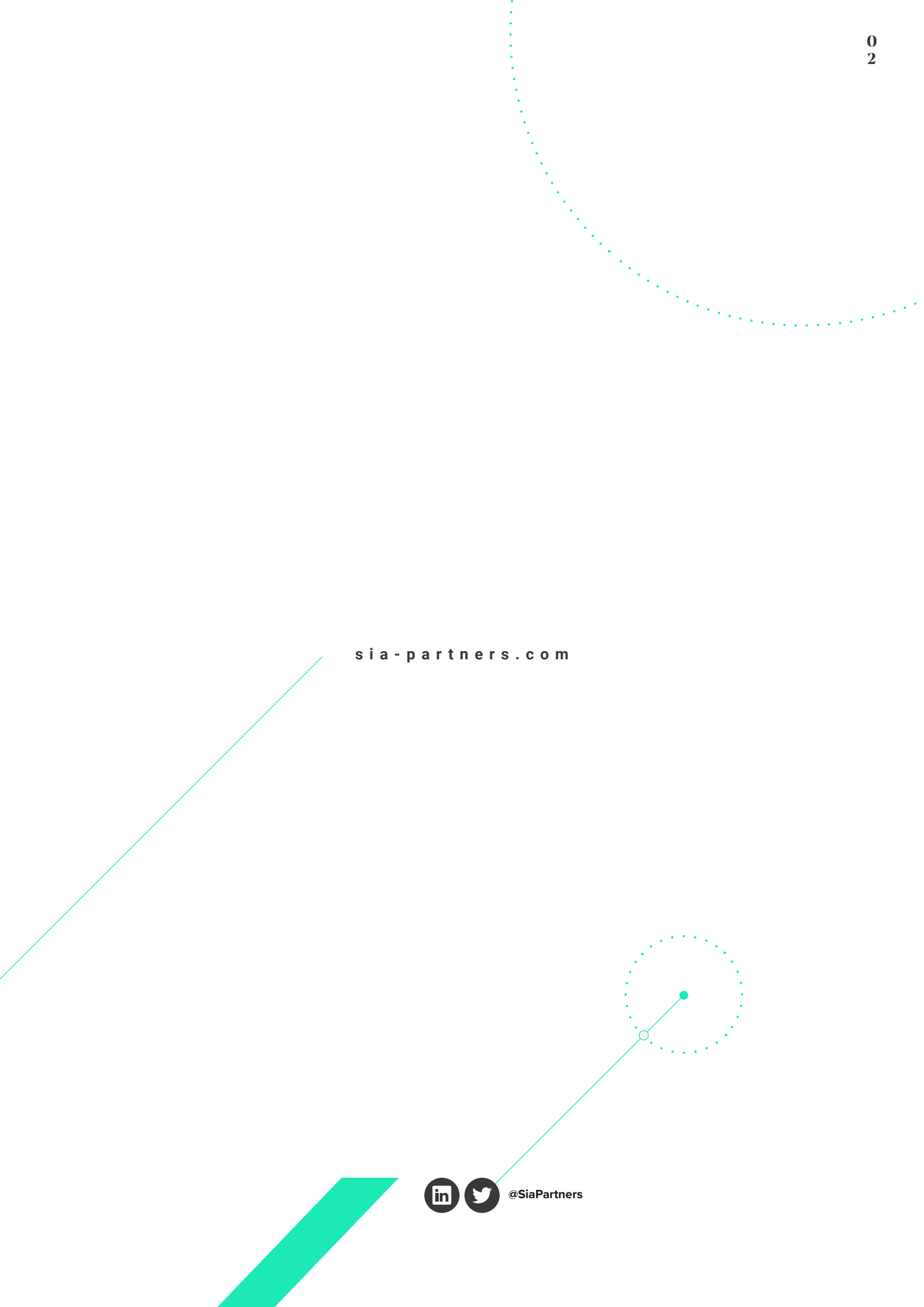


# The Importance of a Strong Digital Brand – Post Covid.

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# Press Release.

