

The 2025 BERA.ai Brand Equity Report

A Clear Look at Meaningfulness, Uniqueness, and
the Moves That Mattered

2025

The data from the brands we highlighted this year shows a clear and consistent link between brand strength and business performance. The brands with strong equity held pricing power, steady revenue, and loyal customer behavior across categories that rarely move together, which highlights how universal the drivers of brand value have become.

The pattern centers on Meaningfulness and Uniqueness. Meaningfulness reflects how much a brand matters in someone's life, and Uniqueness reflects how clearly a brand stands apart. These metrics sit within the FRMU framework, which also includes Familiarity (how well people know the brand) and Regard (how positively they feel about it). FRMU tracks shifts in brand health as they happen, and this real time signal makes it a reliable predictor of business outcomes.

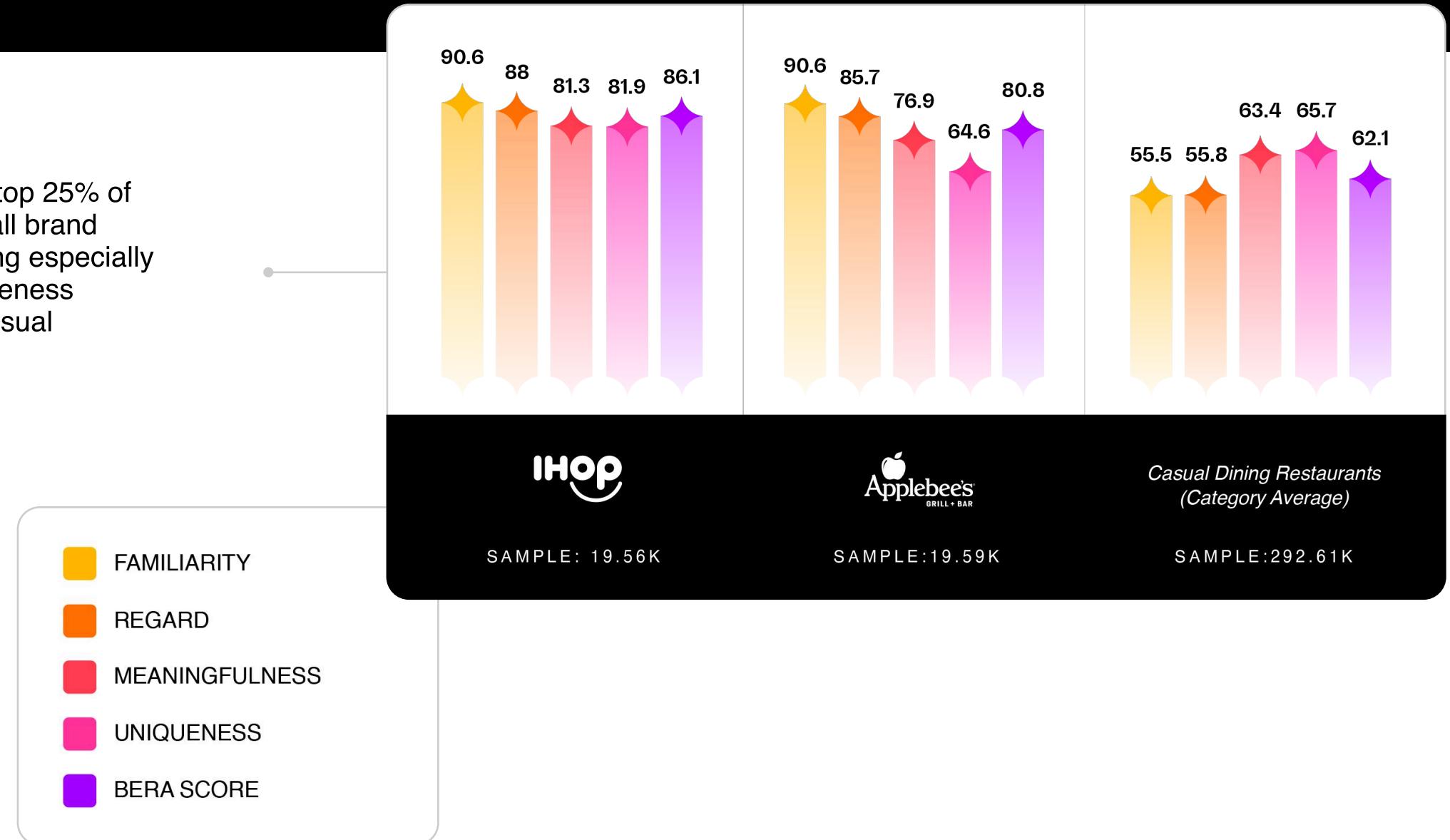
The year's data captured the same movement across many markets. Chase and United Airlines gained strength through shared audience expectations, and Applebee's and IHOP improved efficiency because their customers already acted like one group. Formula 1 expanded its relevance through cultural visibility, while Tesla and Dell lost momentum. These shifts form a clear pattern that shows how quickly brand equity shapes results and how strongly people respond to brands that feel relevant and distinct.

SECTION 2

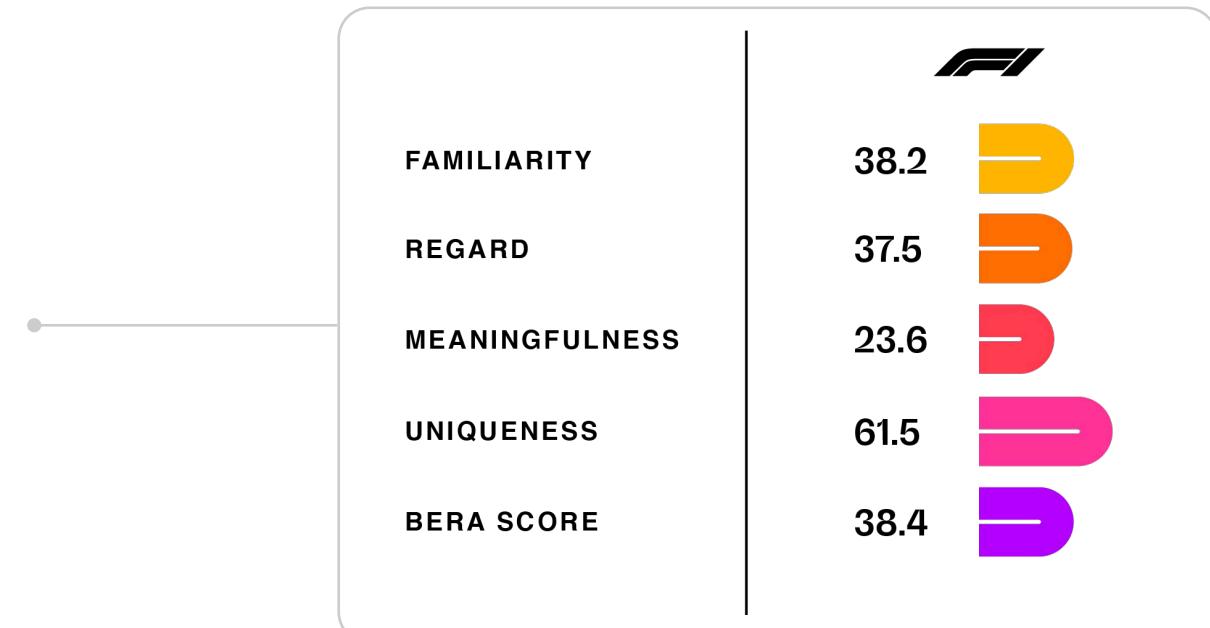
HOW BRAND STRENGTH SHIFTED ACROSS THE MARKET

The charts reveal wide variation in brand strength, and the differences reflect the role of Meaningfulness and Uniqueness in shaping outcomes.

Applebee's and IHOP rank in the top 25% of all brands in the US on their overall brand equity score, with IHOP possessing especially strong Meaningfulness and Uniqueness scores compared to the overall casual restaurant category.



Formula 1's steady rise since *Drive to Survive* premiered on Netflix in 2019 is driven in large part by its high Uniqueness score.

