

UK EDITION



What people think,
feel and do

The Most Connected Brands



**What people
think, feel
and do** _____



Who we are

Opinium is an award-winning strategic insight agency built on the belief that in a world of uncertainty and complexity, success depends on the ability to stay on the pulse of what people think, feel and do. Creative and inquisitive, we are passionate about empowering our clients to make the decisions that matter.

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Why Most Connected?

In an era of expanding customer expectations and constant competitive disruption, brands must continually find new ways to connect with consumers in order to thrive and grow. Those that do are what we call Most Connected – the brands which are indispensable to consumers' daily lives. We created The Most Connected Brands Index to help businesses and brands understand how they are connecting with consumers and provide them with ways to improve.



Foreword

Over the course of the Coronavirus health crisis we have experienced a seismic shift in the way we work, socialise, shop, relax and engage.

Brands have never had a more crucial role to play in our lives, offering guidance, hope, safety and distraction. As such, there has never been a more relevant time to measure which brands the public connect with and the nature of this connection.

Most Connected Brands (MCB) is the only study that measures the strength of these brand relationships based on the views of the public, rather than a hidden algorithm or a panel of industry experts. Consumers are,

after all, the people who can make or break a brand by forming lifelong connections or undergoing regrettable one-time experiences never to be repeated.

Opinium's Most Connected Brands study shows that what a brand represents is so much more than a logo, a product, or a service – a brand can be a lifestyle, a teacher or even a friend.

Our framework diagnoses the building blocks of successful brands, including their presence, distinctiveness, emotional connection and social traction, as well as the brand characteristics and markers which lend each brand a unique identity.

Over the last few months we have spoken to 6,000 people, collated 10,000 spontaneous brand mentions and facilitated 96,000 brand reviews to offer a robust and scientific way to unpick the intangible alchemy of brand connection.

Regardless of your sector and whether your brand has made the Top 100, we hope that in this time of great uncertainty this report will provide you with the inspiration, ideas and motivation to create, build and grow the connections that matter to you.





Covid-19

Brand marketing in a crisis: Lessons from the pandemic

No brand evaluation would be complete without taking into account the impact of Coronavirus.

The pandemic that swept the world and sent people panic buying toilet paper also sent brands panicking to self-isolate in their boardrooms or choosing to grasp the nettle.

Although difficult to predict in this case, past studies of the 2008 financial crisis have shown a clear benefit for the nettle-grabbers rather than those who remain silent. Yet we saw 81% of large advertisers deferring ads, including John Lewis, Coke-Cola, Airbnb, Unilever, Diageo, the list goes on almost indefinitely.

The question for all brands became what to possibly say at a time when public health concerns reigned supreme and restrictions and limitations to daily life were fluid.

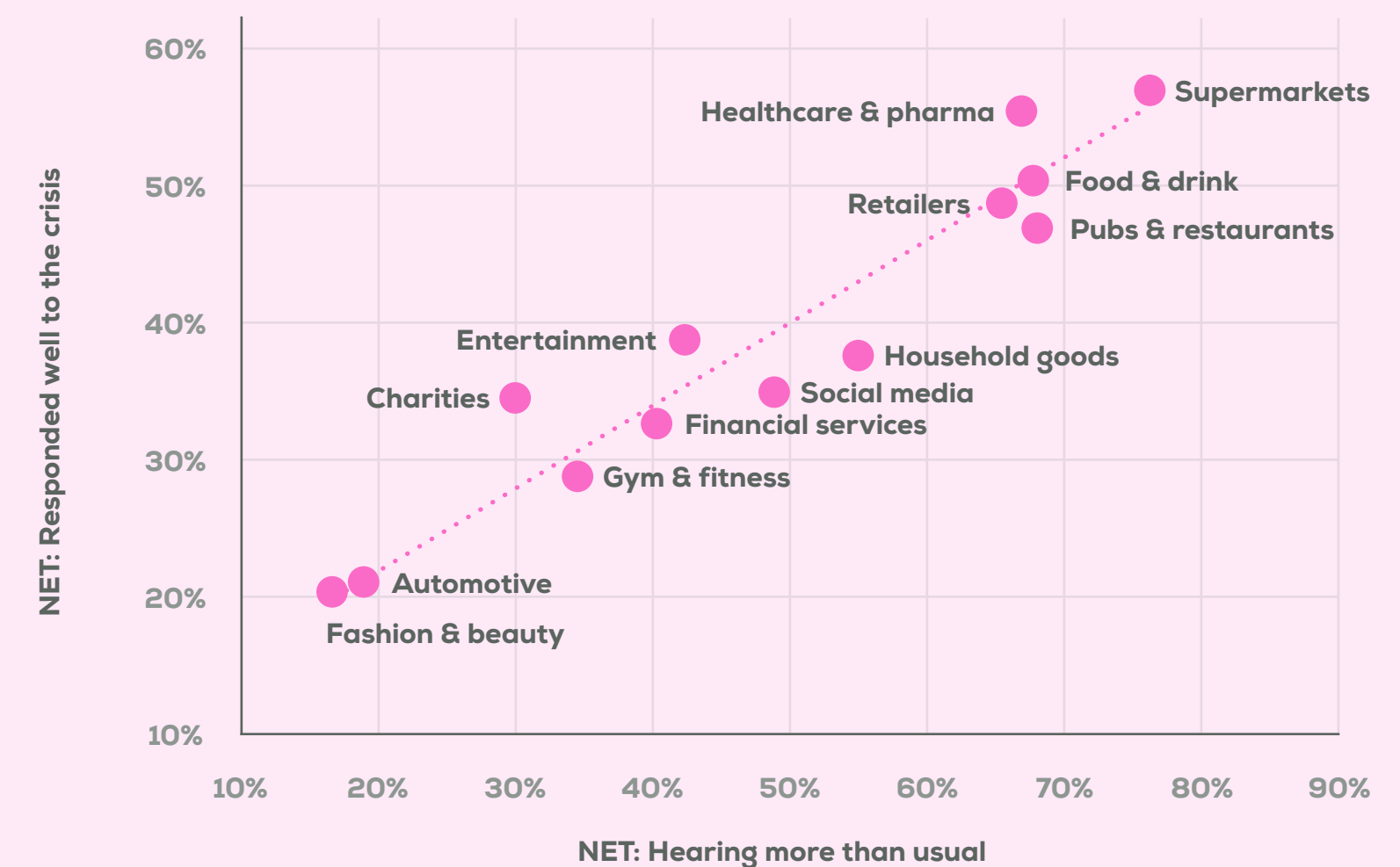
It might have appeared that you're damned if you do or damned if you don't: engage with the crisis and you risk being seen as disingenuous or continue with commercial activity and be designated tactless.

However, when you actually asked the people who make these judgements, we found that brands have a lot more space to play in than the popular tightrope analogy gives them credit for.

In fact, a very large majority of people in the UK wanted like to hear either the same amount, or even more, from brands across categories ranging from healthcare to fashion and beauty to entertainment. What's more, those that were more vocal were perceived to be handling the crisis better than those who went dark. ▶