## Offline retail hits back

With the opening of physical stores, offline retail is attracting consumer attention again and slowing the growth of the digital power of online brands. Many brands have not been able to continue the digital growth of last year, mainly impacted due to the reopening of physical stores.

How is it that in the aftermath of the pandemic, most brands have had to give up on their digital brand power, and some brands have become stronger post-covid?

The Digital Dominance Benchmark examines the digital brand power of more than 300 brands from 20 sectors using five different categories: website, social media, online video (YouTube), SEO and mobile Apps. Although e-commerce is still the leading sector, we see that their lead in digital brand power is decreasing among almost all analyzed e-commerce players.

This is partly caused by the reopening of the physical stores and the consumer who rediscovered the value of offline channels. While Ikea and Thuisbezorgd.nl made significant gains last year, both brands have seen declines this year. The decrease in take-away and home delivery is partly caused by the reopening of the hospitality industry. The reduced digital growth at Ikea can also be explained by the reopening of offices which is slowing down the high demand for in-home redecorations. Also, the digital brand power of airlines, airports and other players within the travel & booking sector has declined further since the start of the pandemic.

In general, most brands score the lowest in this category despite the fact that YouTube videos are increasingly listed as search results on the first page of search engines such as Google. Hence, there is room for growth here for many brands.






The stagnation of companies' digital brand power shows that it is essential to continue to innovate and digitalize across all relevant channels. The reason for this is the close connection between digital innovation and the consumer experience. Omnichannel alone is not enough. It's about the best possible and complete customer experience. It is essential to be able to attract consumers with a seamless customer journey through an integrated omnichannel experience. In the long term, every company will need to continuously improve its digital brand strength in order to differentiate itself and sustain or strengthen its market position.

# The Digital Dominance Benchmark.

The [Digital Dominance Benchmark](#) is conducted annually by [Sia Partners](#), an international management consultancy firm.

In the benchmark, companies are assessed on five different categories: website, social media channels, online video, SEO (search engine optimization) and apps. Within these categories, more than 50 key performance indicators are measured, which are aggregated into a total score: *The Digital Dominance Benchmark Index*.

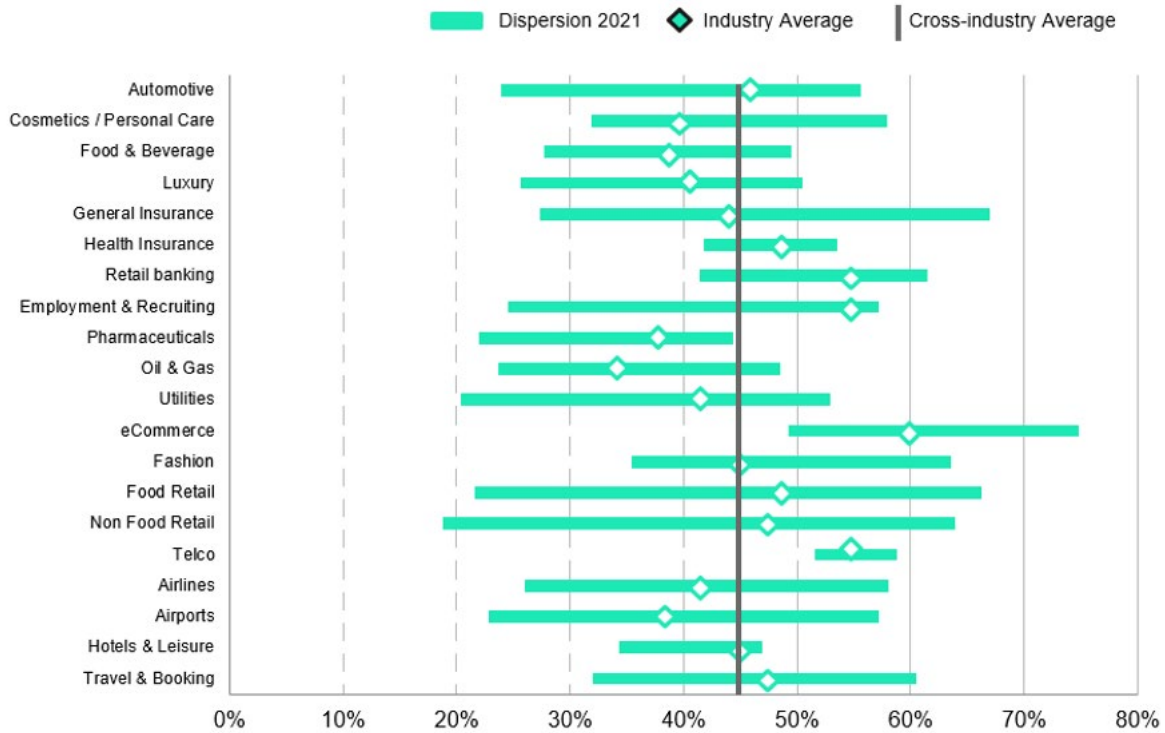
Some examples of the KPIs can be seen in Figure 1. The total score per category results in the total **Digital Dominance Index**. This index makes it possible to compare different brands, industries and periods.