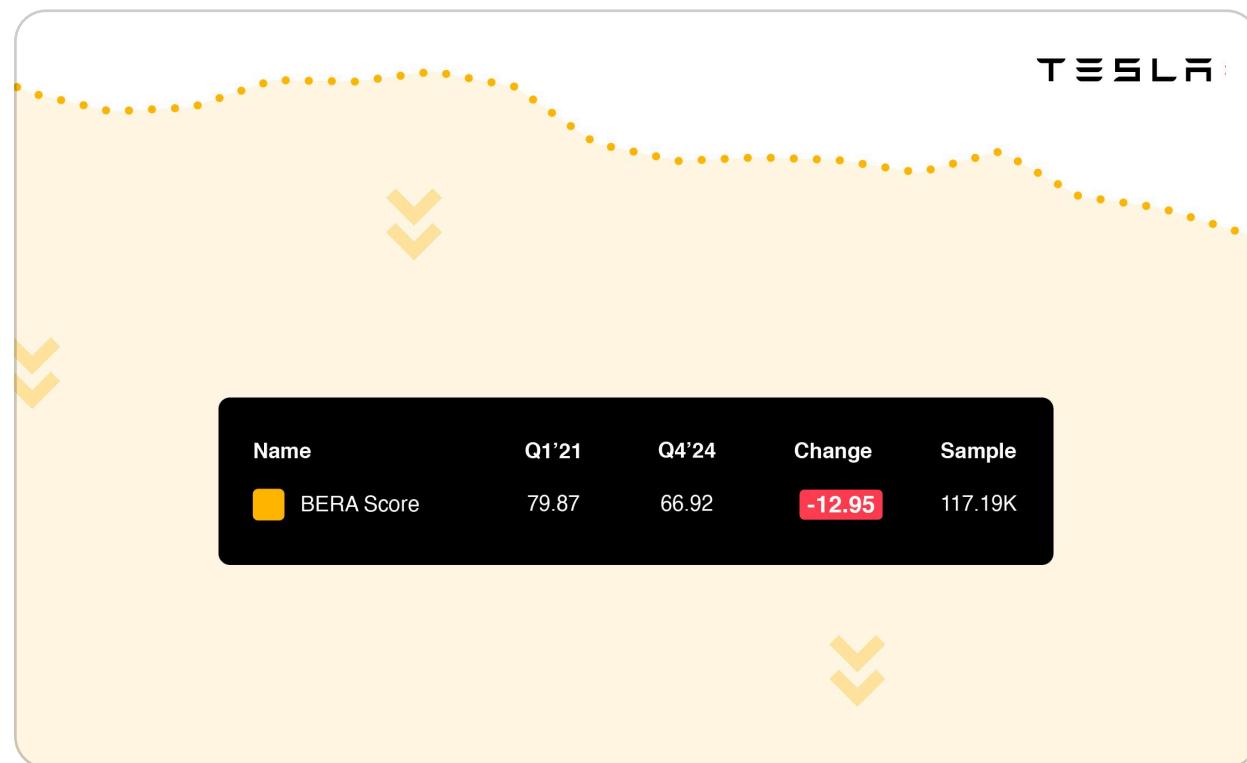


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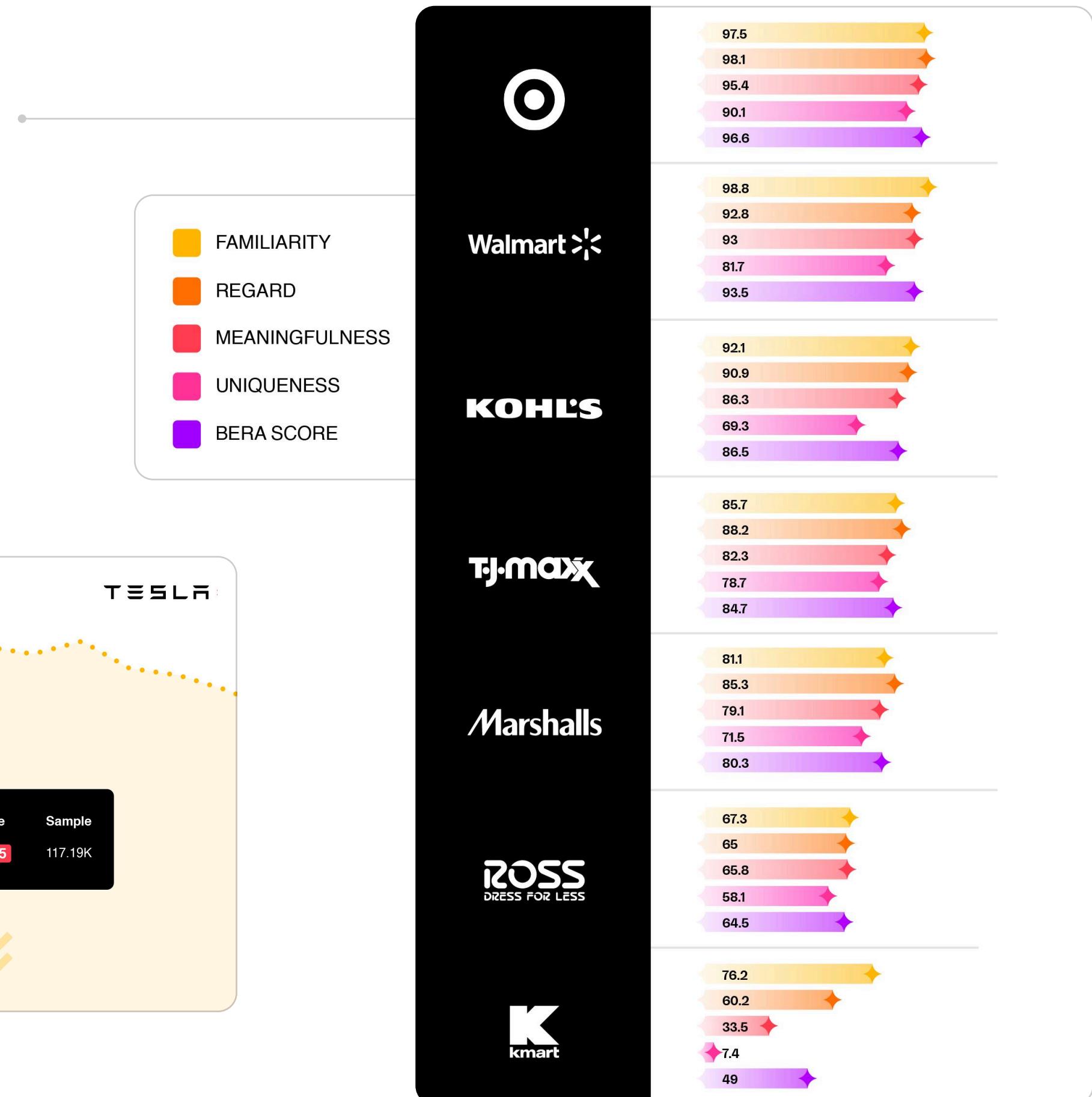
HOW BRAND STRENGTH SHIFTED ACROSS THE MARKET

(cont.)

Walmart is second only to Target amongst high income households. While Walmart's Uniqueness score is not as high as the rest of its brand metrics, that is also the case for its competitors.