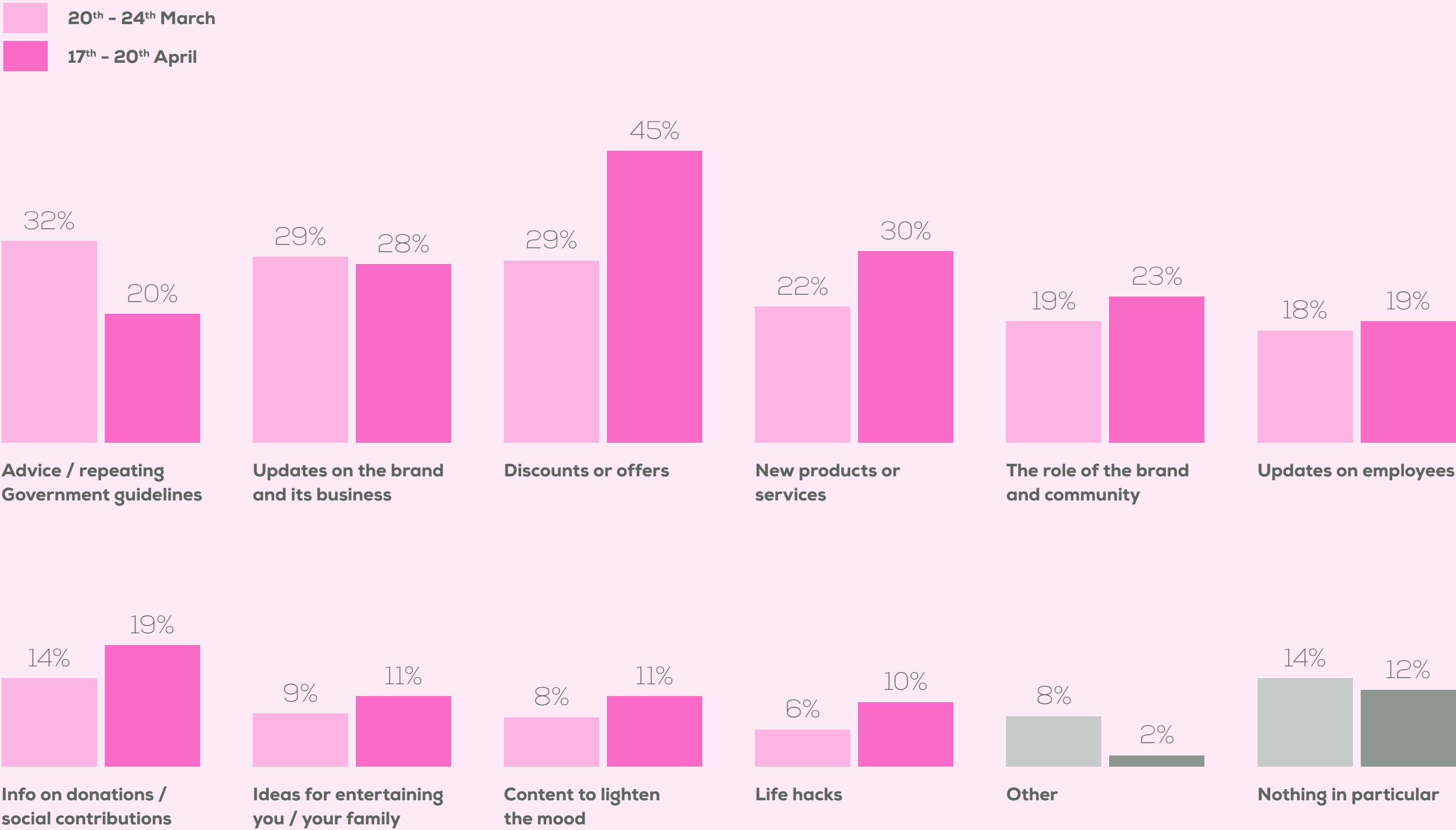
How vocal are brands and how well have they responded to the crisis?

The weekend of lockdown (20th-24th March).



Which sorts of communications would you like to hear more of?

From the week of lockdown to 4 weeks in.



The brands with the best communications at the time were those who played into their proximity to the crisis, not just their brand purpose.

Useful, truthful and genuine were the three most important pillars of successful crisis communication, however a staggering half of consumers thought that brands were ‘jumping on the bandwagon’ with their messaging. Factor in that the majority of comms was top-down and didn’t empower consumers to help (which was an over-riding desire, think Clap for Carers and the money raised by Captain Tom), and it highlights a very clear opportunity missed for many brands.

Nevertheless, consumers changed quickly under lockdown conditions, as yearning for our old way of life peaked and then declined, things other than Coronavirus began to rise in importance again and our fatigue of zoom calls became enough to stop the endless pub quizzes.

And just as quickly as attitudes and behaviours changed, so too did expectations of brands. Whilst the desire to hear from brands as much as pre-pandemic remained high, by the fourth week of lockdown, we saw both content and tone preference shift way from crisis comms, and back towards normality. By the eighth week of lockdown, across all sectors, consumers wanted the main focus of advertising to not be about Coronavirus. Reference, sure, but brands had entered a ‘goldilocks zone’ where expectations from them were much the same as pre-pandemic. ▶

Why goldilocks?

Because if Coronavirus is a rock, the coming economic downturn is the hard place. Deliberation over purchasing has already increased and we've seen people turn towards utilitarian purchasing to get their essentials and less frequently indulge in more hedonistic shopping splurges.

We've also not seen a settling of post-lockdown attitudes and predicted behaviours. Consumers are still very much in flux, which is why predicting what they will do in the future is currently still so complex.

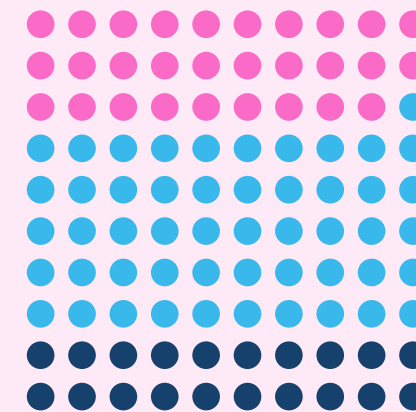
Disrupted, malleable and increasingly price conscious consumers make for a potentially unsettling future for brands, but what's certain is that building connection now is key. The results of our index will provide a window to which brands have successfully ridden through the storm, and which are best placed to face the post-Coronavirus world.

Would you like advertising to be about the current situation (e.g. lockdown, social distancing or responding to Coronavirus)?

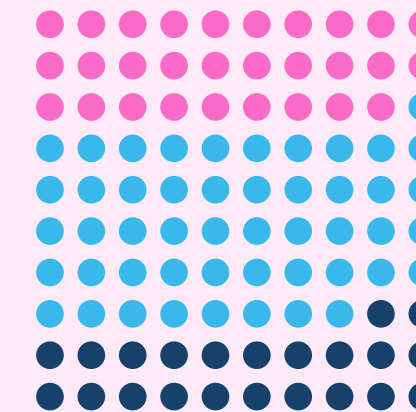
12th – 15th May (8th week of lockdown).

- Isn't related at all
- Not the main focus, but references
- Only about Coronavirus