	<b>Branded websites</b>	Number of web visits, time visitors spend on website, number of pages visited per visit and how many people leave after seeing one page.	<ul style="list-style-type: none"> <li>Total visits last 6 months</li> <li>Average time on site</li> <li>Average page views per visit</li> <li>Bounce Rate</li> </ul>
	<b>SEO &amp; keyword usage</b>	How does the company score on the mobile readiness and other SEO components such as speed? What is the company's score against keywords used by customers?	<ul style="list-style-type: none"> <li>SEO score</li> <li>Mobile readiness</li> <li>Usability and speed</li> </ul>
	<b>Social Media</b>	How many fans does the company have and how is the fan base growing, how much does the company interact with customers and how effective is the content (and advertising) on Facebook, Twitter LinkedIn and Instagram?	<ul style="list-style-type: none"> <li>Total page likes [Fans]</li> <li>Fan growth YTD</li> <li>Total interactions YTD (likes, shares + comments)</li> <li># posts YTD</li> <li>Average engagement per post YTD</li> <li># interactions per 1000 fans YTD</li> </ul>
	<b>YouTube</b>	How many videos does the company have on its YouTube channel, how many customers have watched them, and how many subscribers does the company have?	<ul style="list-style-type: none"> <li>Subscribers</li> <li>Video views</li> </ul>
	<b>Apps (Mobile)</b>	How does the company creatively use apps to get close to the consumer and how do consumers rate the company's effort?	<ul style="list-style-type: none"> <li>App review score (iOS and Android)</li> <li># app rankings (iOS and Android)</li> </ul>

**Figure 1: Categories of research and key performance indicators**

For each sector, the difference between the brand with the highest and lowest score (the spread) and the average score

is shown. As can be seen, the spread varies considerably per industry. Also, in comparison with previous years, the DDI score per sector is still highly fluctuating with a significant difference between best and worst performing brands in any given sector.