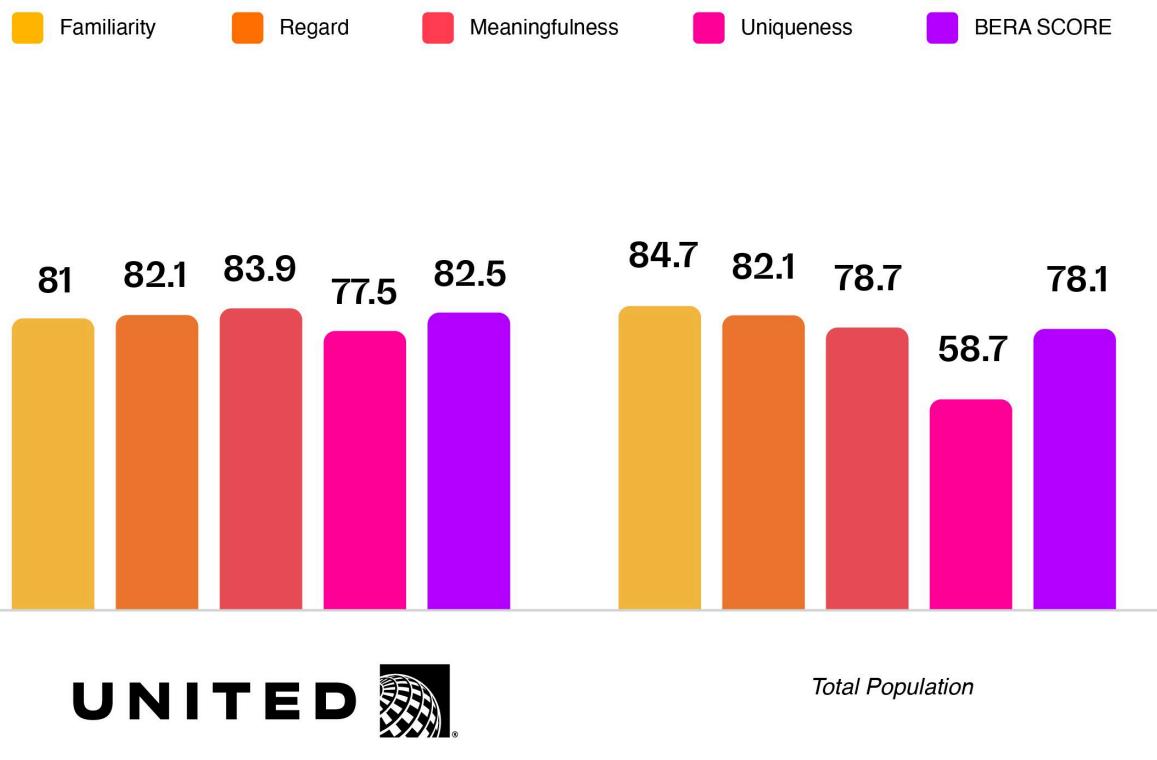
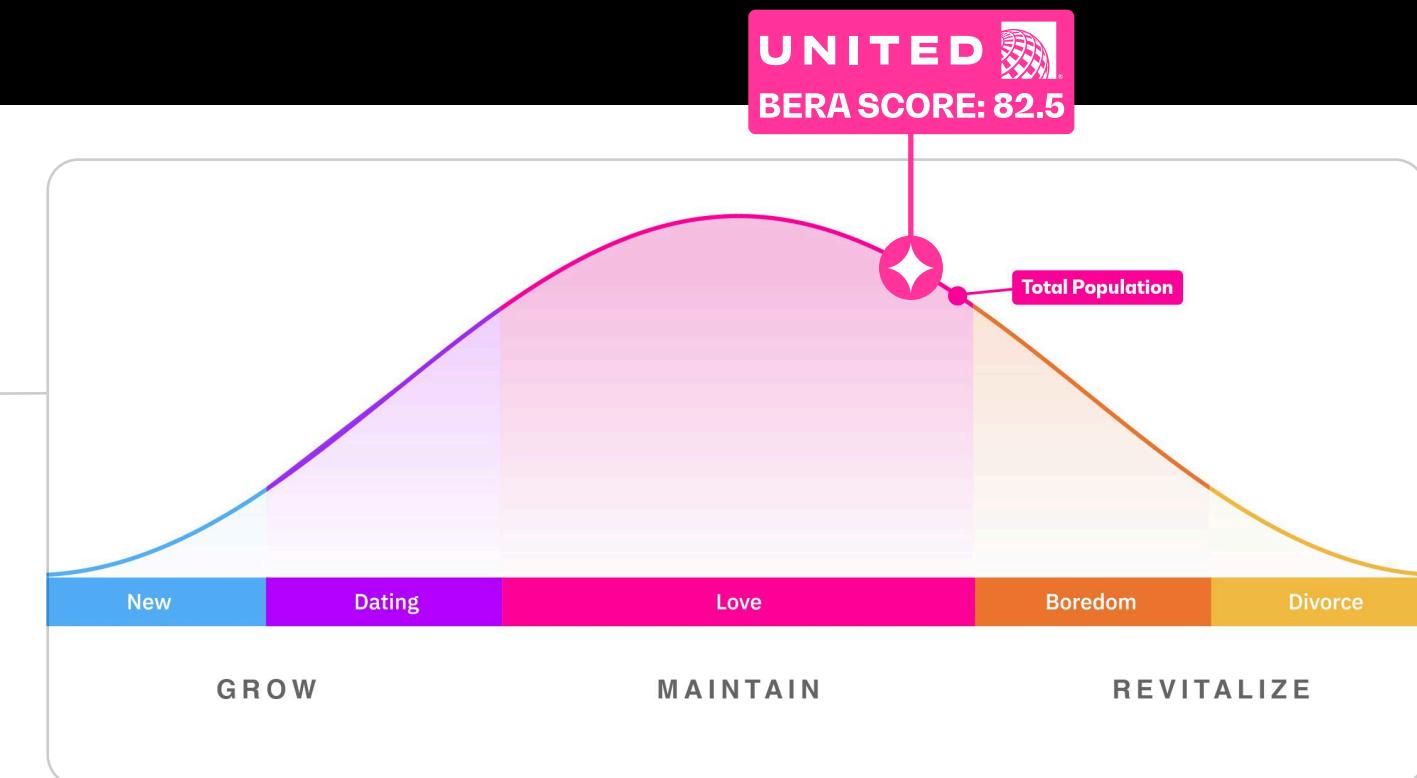
Tesla's case illustrates the impact of lower Meaningfulness, as a 31-point drop in the metric corresponded with a 13-point drop in overall brand equity.



