank	Mentions (Total)	Sentiment	Reach	Awareness
ZARA	9	170,447	80	548,391,375	18,924,588
Adidas	12	138,129	76	3,268,727,643	8,202,110
Nike	13	134,953	77	2,277,880,665	7,535,491
Birkenstock	26	13,643	75	236,233,533	405,937
Hollister	28	8,745	84	32,755,973	1,254,537
H&M	30	7,777	100	31,609,020	1,245,025



Zara Sentiment Drivers—Attributes

Zara is the most-loved fashion brand among 6 leading fashion retailers analyzed in Germany. Price point and fashion forward styles feed Zara’s fast fashion craze and success.



Zara Emotions Cloud

Zara’s fans are emotive in their expression of love for the brand.

Owing to the recent revival of Adidas, the brand inched ahead of Nike last year.



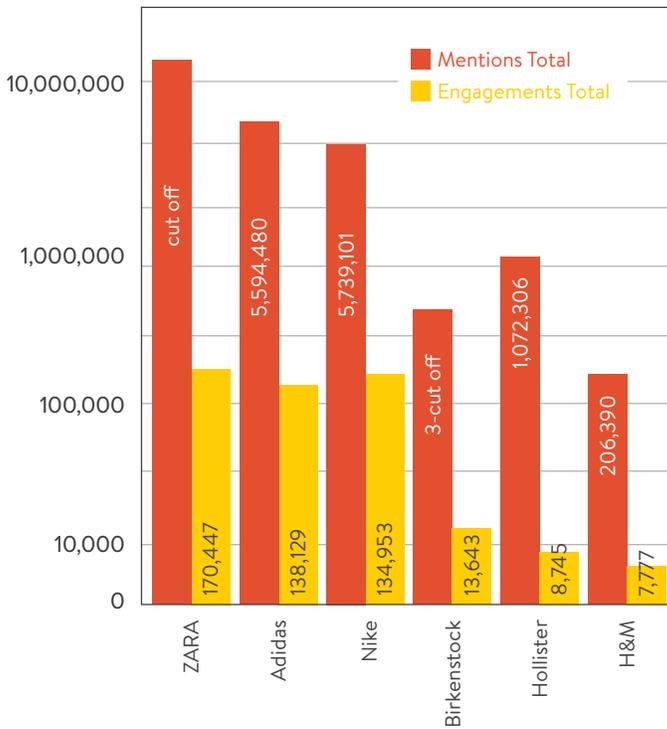
Adidas overtakes Nike. The US-clientele discovers their passion for the retro-shoes. A trend that Adidas targeted purposefully. It was a surprise to Nike who had put its money on the wrong horse, namely basketball sneakers that had been successful for a long time.



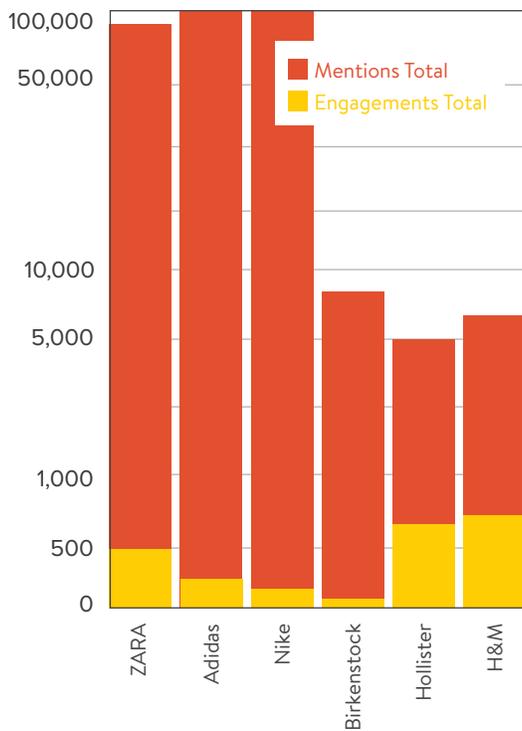
Adidas Sentiment Drivers Cloud—Things

In third place, the German legacy footwear company Birkenstock has been consistently delivering supportive footwear for over 225 years. Historically known for their singular style sandal, Birkenstock has joined the ranks of fashion and now offers trendy styles and colors.