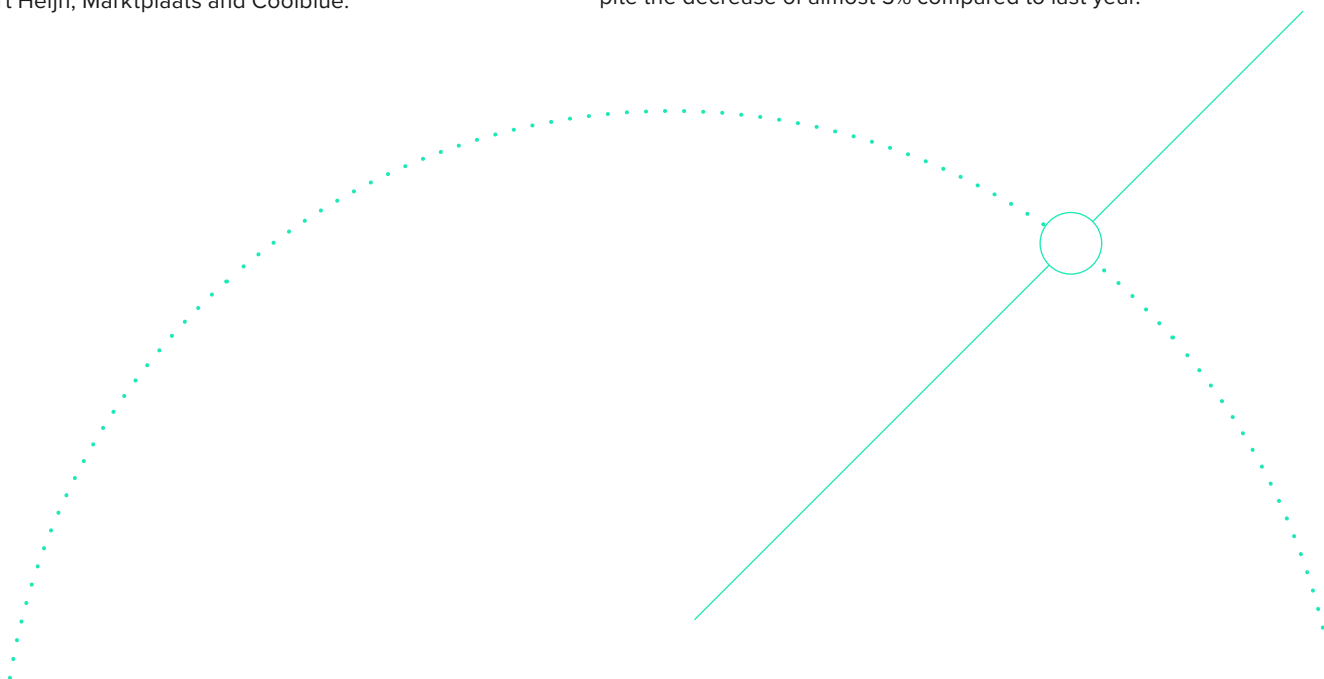
**Figure 2: Average DDI scores and distribution by sector DDB 2021**

Figure 2 visualizes the distribution and average score of the total Digital Dominance Index per industry compared to last year. This year's results show a decrease compared to the previous year.

**Main conclusions are:**

- **Retail** represents four different subcategories; fashion, food-retail, non-food retail and e-commerce. In all categories we see a decrease compared to last year. In the retail sector, we find the best performing brands such as Bol.com, Albert Heijn, Marktplaats and Coolblue.

- Within **Retail**, we see that the best performing subcategory is still **e-commerce**. Despite a decrease compared to last year, these brands continue to focus on their digital brand power.
- We see a further decline at the **airlines** and **airports**. The decline that started with the Covid-19 crisis, still continues in 2021. The travel & booking sector also continues to decline.
- Within the apps, we see that **retail banking** scores very high. This is partly because the demand for online banking is still growing. Almost all banking apps score relatively high.
- **Bol.com** still has a strong digital brand power of 75%. Despite the decrease of almost 5% compared to last year.



# The winners and losers.

Every year, the Digital Dominance Benchmark has winners and losers. Table 1 shows the top 3 brands per sector. The table also shows the highest score and the average score per sector in 2021.