SECTION 3

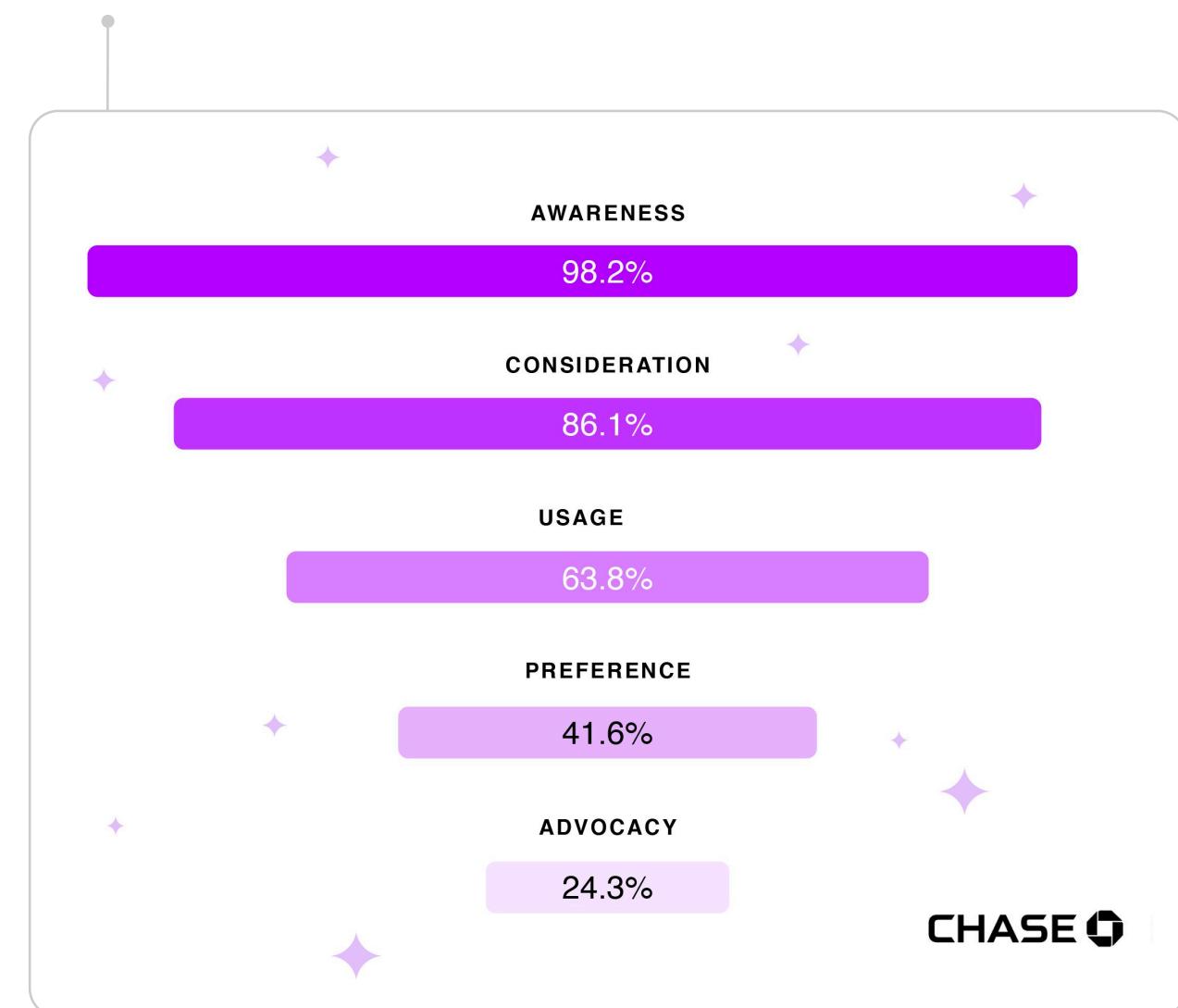
WHAT THE YEAR'S STRONGEST PARTNERSHIPS REVEALED ABOUT SHARED AUDIENCES

Chase and United Airlines advanced their partnership because both brands serve customers who expect reliability and quality, and this alignment strengthens the perceived value of each brand.



United customers see Chase as secure, premium, and intelligent, and this perception increases Chase's Uniqueness within this audience by a significant margin.

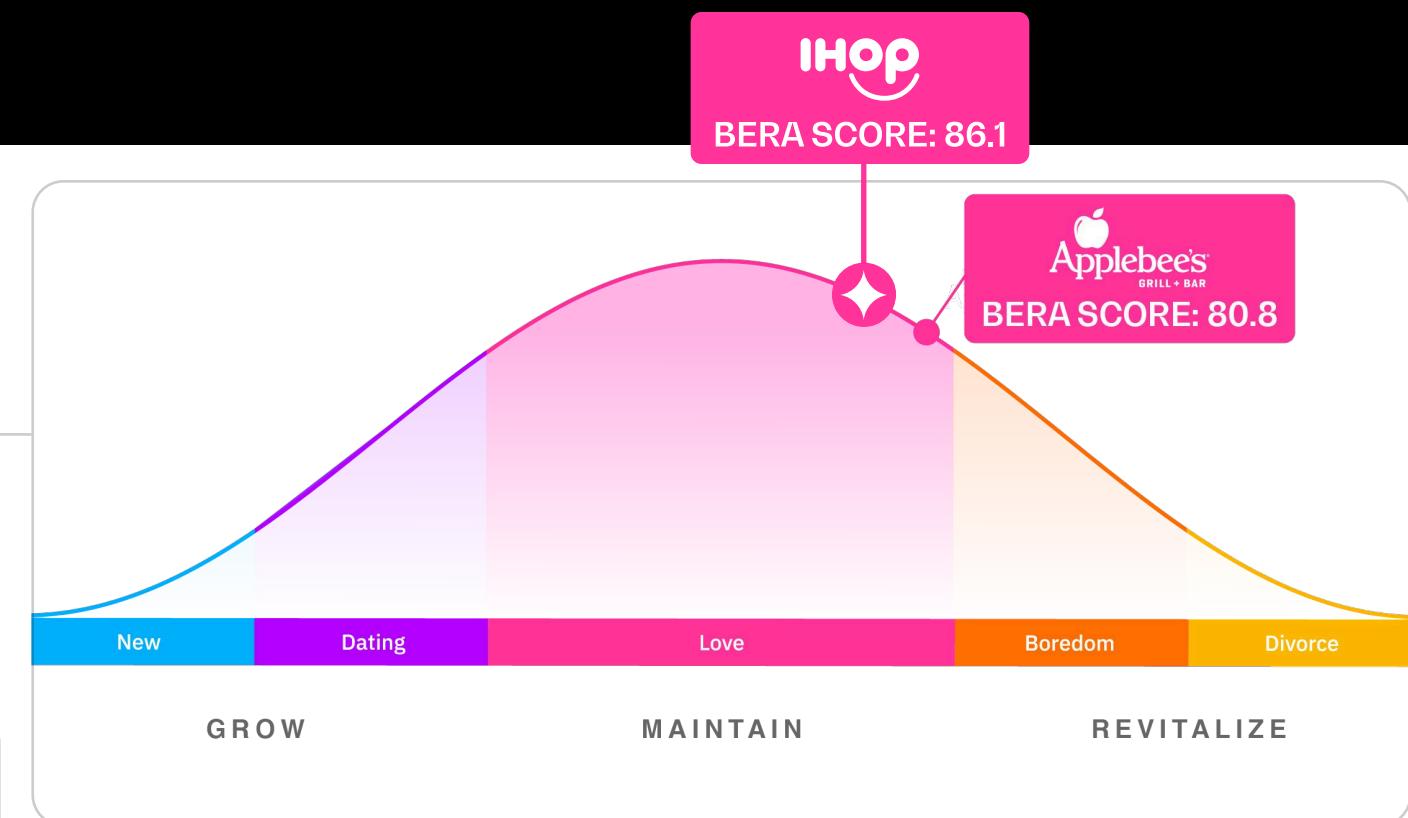
The partnership becomes more effective because each brand supports decisions that connect money and travel, and these moments build Meaningfulness that drives strong funnel performance.



SECTION 3

WHAT THE YEAR'S STRONGEST PARTNERSHIPS REVEALED ABOUT SHARED AUDIENCES (cont.)

Applebee's and IHOP succeed as co-located brands because their customer bases overlap and share similar expectations. Most Applebee's customers consider IHOP, and many visit both brands already.