Total Mentions vs. Engagements



Total Posts vs. Engagements Per Post

Despite its fifth-place brand love ranking, Hollister is an indication of the impact brand fans can have on generating reach and influence. With a mere 1.8% of brand love, Hollister, nonetheless, had the largest ratio of Engagements to Mentions.

Earned and paid media ratios are important barometers for media planners and brand directors seeking to track value and reach in comparative media. Here the total volume of posts comprises all media, including video and image posts, relative to the volume of Engagements Per Post.

In this analysis, Hollister has the top owned-to earned-media ratio, generating the highest value of engagements per post.

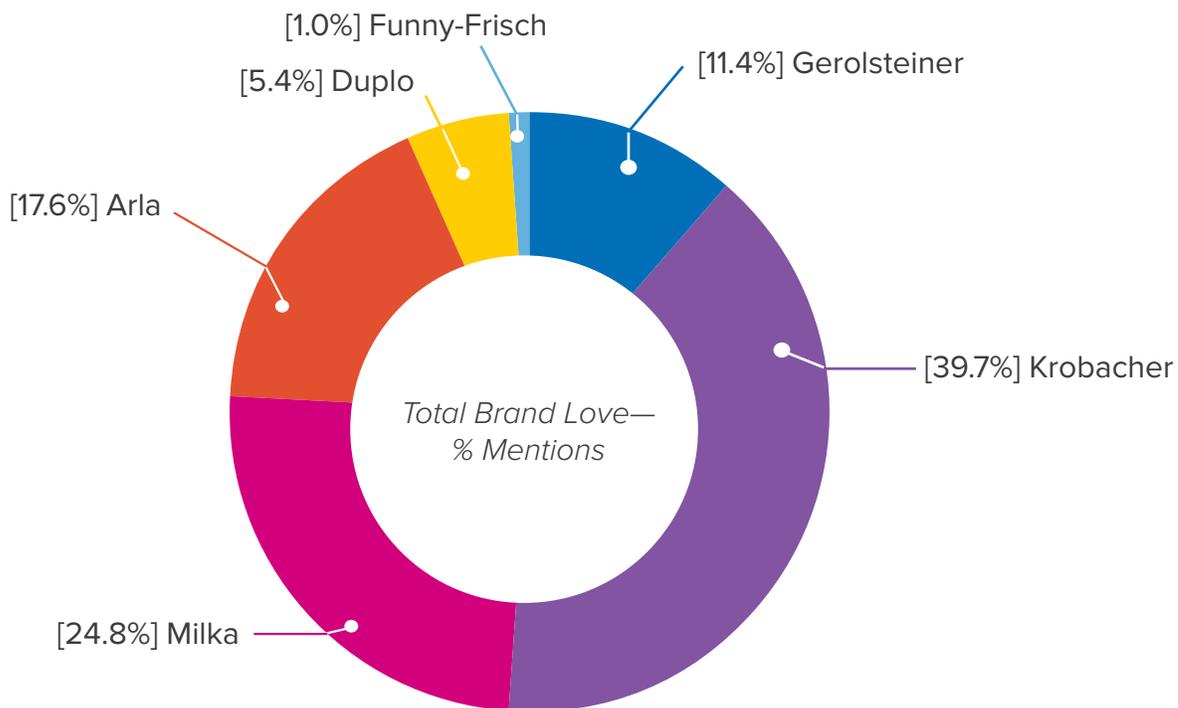
Yet, the analysis reflects a less than optimal return in engagements per post overall. H&M's 2017 earnings slide has prompted overdue digital strategy soul-searching and the admission of strategic digital foot-dragging leading to its lackluster performance.