**Table 1: Overview top 3 by sector and highest and average DDI Score 2021.**

Sector	Top 3 in the sector	Highest DDI Score 2021	Average DDI Score 2021
E-commerce	Bol.com, AliExpress, CoolBlue	75%	60%
TelCo	Ziggo, T-Mobile, KPN	59%	55%
Food Retail	Albert Heijn, Lidl, Jumbo	66%	49%
Fashion	Wehkamp, Hunkemöller, H&M	64%	45%
Non Food Retail	Marketplace, Kruidvat, Ikea	64%	48%
Airlines	Air France, Transavia, Emirates	58%	41%
Travel & Booking	Booking.com, NS, Tui	60%	47%
Hôtel & Leisure	Marriott, Fletcher Hotels, Van Der Valk	47%	45%
Utilities	Eneco, EnergieDirect.nl, Vattenfall	53%	41%
Oil & Gas	Shell, BP, Esso	49%	34%
Airports	Schiphol, Eindhoven Airport, Heathrow	57%	39%
Retail Banking	Rabobank, ABN Amro, Triodos Bank	62%	54%
Automotive	Volvo, Mercedes Benz, Tesla	56%	47%
Health Insurance	VGZ, CZ, De Friesland health insurer	54%	49%
Luxury	Chanel, Burberry, Versace	50%	41%
General Insurance	ANWB, A.S.R, Nationale Nederlanden	67%	44%
Employment & recruiting	Randstad, indeed, Timing	57%	54%
Cosmetics / Personal Care	Rituals, Kiko, Clarins	58%	40%
Food & Beverages	Campina, Heineken, Tony's	49%	39%
Pharma	GlaxoSmithKline, Bristol-Myers Squibb, Eli Lilly	44%	37%

The most remarkable insights are:

- The difference between the brand with the highest score (75%) and the brand with the lowest score (19%) is significant. E-commerce has the highest sector average and Pharma the lowest
- The average DDI score per sector varies widely and differs by about 21%

# Analysis by sector.

## Car industry

The automotive industry has a reasonable spread and an overall score of 47%, which is just above the average of all sectors (45%). However, we do see that new, disruptive brands are entering the market. Mainly pure players in the field of electric transport. We have seen a player like Tesla in the market before, but we also measured the new brand Polestar this year, which scores at industry average with a DDI of 47%.

## Banks

Within the banking sector, we see a relatively small spread in DDI score between brands. This means that there are fewer differences between the brands. The average is 54%, which gives banking a relatively better result than other sectors. However, we see that most brands score high on apps and lag in the categories video and social media. With a score of 93%, ABN and ING score by far the best among the apps. Rabobank is the overall winner with a total score of 62%.

## Cosmetics & care

Cosmetics and care brands score lower than most other sectors. With an average score of 40%, it only scores higher than the airports, food & beverages, pharma, and oil & gas sector. We see that many brands do not yet have a local app or are not very active on social media. This brings the overall score down. This can negatively affect the involvement of Dutch consumers, as a global «one size fits all» approach can be less relevant and engaging for Dutch consumers. Finally, we see that newcomer in our benchmark, Kiko Milano immediately scores second place with a score of 53%.

## E-commerce

E-commerce still remains the highest scoring category. With brands such as Bol.com, Aliexpress and Coolblue, the sector represents many brands in the top ten. Within the industry the spread of the scores is large. This means that there is a lot of difference between the brands and their score. For most brands, the score decreased compared to previous years. This is due to the reopening of offline retail.

## Oil & Gas

Oil & Gas is the lowest scoring industry with an average of 34%. We see that in the Oil & Gas industry, people find it difficult to

use the right channels to reach the right audience. Most brands do not have a YouTube channel and also within the category of apps we see that many brands are not or hardly represented. The highest scoring channel within this sector is SEO where Avia, Shell and BP achieve a score above 70%.

## Energy & Utilities

We see that almost all brands have declined in digital brand power and the top three consist of Eneco, Energiedirect.nl and Vattenfall. Apps score very well in this segment. This can partly be explained by the fact that the consumer can use the app to accurately measure their consumption in times of working a lot from home. In addition, we see that there is good scoring on SEO. The brands in this category are strong in this segment and score an average of 71%.

## Pharmaceutical

The brands within the pharmaceutical sector all score below the general average of the sectors. We see that many brands have generally decreased in performance compared to last year. The number 1 of this sector, GlaxoSmithKline (GSK), has shown growth (4%) since last year and especially on apps. Furthermore, we see that Pfizer is declining in overall digital performance (6%) but has increased their score with 18% in the apps category.

## Food & Beverages

The food and beverage sector has one of the lowest scoring averages of the benchmark. With an average score of 39%, the brands within this sector are lagging behind in the digital field. Many brands, which fall under large FMCG companies, do not have their own app. This brings the average down considerably. In addition, we see that SEO for all these brands also scores relatively low if we compare it with other industries.