APPLEBEE'S CUSTOMERS' VIEWS ON IHOP

AWARENESS

100%

CONSIDERATION

90.9%

USAGE

52.7%

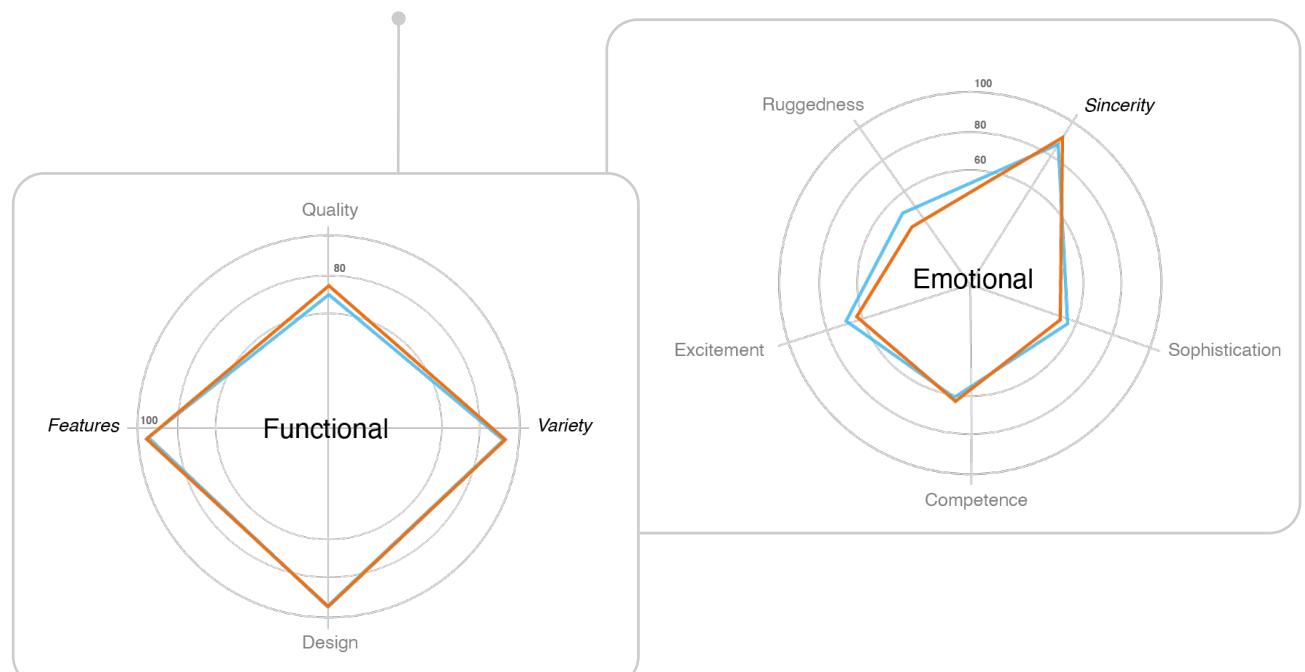
PREFERENCE

30.6%

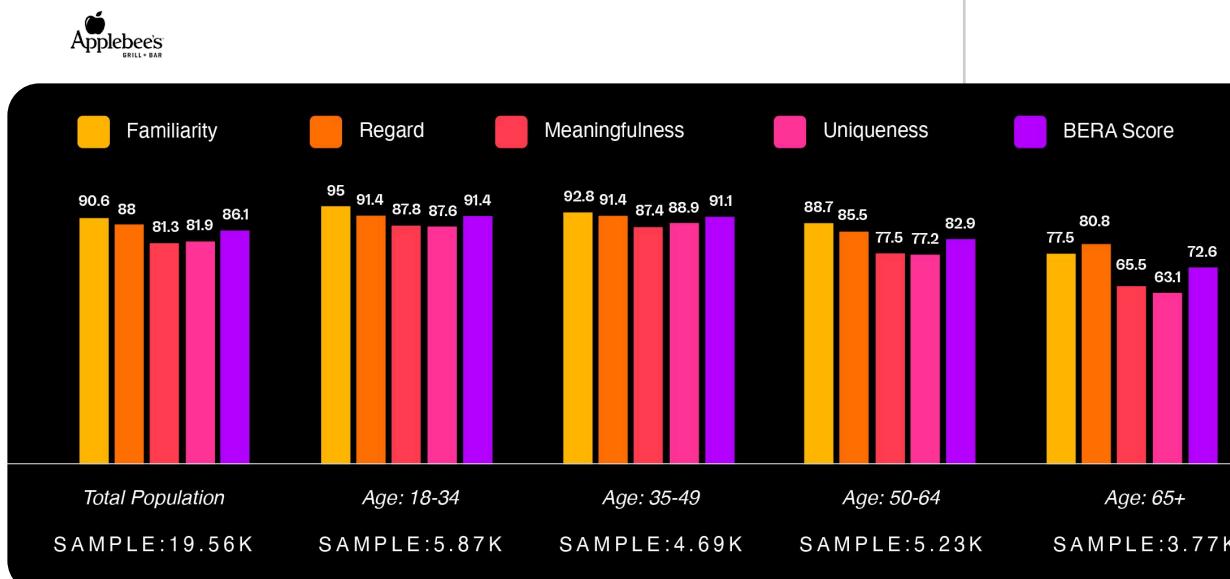
ADVOCACY

17.3%

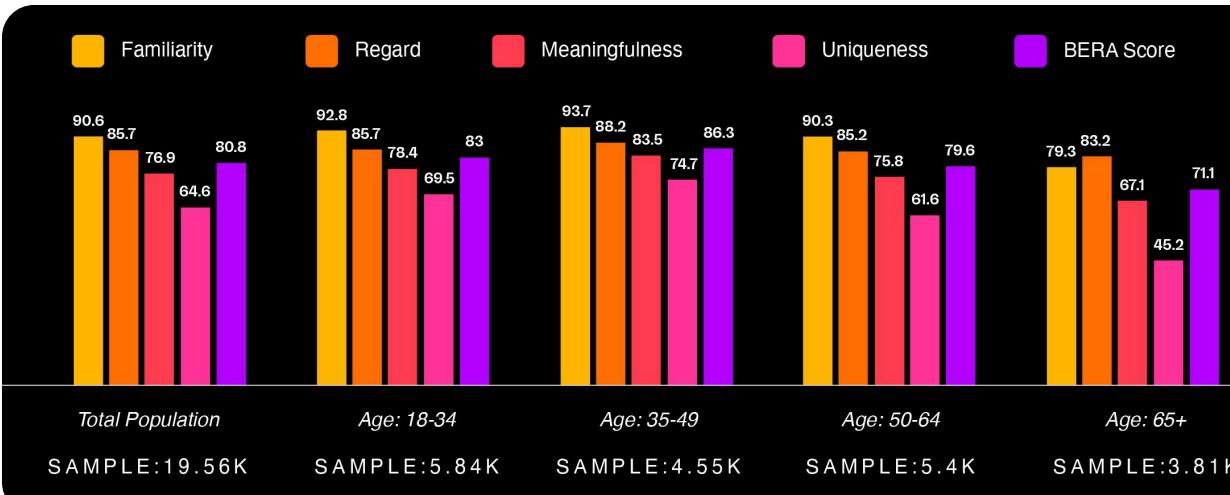
The emotional and functional profiles match with clarity, and customers understand when each restaurant fits their needs.



Breakfast flows toward IHOP, and lunch and dinner flow toward Applebee's. This alignment creates a simple and intuitive experience that supports steady performance across age groups.



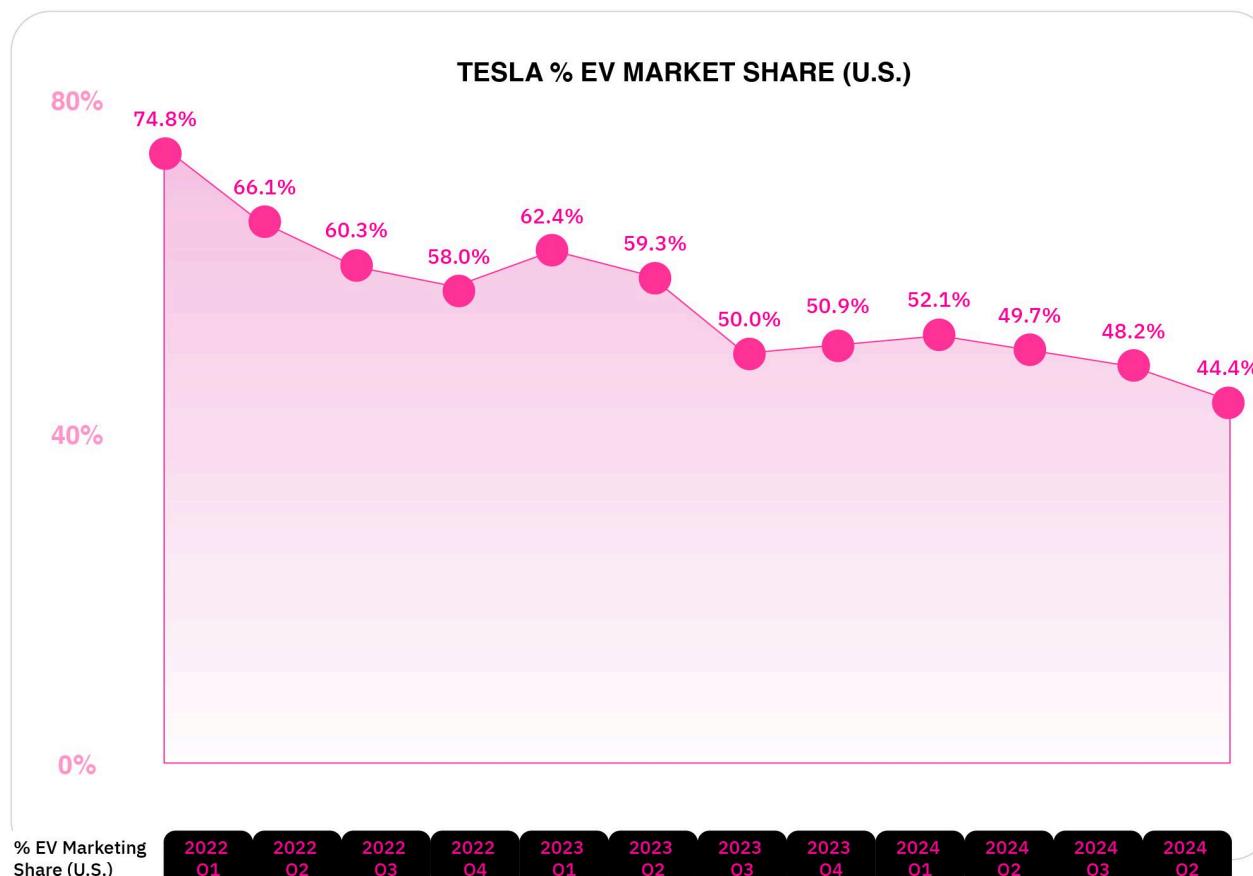
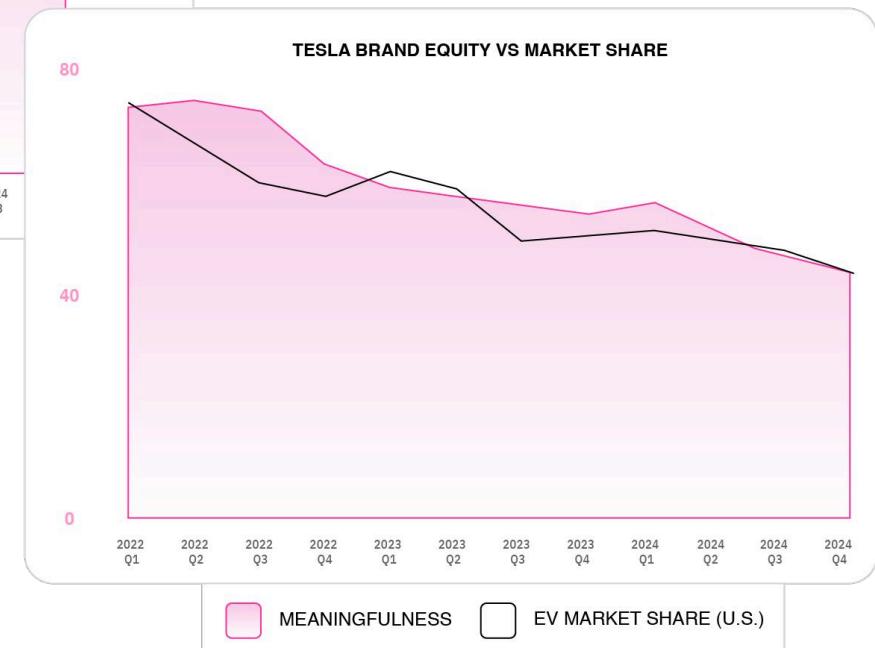
IHOP