Food & Beverage Brand Love



Brand	Social Rank	Mentions (Total)	Sentiment	Reach	Awareness
Krombacher	23	29,873	90	165,175,892	237,057
Milka	24	18,637	86	466,750,607	1,483,811
Arla	27	13,234	92	69,155,404	339,321
Gerolsteiner	29	8,598	92	118,320,475	51,702
Duplo	31	4,079	67	38,412,627	127,798
Funny-Frisch	35	756	53	13,535,587	22,148



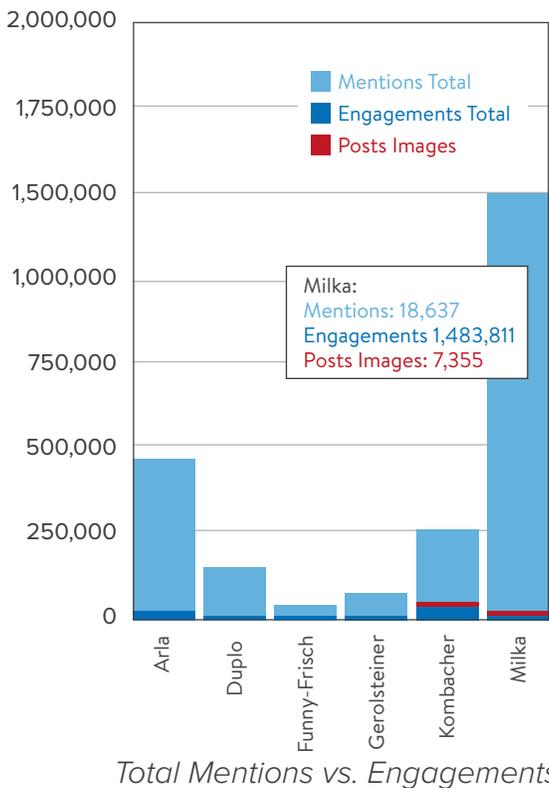
The overriding theme in Food & Beverage could be called ‘tradition with innovation’: All brands on the love list are well established and retain significant market share, attesting to their active digital engagement.





In the lead, Krombacher Beer continued to broaden its portfolio taking advantage of the craft beer movement (“Krombacher Kellerbier”), as well as the trend towards non-alcoholic varieties (“Krombacher 0,0% Weizen”).

The second most loved brand in this category is MILKA, a mainstay in the German chocolate market for over a century, and continues to innovate—introducing new brand extensions and limited editions—yet retaining its core brand identity.



Despite its second-place brand love ranking, MILKA retains an enviable status as the most engaged. The importance of image posts for food and beverage digital brands, notwithstanding, Krombacher—even with 38% more brand love mentions than MILKA—registered less than 50% of MILKA’s image posts. Net result: MILKA outdistanced Krombacher’s brand engagement by an enviable 85%.

Third place, Arla has grown brand love and market share, largely stemming from the popularity of its low-fat, high-protein Icelandic Style Yogurt (“Skyr”), endorsed by health and fitness enthusiasts.



Gerolsteiner Mineral Water is another staple legacy brand that has endured more than a century and is the best-selling mineral water in Germany. Gerolsteiner stays relevant with popular line extensions like ‘Heilwasser’, and innovates premium brand tie-ins, e.g., *Michelin Guide*.



Gerolsteiner synthesizes annual restaurant review data (like the Michelin Guide) to ‘crown’ the best restaurant in Germany (now in its 5th year).