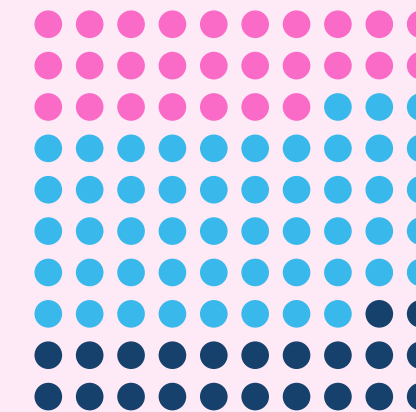
Fashion & beauty



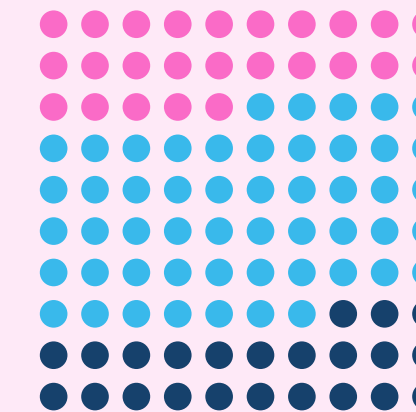
Automotive



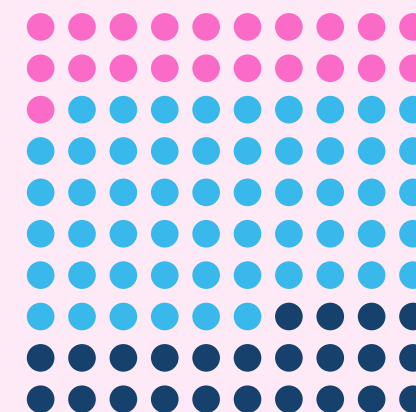
Gym & fitness



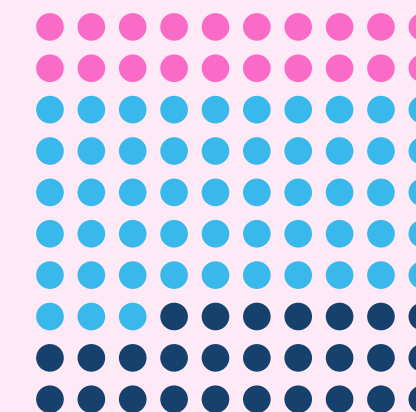
Entertainment



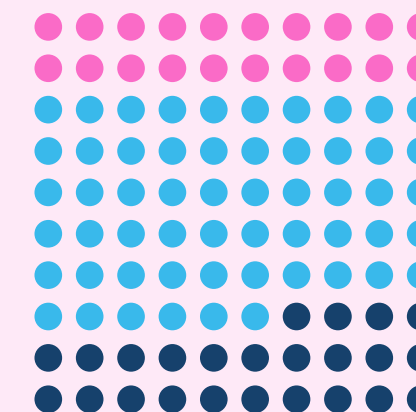
Social media



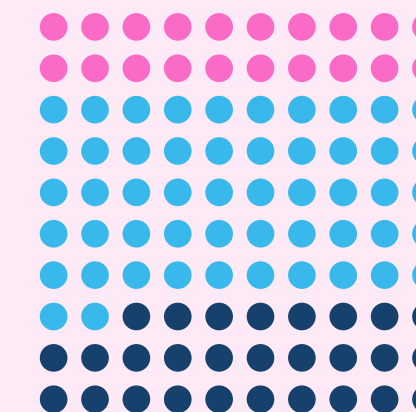
Charities



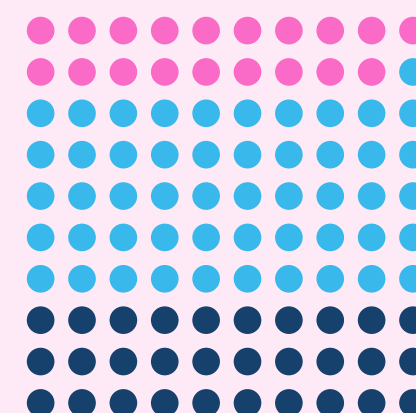
Household goods



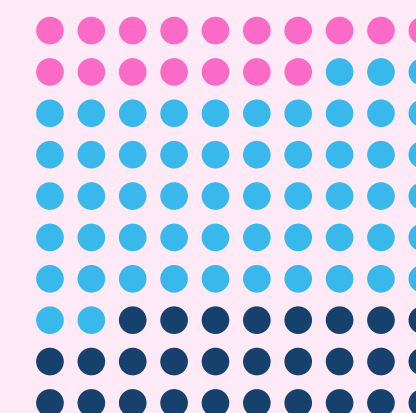
Food & drink



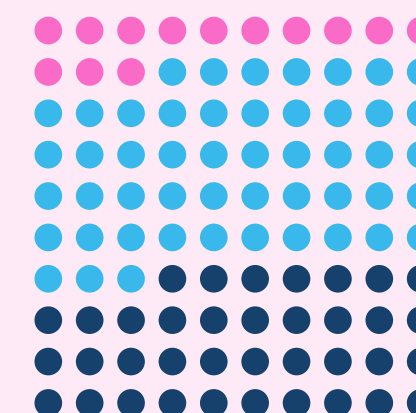
Financial services



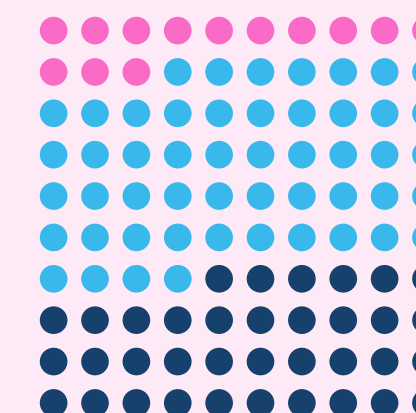
Retailers



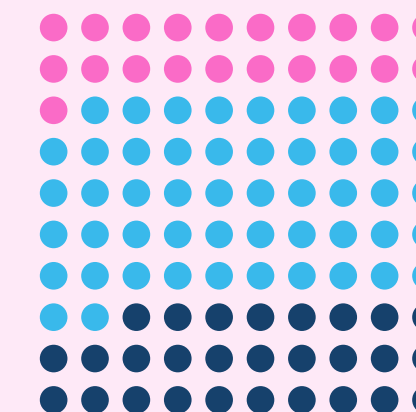
Healthcare & pharma



Supermarkets



Pubs & restaurants



Who we spoke to

6,000

Consumers

96,000

Brand reviews

10,000

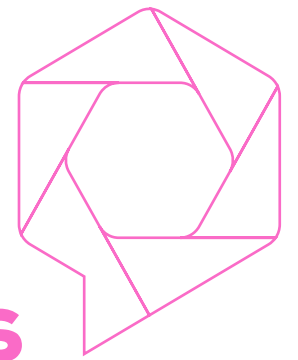
Spontaneous brand mentions

20

Expert contributors

What it means to be Most Connected

Connected brands are indispensable to consumers' daily lives. They challenge conventions, build unbreakable bonds and define how we interact. And they do this whilst remaining true to who they are.



The Most Connected Brands Index (MCB Index)

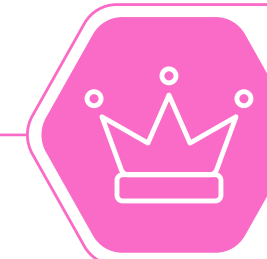
The MCB Index is the combination of four key brand metrics which are weighted together to produce a one-number summary of a brand's ability to connect with consumers.

We measure connection across four key characteristics:



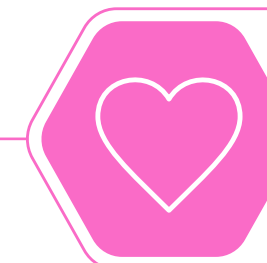
Prominence

The brand's presence and scale



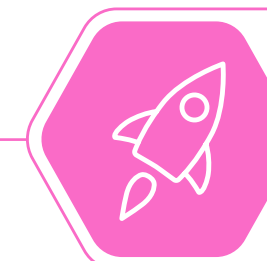
Distinction

The brand's unique identity and ability to set trends



Emotion

The brand's ability to form emotional relationships



Dynamism

The brand's momentum and social traction

The Top 100 Most Connected Brands UK



01	02	03	04	05	06	07	08	09	10	11	12	13	14	15	16	17	18	19	20
amazon	Google	Cadbury	NETFLIX	WALKERS	SAMSUNG	Apple	HEINZ	ALDI	YouTube	BBC	FAIRY	LIDL	TESCO	Kellogg's	Boots	WhatsApp	ebay	Microsoft	PayPal
21	22	23	24	25	26	27	28	29	30	31	32	33	34	35	36	37	38	39	40
LEGO	BirdsEye	M&S	Coca-Cola	Colgate	dyson	GREGGS	Argos	McVities	facebook	Sainsbury's	IKEA	Disney	SONY	Dove	McDonald's	NIKE	NIVEA	ASDA	NESCAFÉ
41	42	43	44	45	46	47	48	49	50	51	52	53	54	55	56	57	58	59	60
Morrisons	adidas	Lindt	PRIMARK	PG tips	Nestle	wilko	Iceland	sky	JOHN LEWIS & PARTNERS	BOSCH	Panasonic	B&Q	Superdrug	Tetley	Gillette	next	Co-op	COSTA	Audi
61	62	63	64	65	66	67	68	69	70	71	72	73	74	75	76	77	78	79	80
Clarks	Ford	WAITROSE & PARTNERS	b&m	wetherspoon	Nationwide	BMW	LG	BT	Waterstones	hp	pepsi	VW	KFC	JAGUAR	Debenhams	HALIFAX	TKmaxx	EE	BRITISH AIRWAYS
81	82	83	84	85	86	87	88	89	90	91	92	93	94	95	96	97	98	99	100
L'ORÉAL	Canon	Mercedes-Benz	Virgin	THE BODY SHOP	LLOYDS BANK	DELL	Levi's	NEW LOOK	NatWest	Nintendo	HONDA	TOYOTA	CHANEL	vodafone	HUAWEI	TED BAKER LONDON	deliveroo	H&M	ZARA



Movers and shakers


2019 vs 2020 Most Connected Brands UK

When we look at the very top of our Most Connected Brands Index over the last two years the top three remain consistent: Amazon, Google and Cadbury retain their spots, the other entrants of the Top 10 just shuffle positions. However, there is one noticeable newcomer, which jumps seven places versus their 2019 ranking – Netflix.

NETFLIX Netflix has continued its meteoric rise from 30th in 2018 to fourth in 2020. This is no small feat amid such illustrious company, so how has the media-services provider managed it?

A key driver has been Netflix’s growth in Prominence, which has been fuelled by their aggressive push on Above-the-Line (ATL) activity. In 2019 the brand’s media spend grew by 28% meaning that since the start of 2017, Netflix has almost tripled their ATL investment – a clear indication of their financial commitment to raising top of mind awareness amongst consumers.

For many, Netflix represents a fundamental shift in how we consume films and television. A similar shift in how we communicate can also be seen as responsible for propelling another brand up the 2020 rankings: WhatsApp.

 **WhatsApp** It’s hard to find someone not in a WhatsApp group. From kids at school, to the parents of the football team, to friendship groups and work groups,

WhatsApp has become the go-to platform for quick group communication. This has been cemented by the lockdown which has seen a wealth of intergenerational family groups spring up.

WhatsApp builds connection through Dynamism, Distinction and satisfaction. Its distinct offer is incredibly easy to use, works perfectly with the always-on way of life and facilitates the constant need for communication and sharing.

Yet even though two of the most prominent movers are technology platforms, there remains a diverse spread of brands from across other categories which have improved their connection with consumers. A case in point are two old school FMCG brands, hailing from the perhaps less fashionable categories of frozen food and household cleaning.


FAIRY Fairy is a brand that has been with us for decades and that is very much at the heart of how the brand has built a strong emotional bond with consumers. Rating sixth for Emotional connection, the public have complete faith that the product won’t let them down, making Fairy one of the top brands we can’t live without.