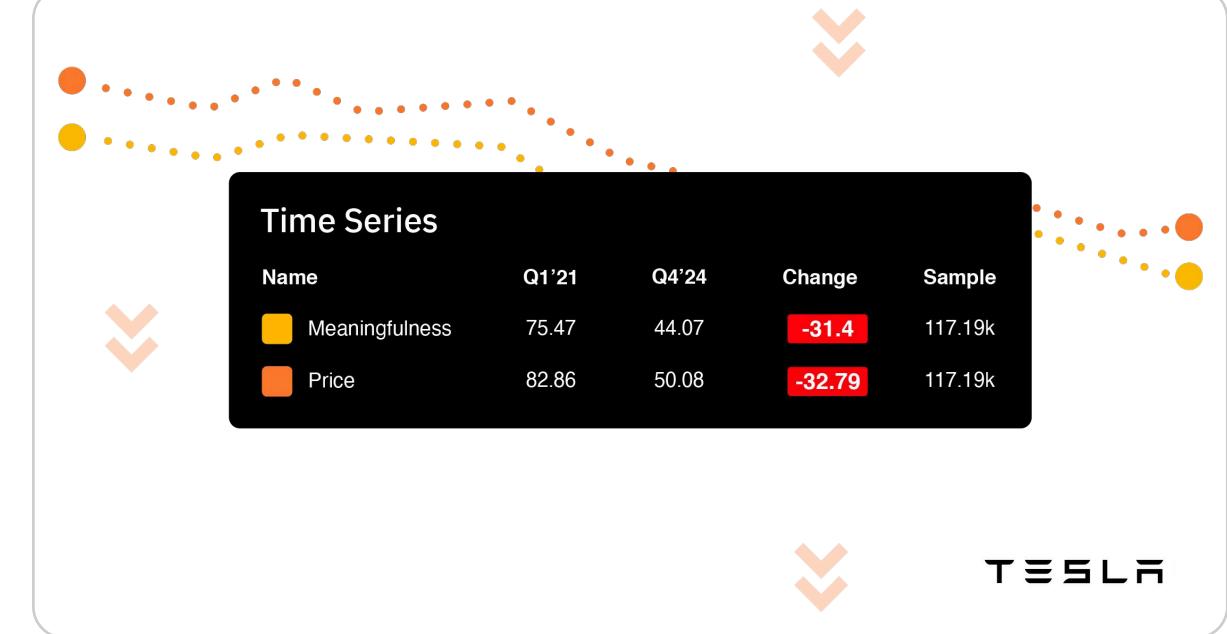
SECTION 4

WHERE BRAND MOMENTUM SLOWED AND WHY IT HAPPENED

Tesla experienced a sharp decline in Meaningfulness while Familiarity remained high, and this shift created a direct impact on pricing power.



Most of the decline in Meaningfulness came from weaker brand positioning rather than weaker products. This erosion shaped performance in a clear and measurable way.

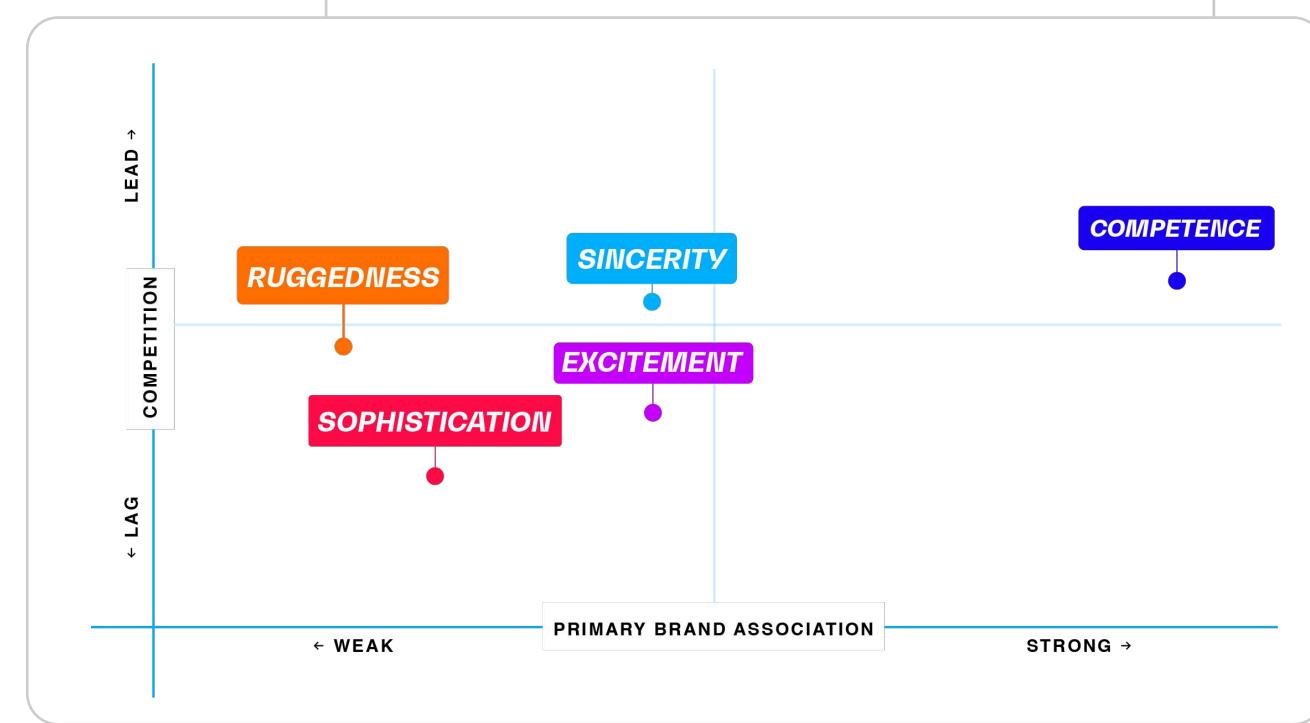


People recognized the brand yet felt less connected to it, and this change reduced their willingness to pay. Tesla responded with price cuts that lowered margins, yet market share dropped despite these adjustments.