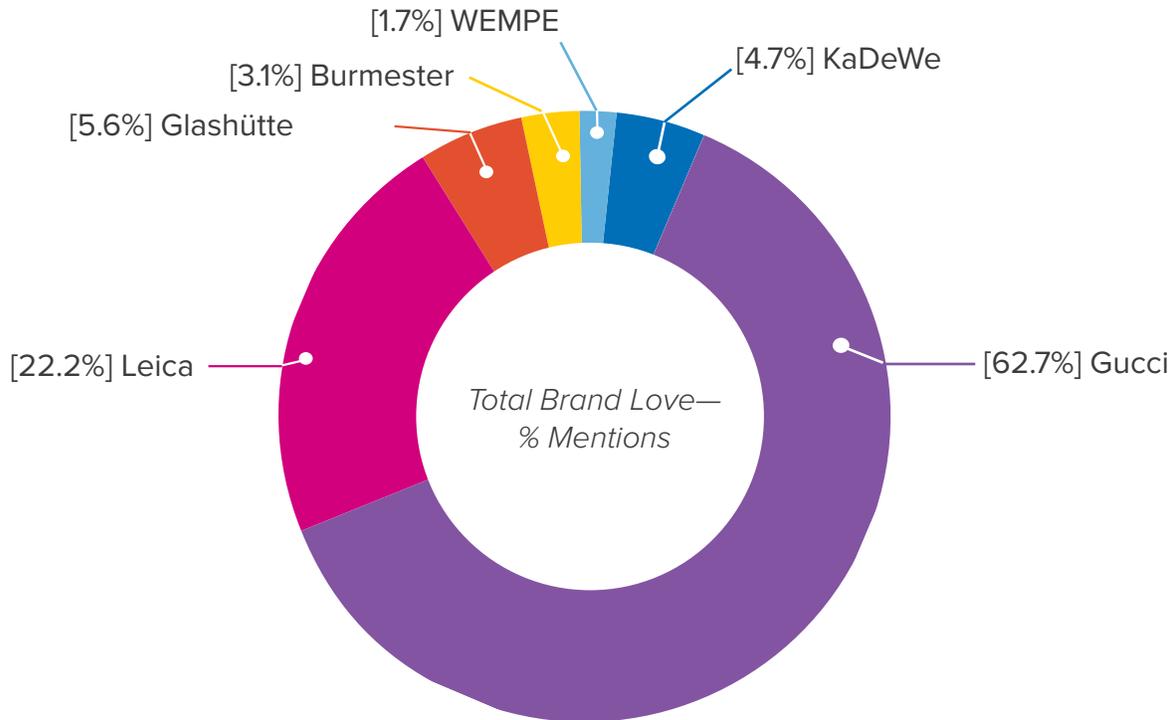
Chocolate maker Duplo’s fifth place ranking attests to its steady digital strategy, while sixth place Funny-Frisch chip is growing market share in the vegan snacks category.



Luxury Brand Love



Brand	Social Rank	Mentions (Total)	Sentiment	Reach	Awareness
Gucci	22	44,359	68	888,646,006	4,242,945
Leica	25	15,726	83	695,172,812	307,746
Glashütte	32	3,949	88	150,647,170	12,801
Burmester	33	2,200	59	58,543,879	22,189
WEMPE	34	1,189	87	39,363,563	24,220
Hulsta	36	341	75	7,634,483	6,011



Even though Gucci has only 5 stores in all of Germany—and these are all in the big cities (Berlin/Düsseldorf/Frankfurt/Hamburg/Stuttgart)—the resurgent designer label is the most loved luxury brand, luring nearly 63% of the industry brand love with its tantalizing, kaleidoscopic and phantasmagoric riff on couture.

Attesting to the power of reinvention in an age of technology revolution, heritage luxury brands like Gucci, Leica, Glashütte and Wempe have an opportunity at reincarnation, as they transform their vision into the 21st Century, and in the process, redefine luxury.



Ranked third most loved luxury brand Glashütte is a 19th Century legacy brand with staying power with a dedicated and socially engaged following.

Burmester Audio Systems manufactures high end audio components and has a partnership with Bugatti, Porsche and Mercedes-Benz. The brand’s potential to build enhanced loyalty and grow market share is contingent not only on its association with luxury car manufacturers, but also in a dedicated digital strategy within the luxury sector which might presume other marketing partnerships.