In recent times, Fairy has also addressed sustainability clearly and with transparency. Tapping into the modern mind set of social responsibility, CSR is now a clear strength for the brand. That modern mind set has also led the brand to a partnership with LGBTQ charity the Albert

Kennedy Trust, and actor and singer Duncan James to help provide accommodation for homeless members of this community.

 With the quest for health eating and scratch cooking rather flying in the face of frozen food, it may be a surprise to see Birds Eye also improving its position in the ranking. Trading in similar territory to Fairy, Birds Eye is renowned for having products that deliver and being that dependable family favourite that we have all grown up with. However, heritage does not guarantee connection, and Birds Eye have successfully remained relevant to consumers through activity such as ‘Eat in full colour’ promoting steam fresh frozen veg and ‘So what’s for tea’ which provides help, support, and inspiration for the brand’s heartland of busy families.

But, as some brands rise up the rankings, others inevitably have to fall.

 One of the most noticeable trends this year takes place outside of the top 50. Ford, BMW, Volkswagen, Toyota and Mercedes-Benz have all witnessed sizeable drops in their ranking. As our data is drawn from before the Coronavirus crisis, this does not bode well for a sector which has been particularly hard hit during the lockdown period. The drop in connection for consumers may also be explained by the fall in car registrations and a shift in consumer attitude to more environmentally friendly ways of transport.





Greggs, the highest new entrant on the MCB Index, rockets in at number 27. Propelled by what is now considered to be a masterclass in culturally relevant marketing, the largest bakery chain in the UK ranks sixth for Dynamism, ahead of brands such as Samsung, Apple and YouTube. From sending vegan sausage rolls in mock iPhone packaging to journalists to provoking Good Morning Britain TV presenter Piers Morgan to tweet “Nobody was waiting for a vegan bloody sausage, you PC-ravaged clowns” to masquerading as Gregory & Gregory and successfully convincing consumers that its Oriental Chicken Sticky Rice Salad was haute cuisine; Gregg’s tongue-in-cheek marketing has vastly outstripped any potential media spend. Whilst fast food rivals McDonald’s (37th) and KFC (74th) have also both moved up the rankings, Greggs has shown that strong brands can just as quickly be built with clever ideas and excellent execution.



The Wetherspoons brand is no stranger to controversy. Whilst founder Tim Martin alienated and enraptured consumers in equal measure for his pro-Brexit stance, Wetherspoons enters the Most Connected Brand Index in 65th place. Scoring relatively consistently across all four-key metrics, Wetherspoons ranks 43rd in terms of Distinction suggesting that you don’t have to please everyone all of the time in order to succeed. The backlash against Martin’s comments during the coronavirus pandemic that “virus doesn’t spread in pubs” in a bid to keep them open during lockdown has, however, been significant. The launch and growing popularity of apps such ‘Neverspoons’ - created to showcase independent pubs located in the vicinity of Wetherspoons, suggests that in the future the brand may therefore need to find a way to balance controversy with connection in order to not simply survive, but grow.



- ↑ Up from previous year
- ↓ Down from previous year
- = Same as previous year
- ★ New

2018

- 1 AMAZON
- 2 GOOGLE
- 3 HEINZ
- 4 BBC
- 5 APPLE
- 6 YOUTUBE
- 7 SAMSUNG
- 8 CADBURY
- 9 EBAY
- 10 MICROSOFT
- 11 COCA-COLA
- 12 PAYPAL
- 13 TESCO
- 14 WALKERS
- 15 KELLOGG’S
- 16 ARGOS
- 17 DYSON
- 18 LIDL
- 19 MARKS & SPENCER
- 20 COLGATE
- 21 ALDI
- 22 FAIRY
- 23 BOOTS
- 24 SAINSBURY’S
- 25 FACEBOOK
- 26 SONY
- 27 MCVITIE’S
- 28 DOVE
- 29 MCDONALD’S
- 30 NETFLIX
- 31 BIRDSEYE
- 32 MORRISONS
- 33 NIVEA
- 34 WHATSAPP
- 35 ADIDAS
- 36 IKEA
- 37 MASTERCARD
- 38 DISNEY
- 39 NESTLÉ
- 40 ASDA
- 41 ICELAND
- 42 GILLETTE

2019

- = 1 AMAZON
- = 2 GOOGLE
- ↑ 3 CADBURY
- ↑ 4 SAMSUNG
- ↑ 5 EBAY
- ↓ 6 HEINZ
- ↑ 7 WALKERS
- ↓ 8 YOUTUBE
- ↑ 9 ALDI
- = 10 MICROSOFT
- ↑ 11 NETFLIX
- ★ 12 LEGO
- ↑ 13 COLGATE
- ↓ 14 APPLE
- ↓ 15 TESCO
- ↑ 16 BOOTS
- ↓ 17 COCA-COLA
- = 18 LIDL
- ↓ 19 BBC
- ↓ 20 MARKS & SPENCER
- ↑ 21 SONY
- ↓ 22 ARGOS
- ↓ 23 PAYPAL
- ↓ 24 KELLOGG’S
- ↑ 25 FACEBOOK
- ↓ 26 SAINSBURY’S
- ↑ 27 ASDA
- ↓ 28 FAIRY
- ↑ 29 DISNEY
- ↓ 30 DOVE
- ↓ 31 DYSON
- ↑ 32 SKY
- ↓ 33 MCVITIE’S
- ↑ 34 NESCAFÉ
- ↓ 35 NIVEA
- = 36 IKEA
- ↓ 37 MORRISONS
- ↓ 38 BIRDSEYE
- ↓ 39 WHATSAPP
- ↓ 40 ADIDAS
- ↓ 41 MCDONALDS
- ↓ 42 NIKE

2020

- = 1 AMAZON
- = 2 GOOGLE
- = 3 CADBURY
- ↑ 4 NETFLIX
- ↑ 5 WALKERS
- ↓ 6 SAMSUNG
- ↑ 7 APPLE
- ↓ 8 HEINZ
- = 9 ALDI
- ↓ 10 YOUTUBE
- ↑ 11 BBC
- ↑ 12 FAIRY
- ↑ 13 LIDL
- ↑ 14 TESCO
- ↑ 15 KELLOGG’S
- = 16 BOOTS
- ↑ 17 WHATSAPP
- ↓ 18 EBAY
- ↓ 19 MICROSOFT
- ↑ 20 PAYPAL
- ↓ 21 LEGO
- ↑ 22 BIRDSEYE
- ↓ 23 MARKS & SPENCER
- ↓ 24 COCA-COLA
- ↓ 25 COLGATE
- ↑ 26 DYSON
- ★ 27 GREGGS
- ↓ 28 ARGOS
- ↑ 29 MCVITIE’S
- ↓ 30 FACEBOOK
- ↓ 31 SAINSBURYS
- ↑ 32 IKEA
- ↓ 33 DISNEY
- ↓ 34 SONY
- ↓ 35 DOVE
- ↑ 36 MCDONALD’S
- ↑ 37 NIKE
- ↓ 38 NIVEA
- ↓ 39 ASDA
- ↓ 40 NESCAFÉ
- ↓ 41 MORRISONS
- ↓ 42 ADIDAS