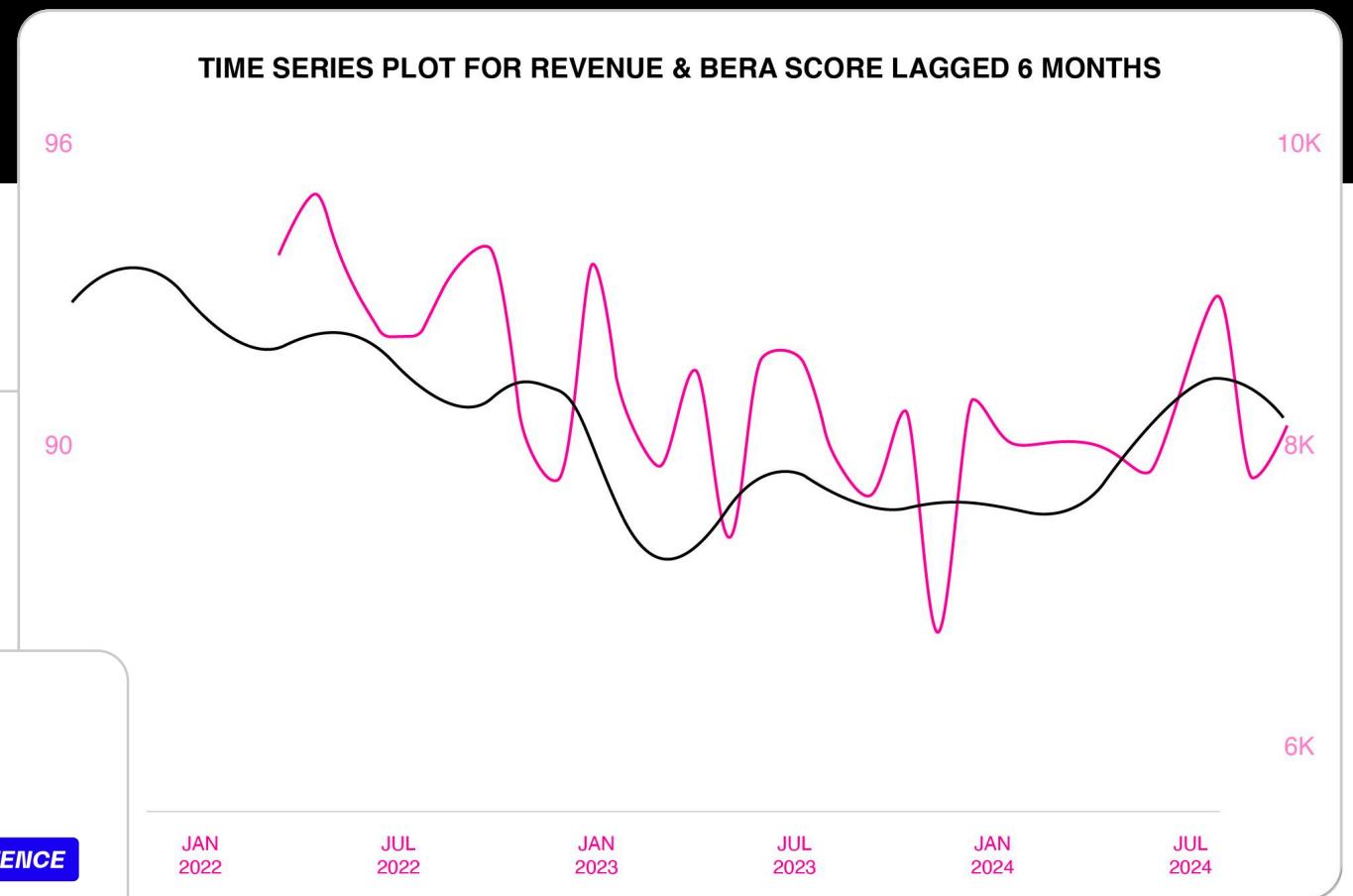
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WHERE BRAND MOMENTUM SLOWED AND WHY IT HAPPENED (cont.)

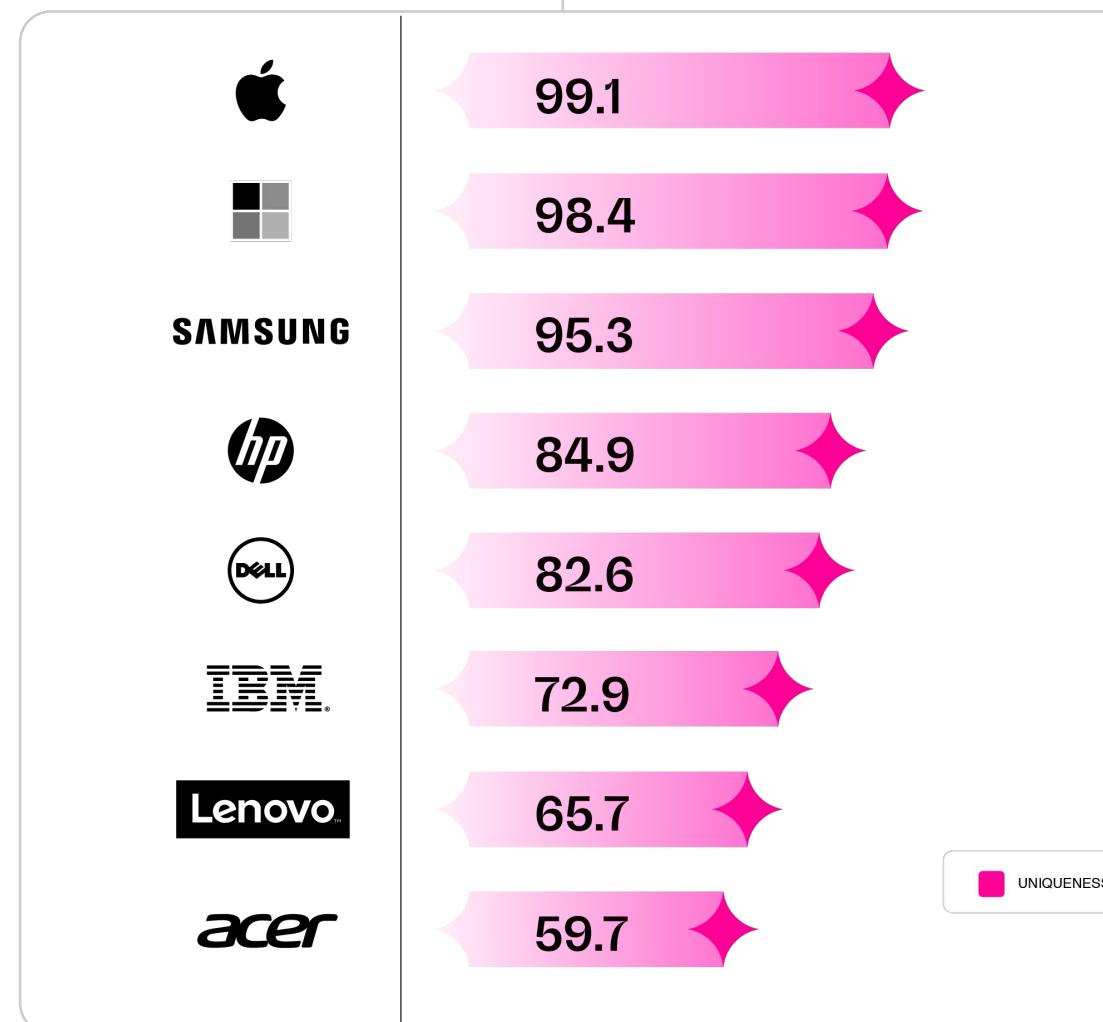
Dell shows a gradual decline in equity that reflects lower emotional resonance with younger adults. These consumers see Dell as competent and practical, yet they do not see the brand as distinctive or personally meaningful.



A 1% movement in BERA Score predicts a 1.4% movement in revenue six months later, which highlights how closely the company's financial performance connects to brand perception.



Lower Uniqueness limits interest and reduces the brand's ability to inspire loyalty.