The Gucci bag is and remains one of my best investments actually. I totally love it and it dresses up every outfit at once.

Measuring [brand] love: The art and science

We can't measure brand love by simply counting mentions or impressions, because as we all know, brands are talked about for a variety of emotional reasons. And not all of them are good.

There is a big difference between 'like' and 'love'—not to mention sarcastic love or hate. And gentle mocking is nowhere near as alarming as contempt. That's why we put our advanced social technology to the test to measure the strongest emotions shared about brands. Love—and every single version of it.

How strongly do your customers really feel about your brand? Have you managed to create consumer passion your competitors envy? Have you cultivated strong customer relationships to set a foundation for future brand growth?

Most consumer purchases are won on emotion. The more passion for the brand, the less the consumer relies on price as the deciding factor. We wanted consumers to lead us to the brands they love most. NetBase analyzed posts across the public social web and measured brand love by filtering into each brand a common set of keywords representative of emotive brand descriptors used in social media to communicate brand passion. The German and English terms filtered are the following:

adorable, adore, adored, adores, adoring, amaze, amazed, amazes, amazing, awesome, beautiful, best, brilliant, cool, crave, craved, craves, craving, delight, excellent, exceptional, excite, excited, excites, exciting, fabulous, fan, fantastic, fave, faves, favorite, favorites, first rate, gorgeous, great, ideal, impress, impressed, impresses, impressing, impressive, incredible, long for, longed for, longs for, longing for, love, loves, loved, loving, luv, luvs, luved, luvd, loving, magnificent, outstanding, perfect, priceless, revolutionary, sexy, stun, super, superb, superior, terrific, thrill, top notch, vital, wonderful, world class

verehrensenswert, verehren, verehrt, verehrten, verehrend, erstaunen, erstaunenswert, erstaunt, erstaunt, spitze, herrlich, beste, brillant, cool, ersehnen, heiß ersehnt, ersehnt, Verlangen, begehrend, begeistern, hervorragend, außergewöhnlich, reizen, aufreizen, aufreizend, aufregend, fabelhaft, Fan, fantastisch, Lieblings, favorisieren, Favorit, Favoriten, erste Klasse, hinreißend, toll, ideal, beeindrucken, beeindruckend, beeindruckt, imponieren, unglaublich, verlangen, verlange, sehnen nach, sehne nach, liebe, lieben, liebt, mag, mögen, liebend, geliebt, überwältigend, ausgezeichnet, perfekt, unbezahlbar, unvergleichlich, revolutionär, sexy, umwerfend, super, krass, superb, überlegen, bombig, hinreißend, erste Sahne, prima, unverzichtbar, wunderbar, spitze, Weltklasse

We only included the mentions where love is an insight for the brand, not just a keyword. That means we know that 'Man toyota trd trucks are beautiful', shows love for Toyota, but 'a beautiful bird just landed on my Toyota'—does not.

Methodology:

This study was designed to measure Brand Love for Top Loved German Brands in six key German industries. The report is country-specific and the analysis was conducted in German language using NetBase. Data timeline is one year, January–December 2017.

This report includes:

- 5.96 million posts of earned mentions
- 12 months of data (January, 2017 to December, 2017)
- German language posts
- Sources include blogs, forum, microblogs, news, review sites, Twitter, Tumblr, and many others



Trusted by the World's Top Brands

NetBase is the social analytics platform that global companies use to run brands, build businesses, and connect with consumers every second. Its platform processes millions of social media posts daily for actionable business insights for marketing, research, customer service, sales, PR and product innovation.

NetBase is recognized by analysts and customers as the leader in Social Analytics. NetBase was rated a category leader by Forrester in the "Forrester Wave: Enterprise Social Listening Platforms, Q1 2016" report. NetBase was also named a top rated social media management platform by software users on TrustRadius and a market leader by G2 Crowd.



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