Top scores by key measures

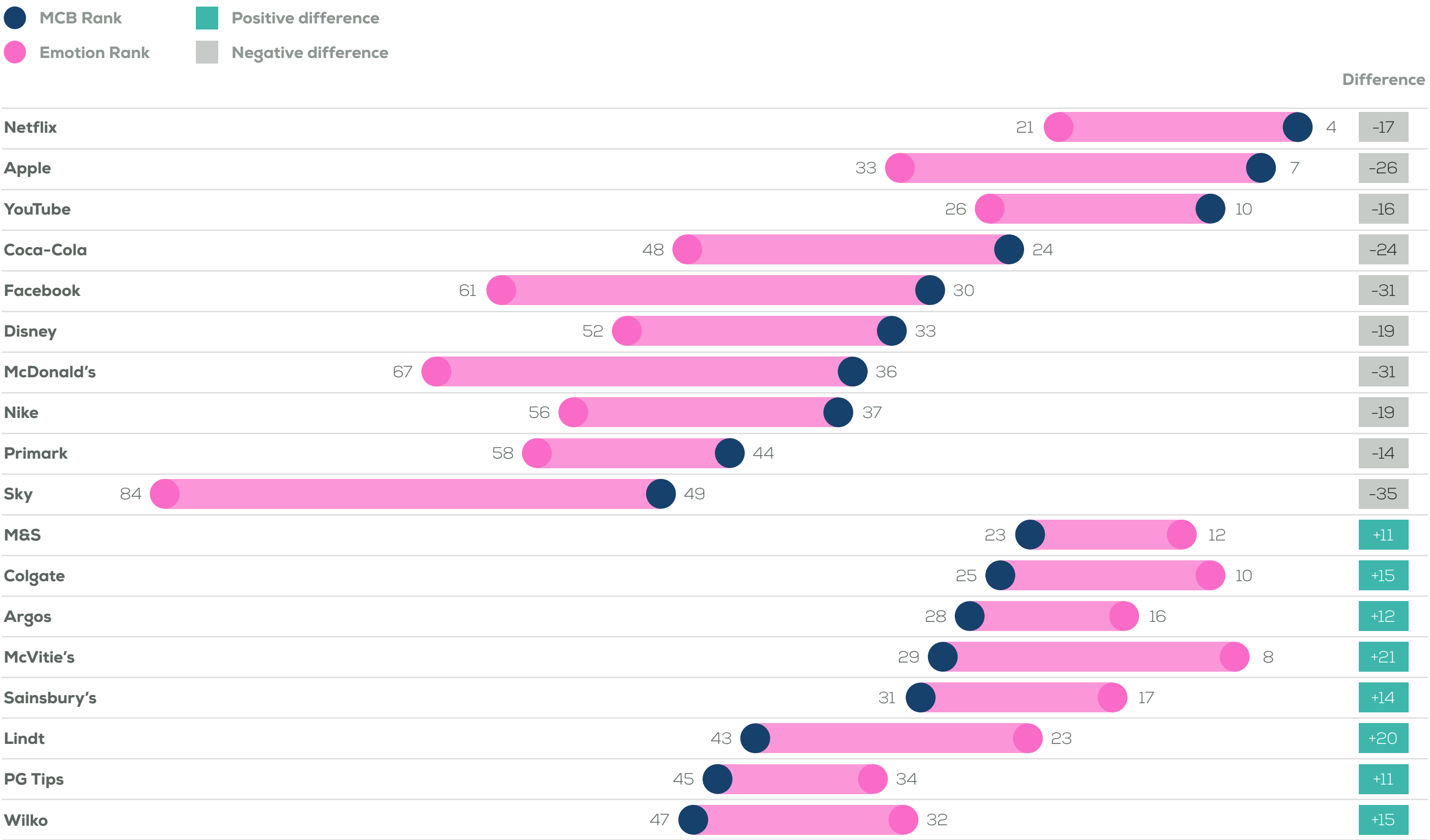
Mixed emotions: forging deep and lasting connections with the public

Brand connection, whilst an over-used marketing term, has never been more important. At the time of writing we, as a nation, are in a state of lockdown: scared, uncertain and bored. Looking for brands to offer hope, advice or even just a distraction.

Our Most Connected Brands study offers some clear characteristics for brands that successfully form lasting relationships based on reciprocal emotion and those that don't.

There are five clear trends when observing which brands engage and which exasperate:

- 1 Brands entrenched in UK culture have the strongest hold on us
- 2 Brands that sell physical products are far more likely to connect with us than those purely in the online-virtual world
- 3 Brands that connect tend to deliver hope, happiness or a sense of belonging
- 4 People might love your content, but that doesn't mean they love you
- 5 CSR isn't something you can buy or badge, it needs to be core to a brand's DNA to matter



1

Brands entrenched in UK culture have the strongest hold on us

A striking characteristic of the brands that we most connect with is that they are ingrained in UK culture. Interestingly, highly connected brands such as Colgate show this isn't due to a 'Buy British' philosophy, but because we have grown up with these brands. Similarly, the challenge facing the multi-national brands is how you can form intimate, personal and authentic relationships on a global scale.





2

Brands that sell physical products are far more likely to connect with us than those purely in the online-virtual world

Something questioned in our previous MCB studies, was what the intangible nature the term 'brand' actually represents. For the young, it is more likely to be the app on their phone or the logo that streams before their favourite programme plays, whereas for older people it will be the store they buy from, or the product they put in the cupboard. The nature of brand also plays a role in our emotional connection. We are far more likely to engage with the chocolate chocolate we buy from Lindt or biscuits from McVitie's, than the social media site or internet browser we use.

3

Brands that connect tend to deliver hope, happiness or a sense of belonging

What is striking when looking at the data is just how emotional people are about brands. For the leading brands, our relationships are very rarely ambivalent, but are based on instinctive and deeply held emotional markers. For the three most emotionally distant brands in our list (Sky, Facebook and McDonald's) the kneejerk emotions are anger and disgust. For the three most emotionally connected brands (McVitie's, Lindt and Wilko) the overriding emotions are that of amusement, happiness and love.





4

People might love your content but that doesn't mean they love you

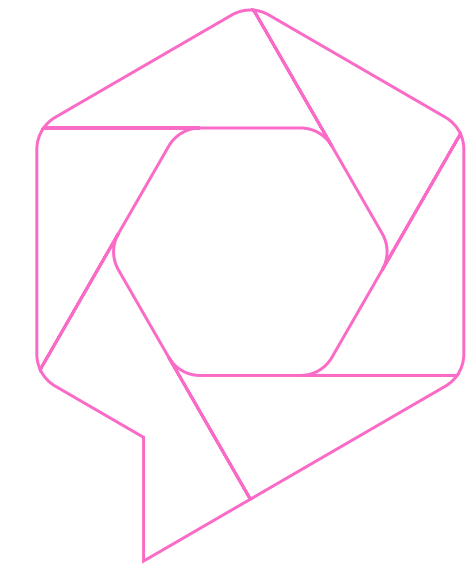
An interesting finding is that brands whose core purpose is to entertain and evoke emotion have the largest emotional disconnect with the public. Netflix, YouTube and even Disney, underperform on their ability to connect with consumers. This suggests that the emotion invested in their content isn't necessarily reflected onto the brands themselves. Sky is the worst culprit due, in part, to keeping content hidden behind a monthly subscription paywall and their decision to pay £1,193 million per annum to acquire Premier League rights to ensure the public would hold their nose and continue subscribing.

5

CSR isn't something you can buy or badge, it needs to be core to a brand's DNA to matter

The final trend lies in the importance of corporate reputation. All of the brands that struggle to connect have reputational baggage that weighs them down. For Primark, it lies in fast fashion and sustainability; for Facebook, fake news and hidden influencers; and for McDonald's, increased focus on healthy living.





All of the characteristics teach us something, that to successfully connect with consumers brands need to:

- 1 Develop an authentic persona based on their core purpose, not try to manufacture one
- 2 Create intimate and personalised brand interactions
- 3 Ensure they are clear not just about what products and services they offer but also about which emotion they are tasked with delivering
- 4 Recognise that just because you deliver emotion, doesn't mean you are banking it
- 5 Recognise how you behave and how you treat employees, the environment and customers won't just affect your brand today but will become a lasting part of your brand DNA



The Top 15 Most Connected Brands UK



KELLOGG'S

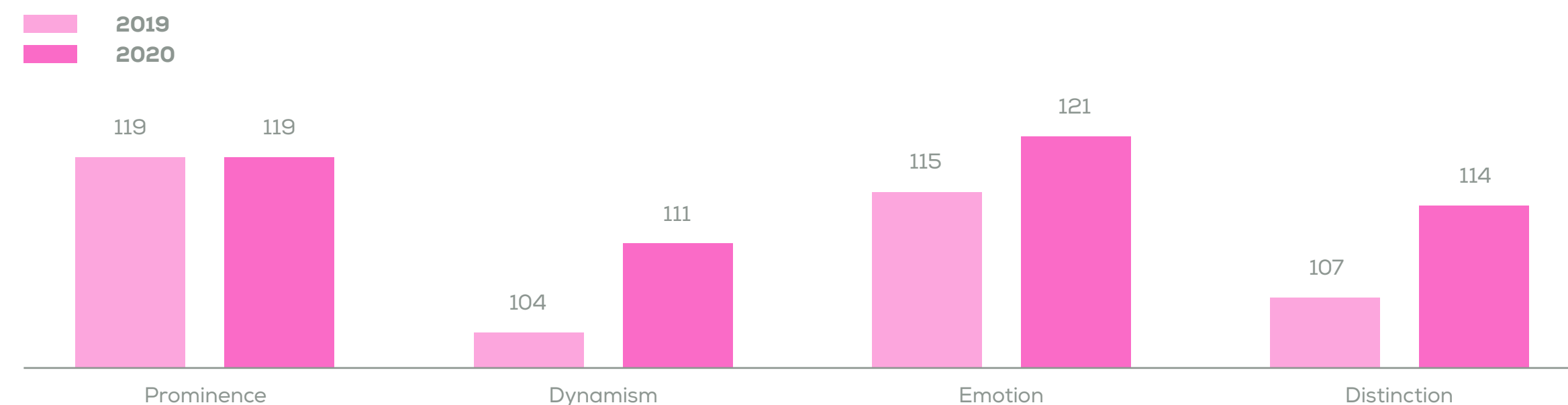
The champion of breakfast

The kings of breakfast time, who families all over the country wake up to every day have smashed into the Top 20. Kellogg's has risen 9 places from our 2019 ranking to 15th in 2020.