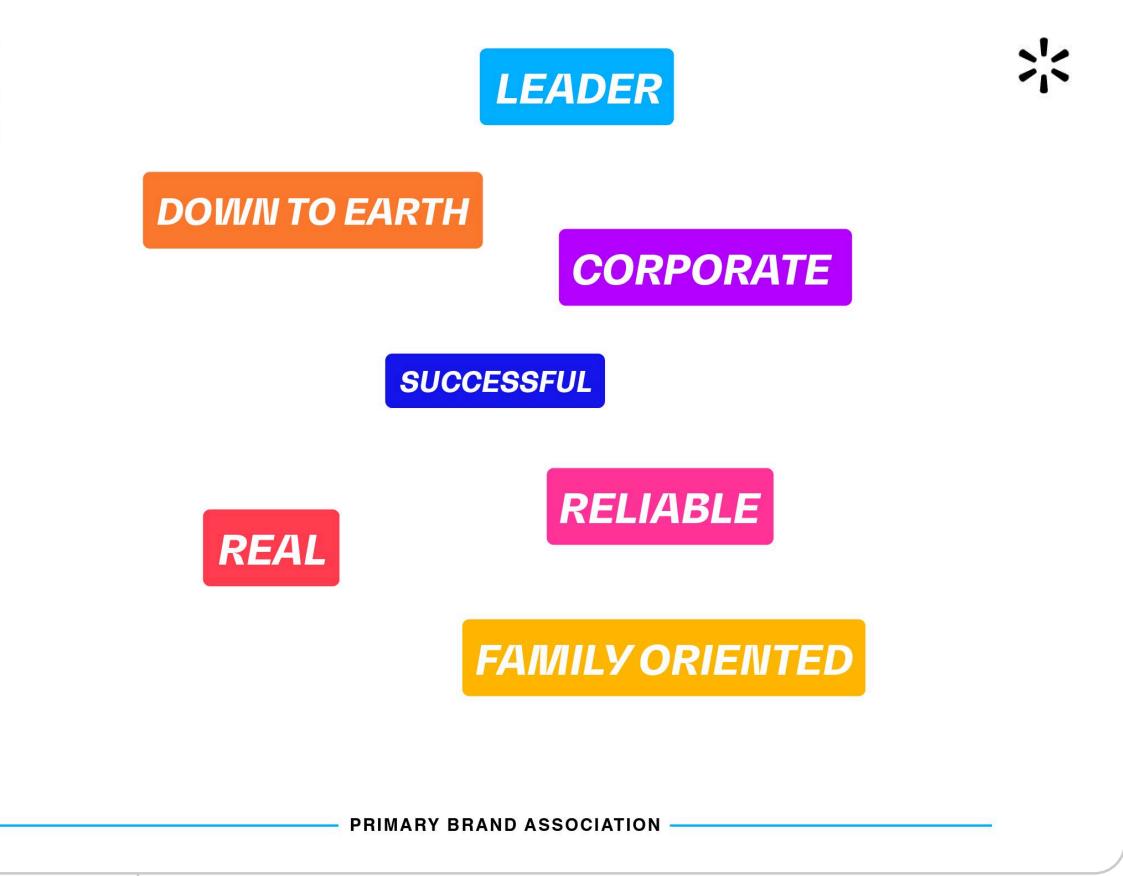
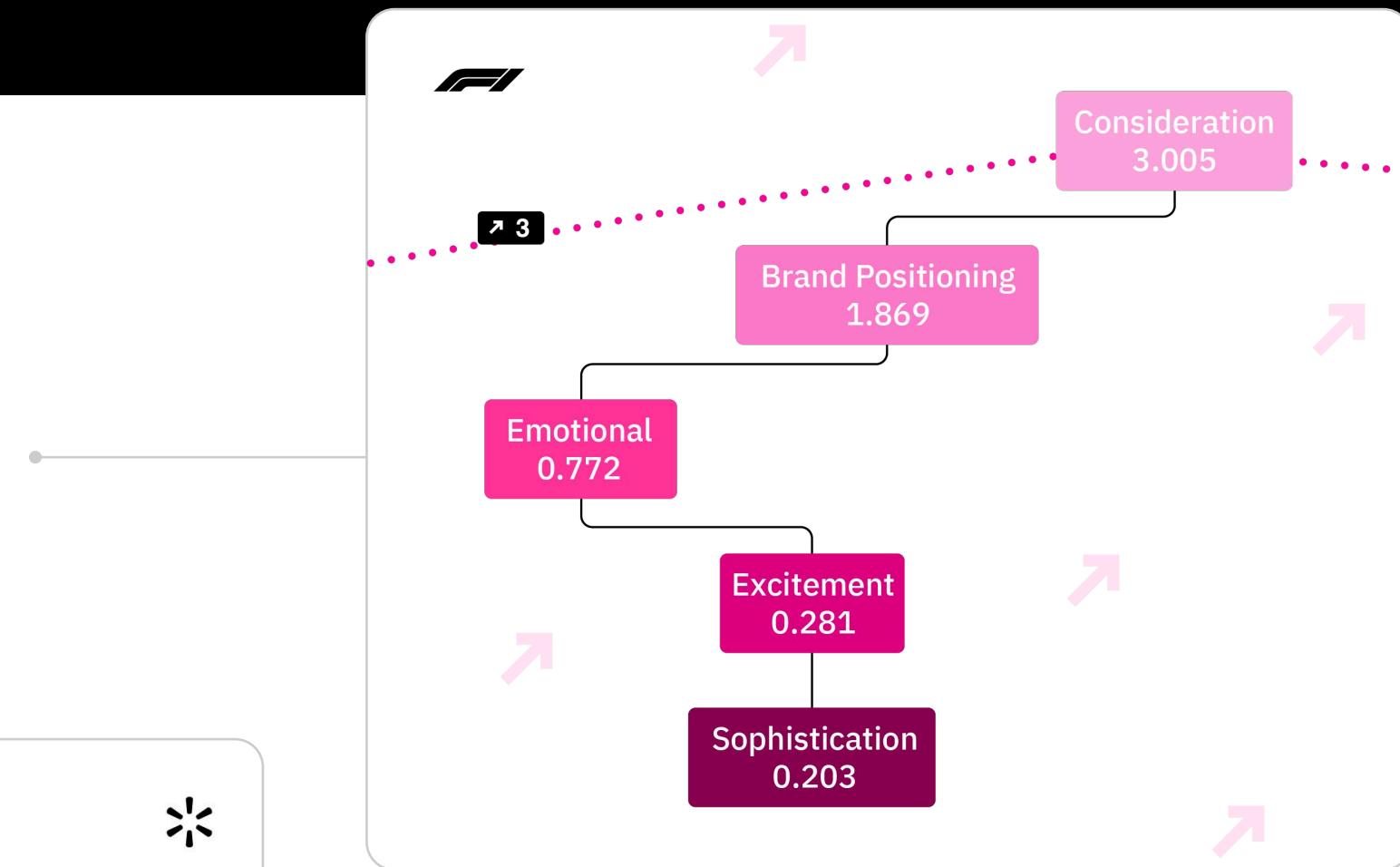


SECTION 5

HOW EMOTIONAL SIGNALS SHAPED CONSUMER DECISIONS

Emotional drivers shape outcomes across all categories, and the data shows how these drivers influence behavior with consistency.

Formula 1 drew new interest because the brand expressed excitement and sophistication in ways that felt authentic.



Walmart gained strength among high income households because people saw reliability and value in daily shopping experiences.



Applebee's and IHOP succeeded in their co-location strategy in part because of the consistency in the way the brands are positioned.



THE CLEAR PATTERN BEHIND THIS YEAR'S BRAND GAINS & LOSSES

Chase, Applebee's, IHOP, Walmart, and Formula 1 advanced this year through clear relevance and strong distinction that gave customers a reason to stay engaged. These experiences reinforced loyalty and produced reliable business outcomes.

TESLA & DELL DID NOT SEE THE SAME PATTERN

Their audiences remained familiar with the brands, yet they felt less connected and less inspired by them. This loss of emotional relevance reduced pricing power and weakened financial results.

THESE CASE STUDIES DEMONSTRATE THE SAME PRINCIPLE IN EVERY INSTANCE

people support brands that matter to them and present a clear identity, and they step back from brands that feel less meaningful or less distinct.

Read the full stories

