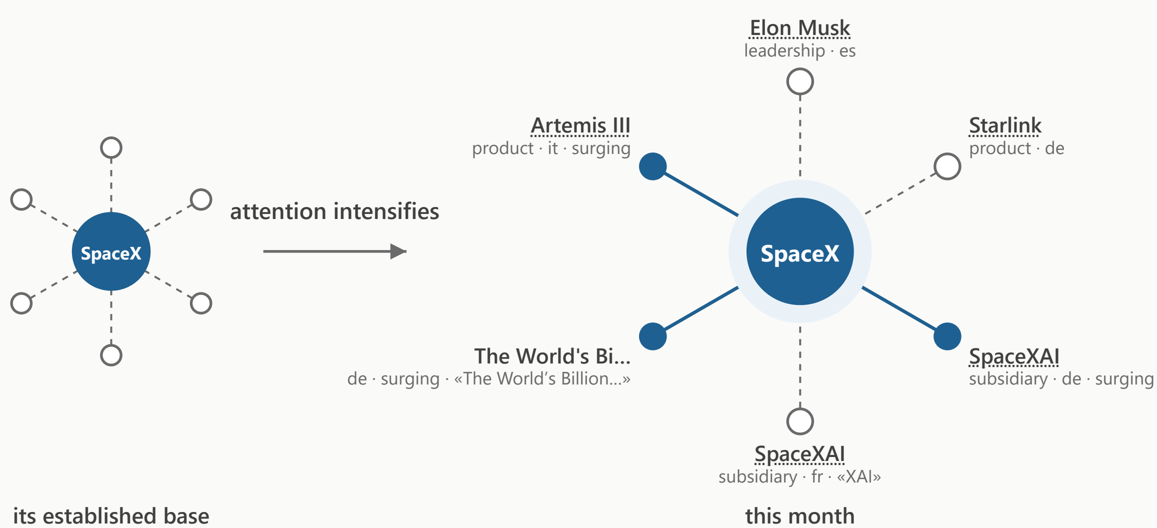
European Brand Discovery Index — June 2026

A monthly read on which consumer brands are breaking out across Europe as a whole: one signal per brand, pooled across Germany, France, Spain, Italy, Poland, and Portugal.

How to Read This — Spotlight: SpaceX

What the index measures: how broadly a brand is being discovered. A breakout means attention arriving from many distinct sources at once, not just a bigger crowd from one.

SpaceX is Europe's strongest riser. On the left, its established European sources; on the right, its attention network as it stands this month. Solid spokes are new or surging sources; dashed hollow spokes are the established base. Source names are shown in English, tagged with the market code, with the local title as audiences there see it.



The connections, stated:

- **Elon Musk** — Elon Musk founded SpaceX and holds the titles of CEO and chief engineer at the aerospace company.
- **Starlink** — Starlink is a satellite network operated by SpaceX, providing internet access globally since 2023.
- **SpaceXAI** — SpaceX acquired and integrated xAI, both founded and led by Elon Musk.
- **SpaceXAI** — SpaceX acquired xAI on February 2, 2026, absorbing it to maximize valuation for an IPO.
- **Artemis III** — SpaceX's Starship HLS is a commercially developed lunar lander for NASA's Artemis III mission.

SpaceX posts a pan-European Composite Z of +1.42 this month, its 5th straight month of broadening discovery. The new breadth is coming from SpaceXAI (subsidiary), The World's Billionaires ('The World's Billionaires'), Artemis III (product), all new or surging additions to its European attention network this month. The fresh breadth arrives against a decayed base — a step-change in how widely the brand is being discovered, whichever way the underlying story cuts. No single European peer stands out: PayPal, Tesla, and IShowSpeed co-move with it at 0.48–0.85 across 3+ years of shared history, which points to a shared audience.

Composite Z is each brand's attention-breadth momentum versus its own history: how much more, or less, broadly it's being discovered this month. Bar length scales with the magnitude (green rising, red fading).

The Lifecycle chip marks where the brand sits in its overall European attention arc, measured relative to the whole panel so a market-wide drift doesn't read as brand decline; a new stage must hold for two straight months:

Lifecycle	Meaning
discovery	Rising from a low base.
mainstreaming	Climbing toward its peak.
saturation	Near peak — little headroom left.
dormant	Low and flat — off the radar.
decay	Declining from a prior peak.

Where attention is broadening — Europe-wide

Top brands by pan-European attention signal this month (June 2026), pooled across all six markets.

Brand	Ticker	Sector	Lifecycle	Composite Z
SpaceX	—	Tech	decay	+1.42
General Motors	GM	Autos	saturation	+1.20
Google	GOOGL	Tech	mainstreaming	+0.93
Puma	PUM.DE	Footwear	saturation	+0.90
Revolut	—	Fintech	mainstreaming	+0.83
Robinhood	HOOD	Fintech	dormant	+0.66
Salomon	—	Footwear	dormant	+0.61
Ferrari	FCA	Autos	saturation	+0.58
Waymo	GOOG	Autos	dormant	+0.56
IShowSpeed	—	Influencer	decay	+0.56
New Balance	—	Footwear	mainstreaming	+0.55
Nothing	—	Tech	dormant	+0.48
Cartier	CFRUY	Luxury	dormant	+0.43
s.Oliver	—	Apparel	dormant	+0.25
Esprit	—	Apparel	mainstreaming	+0.25

Where attention is narrowing — Europe-wide

Brands decelerating fastest vs their own continental history this month.

Brand	Ticker	Sector	Lifecycle	Composite Z
Eli Lilly	LLY	Pharma	dormant	-2.30
A24	—	Entertainment	discovery	-2.36
Shein	—	Apparel	decay	-2.44
Pepco	—	Retail	dormant	-2.55
Delta Air Lines	DAL	Travel	saturation	-2.56
Electronic Arts	EA	Gaming	decay	-2.58
Yves Saint Laurent	—	Luxury	decay	-2.60
Rolex	—	Luxury	dormant	-2.64
DJI	—	Tech	dormant	-3.09
Jake Paul	—	Influencer	discovery	-3.25

Brands That Move Together

Some names' European attention moves in lockstep: when one breaks out, the other tends to follow. These are the strongest attention co-movement pairs across the pooled six-market history where at least one side appears on this sheet. Direct flow shows how much attention travels directly between the two names in the last three months. A dash means no meaningful direct flow; the co-movement then reflects a shared audience rather than a direct link. This month shows which side is broadening right now.

Pair	Co-movement	Direct flow	This month
Adidas ↔ Puma	0.87	strong	Puma leading
PayPal ↔ SpaceX	0.85	—	SpaceX leading
SpaceX ↔ Tesla	0.82	moderate	SpaceX leading
Delta Air Lines ↔ Southwest Airlines	0.73	—	both narrowing
Esprit ↔ The North Face	0.72	moderate	mixed / flat
Nike ↔ Puma	0.70	strong	Puma leading
Delta Air Lines ↔ United Airlines	0.69	—	both narrowing
General Motors ↔ Kick	0.58	—	General Motors leading

Request a sample. A continental back-data sample is available under NDA: flat file, REST API, or Snowflake share. → travis@assetflow.ai

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Coverage: 175 brands pooled across six European markets, monthly, multi-year history. Each brand is scored on its combined European footprint against its own history. This is descriptive multi-market *attention coverage*; it is not benchmarked to a European consumer survey.