The strength of the Kellogg's brand is the consistent mass appeal, the brand features in the top 20 across nearly all of our diagnostic metrics. The key strength is of course the emotional connection that the brand has with consumers and is similar to other heritage FMCG brands such as Cadbury,

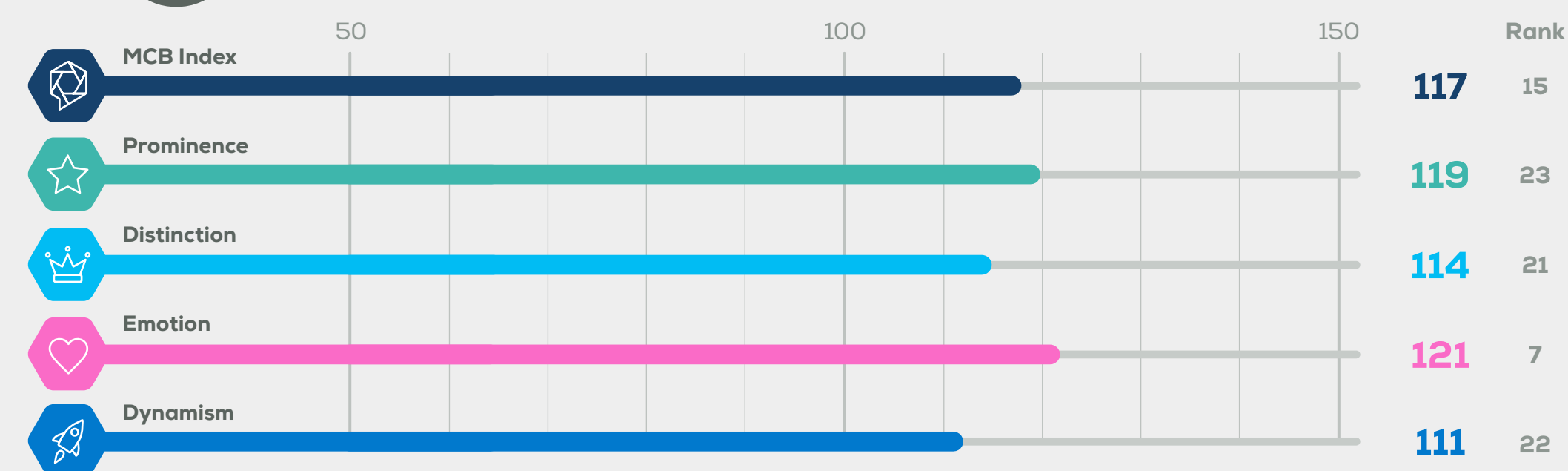
Heinz and Walkers, with Kellogg's ranking seventh overall on that measure. The brand evokes a strong emotional reaction stirring positive emotions such as happiness, love, belonging and comfort.

The strengthening of Kellogg's consumer connection has been successfully achieved by a very commendable improvement across 3 of the 4 key pillars of the Connected Brands Framework.



2019
↑ 24th

The Most Connected Brands 2020



15th KELLOGG'S



This achievement is even more admirable when there has been reduction in advertising spend from 2018 to 2019 behind core Kellogg's cereal brands.

Kellogg's have worked their portfolio moving focus of activity from Corn flakes in 2018 to Crunchy Nut in 2019. Backed by a continuation of the cheeky "They taste too good" campaign featuring executions specifically targeting the next generation of cereal buyers, such as the dating app breakfast themed ad. Alongside family favourites such as Rice Krispies, the largest share of spend is still given to Special K as the brand continues to ensure it offers something for everyone.

The mass appeal of the brand shines through in terms of the high rating received for being an iconic brand, meeting consumer needs as well as being a brand that consumers can't live without.

As the Kellogg's range expands to offer more and more healthier options the brand has also focussed of operating ethically and this has not gone unnoticed by consumers as Kellogg's is rated 19th overall in terms of putting people

before profits. The organisation has a number of initiatives focussing on both people and the planet, such as educating on the nourishment in food, helping to feed those in need and nurturing the planet through responsibly sourced ingredients, reducing packaging and food waste.

Kellogg's has also been named to the FTSE4Good Sustainability index. This highly regarded barometer evaluates on a number of environmental, social and governance factors and serve as independent validation of the organisations corporate responsibility effort. Kellogg's have also been named to Ethisphere's annual list of World's Most Ethical Companies and Forbes' list of the world's most reputable companies.

Food production and the impact on planet will continue to become more important across the globe. Kellogg's have certainly taken this to its core and through innovation and staying close to consumer consumption trends the brand that first entered the UK in 1922 remains a family favourite and a staple on most breakfast tables in 2020.



Still a UK love story

In 1919, Jack Cohen returned from war and began selling surplus groceries from a stall in the East End of London. From day one, Jack believed in putting affordable food in the reach of everybody and a few years later in 1924, the name 'Tesco' was born. From 1919 to 2020, Tesco has been feeding the nation and proved that it really is a 'brand we can't live without'.

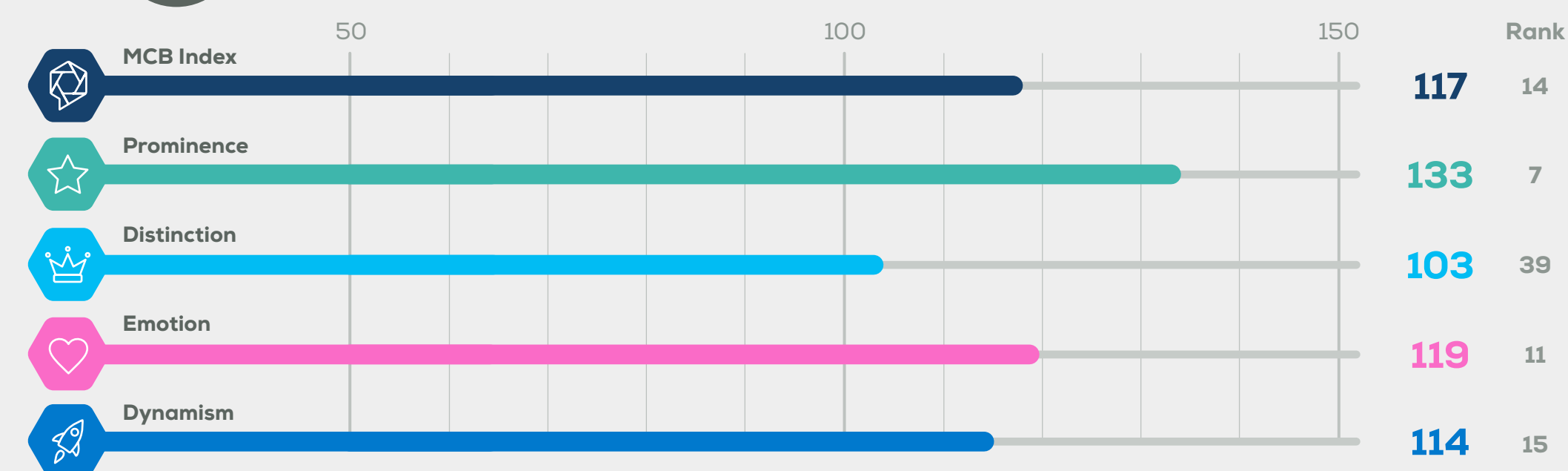
Tesco sits at 14th in the Most Connected Brands ranking for 2020, one place ahead of 2019 and is a brand that doesn't struggle to achieve prominence (coming seventh) or familiarity with consumers due to their massive store estate. However, whilst in the top five UK brands, Tesco still lags behind its supermarket competitors Aldi and Lidl and struggles again to make it to the top spot for supermarkets.

Within our Emotion and Dynamism metrics Tesco has done increasingly well since 2019, and though not making it into the Top 10 in either, it has increased its score in both by 12 and nine places respectively which is a huge feat. Looking more closely at their advertising campaigns in 2019, Tesco did especially well with its momentum, social interaction and emotional connection. Last year Tesco celebrated its 100th anniversary and increased its traditional advertising spend from £74.8 million to more than £80.8 million (remaining the biggest advertising spender in the UK grocery market in 2019). This milestone has likely been the main contributor for the increased spend from the retailer across trusted media channels.

Their 2019 Christmas campaign could be a contributor of this as it celebrates Tesco's centenary year by showing a time-travelling delivery van and its driver, who journey through the decades. The ad takes inspiration from the film Back to the Future and definitely struck an emotional chord.



The Most Connected Brands 2020



14th TESCO

Tesco's more real-life approach with their "food love stories" campaign, which has been running for the last couple of years, has been a hit – including their most recent one during the Coronavirus lockdown. Showing normal looking people cooking and communicating through videos under lockdown, it highlights food as a symbol and means of connection. This perhaps explains why it has been such a profound campaign.