## Food Retail

Within this sector, Albert Heijn is once again number one. With a high App and SEO score, they easily win against other players in this sector. Within this sector, we generally see a fairly low YouTube score. This is similar to other sectors. In the rather traditional sector, the disruptive newcomers, Gorillas and Flink are new to the DDB. They are online-only players who score high, especially on app. On SEO and YouTube, they are barely or not at all active.



## Hotels & Leisure

The hotel and leisure sector is still struggling after 2020 and has not yet been able to reach the level of the past (2019). We see an average of 45% in this sector. This number is equal to the overall average of the entire benchmark. The spread of the sector is extremely small, which indicates high competition. The highest scoring brands are Marriott, Fletcher and Van Der Valk.

## Airlines

Airlines do not score well but are slightly better performing than the airports. With an average score of 41%, they are just below the average of all industries. If we look at specific channels, we see that there is a lot of difference in the scores on SEO. Where AirFrance only scores 2%, Emirates scores 71%. In addition, we see that the airlines within the category website achieve the highest average score.

## Luxury

This year, many brands have been added to the luxury sector. With a total of 16 brands, it is one of the larger categories within the benchmark. Interesting to mention is that the scores are widely spread and the average (41%) is slightly lower than the general average (45%). Compared to last year, the previously benchmarked brands have decreased their DDI score.

## Fashion

Within the fashion category, we see that all brands have experienced a decline. An explanation for this is that many brands do not have a specific app for the Dutch consumer but keep a general app where we measure the traffic from the Netherlands. This traffic has decreased somewhat. Despite this development, we see that consumers still value online shopping. In addition, the reopening of physical stores has also contributed to the decline in online traffic. The best performing brand of 2021 is Hunkemöller with a total score of 62%. The entire sector does not score badly either, with an average of 45%, they match the overall average.

## Non-Food Retail

The non-food retail sector is a high-performing one with an average score of 48%. This is slightly above the overall average of 45%. The brands in the top 3 are Marktplaats, Kruidvat and Ikea. Interesting to mention is that Kruidvat scores a bit lower but straightens out its average with a high score on SEO. In addition, we see that Marktplaats scores well across the categories but lags behind on social media with a low score of 24%. Ikea has dropped a bit compared to last year, which is probably due to the reopening of physical stores and offices.

## Travel & Booking

Despite two bad years, the travel and booking sector still scores above average with 47%. We see that there is a wide spread within this sector due to a few low outliers such as Expedia. As in previous years, Booking.com and Tui still score well.

## Telecom

Of all the sectors considered in the benchmark, the telecom sector has one of the lowest spreads and a high average. This is an indication of the fierce competition between the brands. There are small differences in the performance of these brands. We see that brands such as Ziggo and KPN are still at the top when it comes to digital brand power.

## Insurance

The brands score just below the average. The spread of insurers is relatively large, with several brands scoring far below the overall average. The insurers score highest in the category SEO and YouTube. Interestingly, the average score for apps falls below the general average. While an app can capture many primary customer processes. So there would be room for growth here. Once again, ANWB retained first place within the sector.

## Health insurers

Compared to last year, only one health insurer, Zekur, has improved the overall score. Yet this score is below the industry average. In the end, VGZ scored the highest this year. The DDI scores of Health insurers are all close to each other, with the health insurers scoring the highest in SEO and apps.

## Airports

At the airports, the spread is very large. With Schiphol as the absolute frontrunner. Within the Sector, Schiphol scores highest in almost every category. Only in the social media category, Rotterdam – The Hague Airport scores higher. Within the sector, the score of most brands has decreased compared to last year and the average score of the sector is therefore below the sector average.

## Recruitment & Selection

Most brands in this sector have a lower score than last year. This can be explained by a lower score on social media and in apps. Many brands are internationally oriented and therefore do not have a specific channel for the Netherlands but tackle it on a global level. This means that they are less noticeable among Dutch consumers. The highest scoring brands are Randstad, Indeed and Timing.