Despite Tesco's improvement within Dynamism, Tesco falls behind both Aldi and Lidl on Distinction and Dynamism. These are two key metrics that we find challenger brands and innovators excel on, with brand Dynamism in particular a harbinger of future success. The fact that Tesco is close to average particularly on Distinction and the ability to set trends indicates a brand which could be stalling.

Saying that, consumers seem happy with the work Tesco has done to improve wider society, with the brand being rated in our Top 10 for social responsibility. Clearly the work the company has done around using certified sustainable sources across the massive range of products it offers is not going unnoticed. Furthermore, the Community Food Connection scheme, in partnership with food redistribution charity FareShare, provides free, surplus food every day to local charities and communities. The scheme is the biggest supermarket food redistribution scheme in the UK and shows what good a big brand can do.



Brand expert view

TESCO

Next year, Tesco will celebrate 25 years as the top dog in UK retail. With size comes power. And with power comes opportunity.

By any standard, Tesco has had a good crisis. Sales soared when eating-in became the only option. Store layouts were quickly adapted to social distancing. Recognition built that Tesco staff were putting themselves in harm's way to deliver a vital service for their communities. Their "Keeping you safe" pledge felt like a real commitment not empty rhetoric, extending as it did to support for victims of domestic abuse. No surprise that The Motley Fool suggested in June that Tesco shares were a better bet than a cash ISA.

In addition to being well organised and thoroughly competent, Tesco has regrouped and rebounded as a brand because it knows the difference between presence and connectivity. Presence is a physical attribute; connectivity is an emotional feeling.

Food – the heart of Tesco's offer – is a powerful symbol of connectivity. Cooking and eating are social acts and family rituals: they literally and figuratively bring people together.

Which is perhaps why Tesco's Food Love Stories has been such a resonant campaign, showcasing authentic people we can relate to.

Moreover, Tesco hasn't been shy about the contributions it has been making to food banks, through the Community Food Connection. It has leveraged its power, and channelled the generosity of its customers, to step up and help to mitigate governmental policy failure.

As a result, plenty of us feel that Tesco is there for us, and for all of us. Providing the basics and helping us to find the balancing point between cost and quality.

Better managing that balance, by breaking the link between cheap food and bad food, strikes me as being the big opportunity for the brand to connect even more deeply with its communities, and to help to connect those communities

The Covid crisis has underscored and amplified the gap between the have-lots and have-nots. This polarisation is nowhere more evidenced than by people's diets and consequent health.

Tesco could use its phenomenal purchasing power, customer data, and strong voice as a market leader to effect a real improvement in the nation's wellbeing. They can do this by helping people make better choices (e.g. not bombarding them with cheap chocolate); and by supporting local and high-quality producers with fair pricing and fair access.

It took generations for Tesco to escape its 'Slasher Jack' origins as a price-fighter. But mindful of the pressure from Aldi and Lidl and recognising the very real constraints its customers are experiencing, it feels the need right now to offer price-matching.

I sincerely hope that the brand does not retreat towards the value end of the balance and pass up its chance to improve quality. Why should they? Because they sincerely give a damn about their stakeholders, and they have the power to make a difference. Valorising good value and good food is the way to show concern, respect and affection for customers, suppliers, colleagues and the community at large – improving wellbeing and healing divisions. As Huey, Frankie and Jennifer all sang. "That's the power of love".

Alec Rattray
Consultant



Lidl gets larger

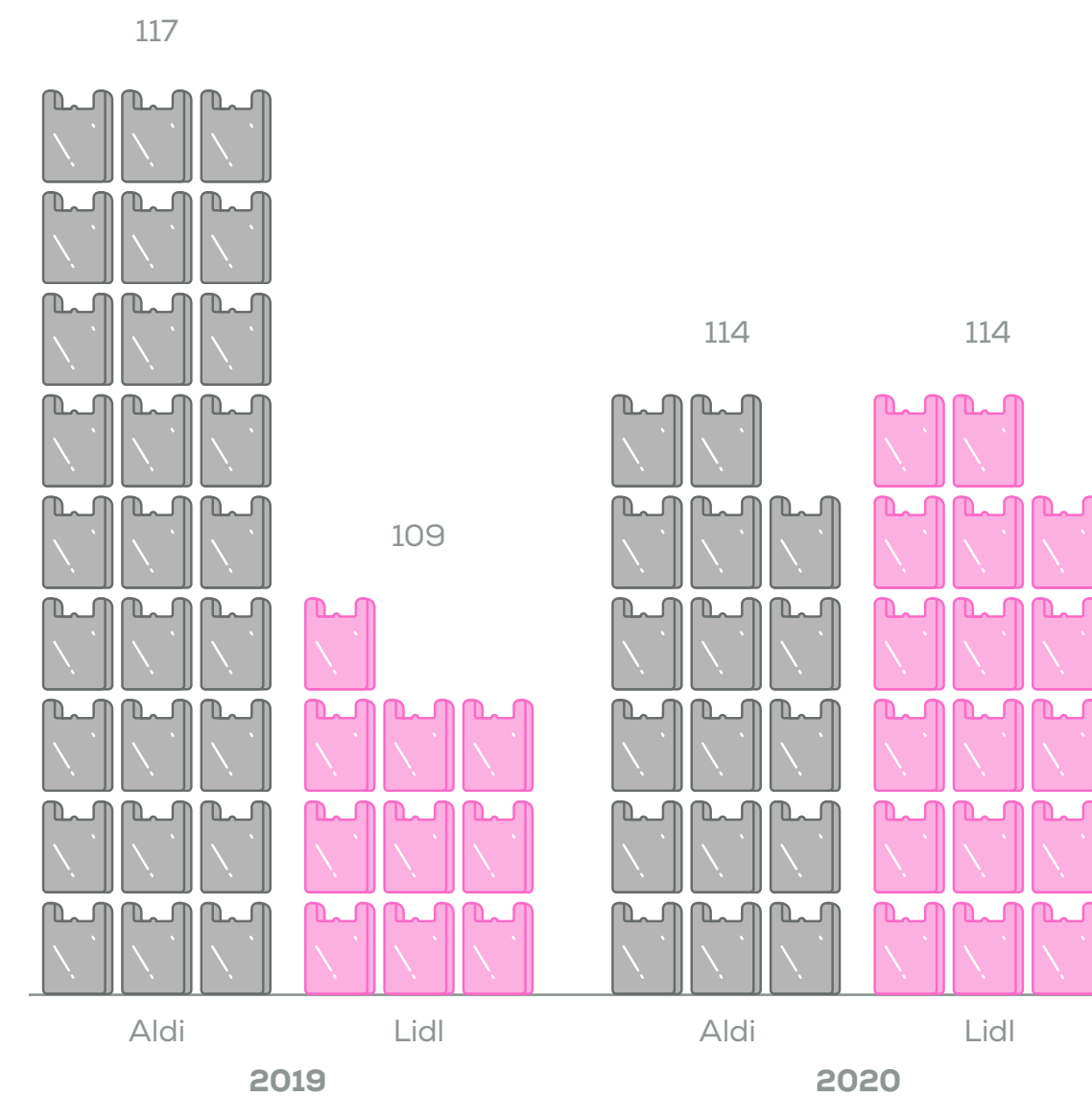
It has been another very good year for Lidl.

In March, the supermarket was named the UK's fastest growing grocer with reported sales increasing by 11.4% in the first quarter after a record-breaking Christmas season. The opening of its 800th store in the UK earlier this year after an ambitious expansion period saw the supermarket chain climb five places in our Most Connected Brands Index to 13th and overtake rival Tesco for the first time. In 2020, Lidl has increased its popularity and scored above the supermarket average for each brand measure.

But we can't talk about one without the other and by that we mean, Aldi.