# Tables and Graphs.

The benchmark pool: 328 brands in 20 sectors

Automotive	Cosmetics / Personal Care	Food & Beverage	Luxury	General insurance	Health Insurance	Retail Banking	Employment & Recruiting

Pharmaceuticals	Oil & Gas	Utilities	eCommerce	Fashion	Food Retail	Non Food Retail



Average score per industry by category

	Retail Banking	Automotive	Health Insurance	Luxury	General Insurance	Employment & Recruiting	Cosmetics / Personal Care	Pharmaceutical	Food & Beverages
<b>Website</b> Weight: 25%	49,0% →	38,4% ↓	45,8% ↑	36,7% ↓	40,0% →	37,5% ↓	34,1% ↓	26,1% ↑	31,7% ↑
<b>Social</b> Weight: 30%	35,8% ↓	38,9% ↓	29,1% ↓	49,1% ↓	29,9% ↓	29,4% ↓	36,2% ↓	38,6% ↓	32,8% ↓
<b>Online video</b> Weight: 10%	46,1% ↑	29,0% ↓	27,2% ↓	41,2% ↑	30,3% ↓	25,2% ↑	30,7% ↓	27,1% ↑	33,7% ↓
<b>SEO</b> Weight: 25%	71,1% ↓	71,3% ↓	70,7% ↑	50,1% ↓	74,6% ↑	72,1% ↓	66,8% ↓	63,4% ↓	68,7% ↑
<b>Apps</b> Weight: 10%	76,6% ↑	50,0% ↓	71,5% ↓	14,0% ↓	26,7% ↓	35,6% →	9,6% ↓	11,0% ↓	7,3% ↑
<b>Overall</b>	53,7% ↓	47,0% ↓	48,6% ↓	41,3% ↓	43,8% ↓	42,7% ↓	40,0% ↓	37,1% ↓	39,0% ↓
							Best Score	2 <sup>nd</sup> Score	3 <sup>rd</sup> Score

↑ ↓ → Industry average as compared to 2020 score

	eCommerce	TelCo	Food Retail	Fashion	Non-Food Retail	Airlines	Travel & Booking	Oil & Gas	Hotel & Leisure	Utilities	Airports
<b>Website</b> Weight: 25%	44,5% ↓	53,1% ↓	45,1% ↓	47,4% ↓	49,9% ↓	46,0% ↓	51,5% ↓	25,0% ↓	31,1% ↓	44,5% ↑	28,8% ↓
<b>Social</b> Weight: 30%	30,1% ↓	36,7% ↓	40,9% ↓	44,9% ↓	43,3% ↓	43,5% ↓	35,1% ↓	15,0% ↓	37,6% ↓	30,1% ↓	35,0% ↓
<b>Online video</b> Weight: 10%	28,1% ↓	58,3% ↓	37,5% ↓	38,7% ↓	41,6% ↑	34,4% ↓	26,5% ↓	24,7% ↓	22,3% ↑	28,1% ↑	28,4% ↑
<b>SEO</b> Weight: 25%	72,5% ↓	79,4% ↑	66,7% ↓	68,3% ↑	60,0% ↓	34,9% ↓	72,6% ↓	67,4% ↓	70,4% ↓	72,5% →	65,3% ↓
<b>Apps</b> Weight: 10%	29,4% ↓	39,4% ↑	49,7% ↓	44,7% ↓	35,0% ↓	38,8% ↓	19,8% ↓	30,2% ↓	23,9% ↓	29,4% ↓	24,1% ↓
<b>Overall</b>	60,0% ↓	54,7% ↓	49,1% ↓	50,9% ↓	48,5% ↓	40,7% ↓	47,0% ↓	33,6% ↓	40,9% ↓	44,7% ↓	39,0% ↓
									Best Score	2 <sup>nd</sup> Score	3 <sup>rd</sup> Score

↑ ↓ → Industry average as compared to 2020 score

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