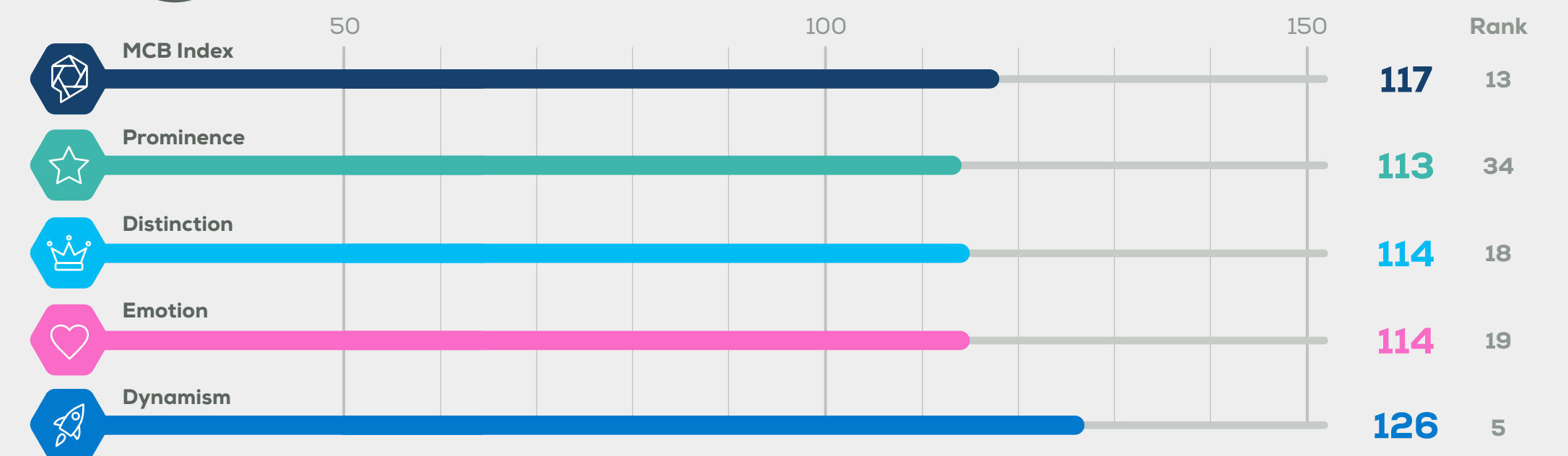
Aldi remains Lidl's strongest competitor in the category having retained the highest placing for a supermarket in the MCB Index at number nine. Whilst Aldi performs well across all four brand key metrics, Lidl has improved its Emotion rating on last year, whereas Aldi has suffered a slight decline.

Emotion Index



2019
↑ 18th

The Most Connected Brands 2020



13th LIDL

Emotional connection with Lidl has been driven by consumers' strong endorsement of associations such as having 'values and ideals that I can relate to', 'representing someone like me' and 'knowing what's important to me'.

Price is also, of course, a big factor in supermarket choice, hence the overall performance of the discounters in the MCB Index. It is therefore no surprise that Lidl scores highly for 'value for money' and offering 'great promotional offers'.

In terms of demographic differences in consumer perceptions of the brand, there has been a significant improvement in perceptions of Lidl amongst younger consumers, climbing 14 places on last year's result in the 18-34-year-old age group rankings. However, the key audience for Lidl continue to be 35-54 year-olds who alone place Lidl as the top performing supermarket in the MCB Index. This age group give the brand the highest endorsement for Popularity, Buzz, Value for Money and second highest score in social responsibility behind the Co-op.

However, it's common knowledge that Coronavirus has had a drastic impact on supermarket sentiment and so what has this meant for Lidl?

After re-interviewing consumers to understand the impact the pandemic has had on the UK's Most Connected Brands, there have been a number of shifts in supermarket placing. Unfortunately for Lidl there has been a fall in overall ranking, dropping 11 places with scores for measures such as 'giving me what I need' and 'social responsibility' seeing the greatest decline.

Whilst key competitor Aldi has also fallen down the rankings, Sainsbury's, Tesco, Morrisons, Iceland and Co-op have all gained on their former positions. Although the current situation we find ourselves in isn't permanent, possible long-term effects of recent experiences mean the same can't be said for consumer behaviour. Consumer expectations now extend further than resonating with brand values and discounted prices. Lidl will need to adapt quickly and rebuild its strategy to account for new customer demands in order to retake the footfall it may have lost to 'traditional' and local supermarkets over the course of the pandemic.



Brand expert view

LIDL

Last year Lidl celebrated 25 years of trading in the UK; it has now grown to over 760 stores. Along with fellow continental interloper Aldi, Lidl has steadily chipped away at the 'big four' – Tesco, Sainsbury, ASDA and Morrison's – commanding nearly six percent of the grocery market. And unlike any of the 'big four' store brands, Lidl's market share has grown consistently over the past ten years, adding over 600,000 new shoppers in the last year alone.

Lidl's early success was down to keen pricing, but last year the firm added another string to its bow – quality. The store brand trumpeted a clear product quality claim 'Big on quality; Lidl on price', supported by a £70 million integrated communications campaign. Marketing Director Claire Farrant said at the launch: 'we want to make it really clear we are big on quality'. The claim is supported by visible accreditations from the RSPCA and Red Tractor, together with a Retail Industry Award winner's badge for fresh produce quality. The success of the repositioning is

the key to Lidl's high Most Connected Brands ranking – a recent Which? retail survey (May 2020) found that 'quality of fresh products' is one of the most important factors for consumers when choosing where to shop.

The same Which? survey ranked Lidl fourth in customer satisfaction amongst supermarkets – one of only two brands to score a maximum of five out of five for value for money (value for money expressed as high quality and low prices). So, the store is delivering on its stated promise – always a good way of winning and keeping customers!

The brand has found other ways to connect with British consumers; stores and promotions sport a liberal use of Union flags to signal domestic produce (two thirds of Lidl's products are sourced from British suppliers – which may be helpful as Brexit impacts). And the pun in the strapline of Lidl as meaning 'little' gives the name an Anglo-Saxon feel.

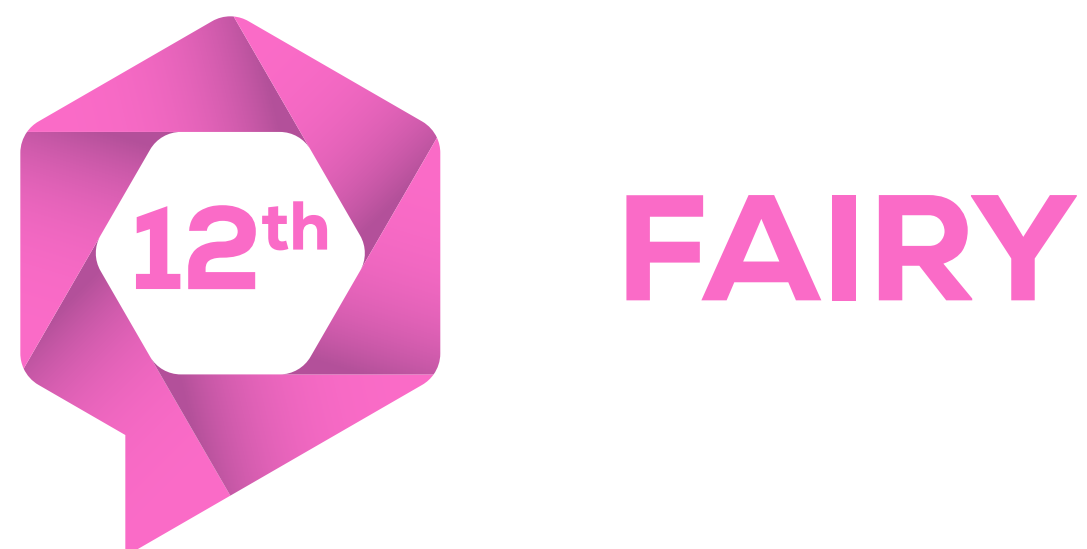
So, what about the future? Missing from Lidl's brand armoury is an online proposition. Consumers were slowly migrating to

online grocery sales pre-Covid-19, but unsurprisingly since the pandemic grocery deliveries have increased dramatically, rising to 10% of the total sales this April – and they are forecast to grow faster. Most of Lidl's competitors have online offerings and recently comparator Aldi teamed up with Deliveroo. Rumours persist that it is tough to make profits from online groceries – but missing out gives share to competitors. Watch this space for Lidl's response.

Secondly, whilst Lidl scores highly on value, the shopper experience is poor with long queues, scarce staff availability and average-at-best store appearance. Can Lidl address these weaknesses without needing to increase prices?

And finally, the company is operating in one of the most competitive sectors – a market which sports wafer-thin margins. How does it continue to differentiate from the competition – and replicate last year's successful 'Big on quality; Lidl on price' initiative?

Adrian Day
Consultant, Adrian Day Advisors



A sparkling performance

Fairy remains an iconic brand with an ever-increasing stronghold in people's hearts, thanks to its sentimental ties and consistent product offering.

The brand has been featuring in people's homes for over 60 years, during which it has successfully developed (and maintained) a strong emotional connection with consumers. Our metrics show that Fairy is strongly associated with 'comfort', 'belonging' and 'security' – and that performance across all three of these measures is higher than it was in the previous year.

Fairy has leveraged the 'original washing up liquid' branding brilliantly over the years, with archetypal advertising showing children impatiently waiting for the trademark washing up bottle – a design which was in circulation up until 2000 – to create their next DIY toy.

For its 50th anniversary in 2010, Fairy didn't hold back on the nostalgia. It celebrated by releasing a limited run of bottles with that classic design and brought back Nanette Newman who appeared in the 1980s TV ad in a promotional campaign.

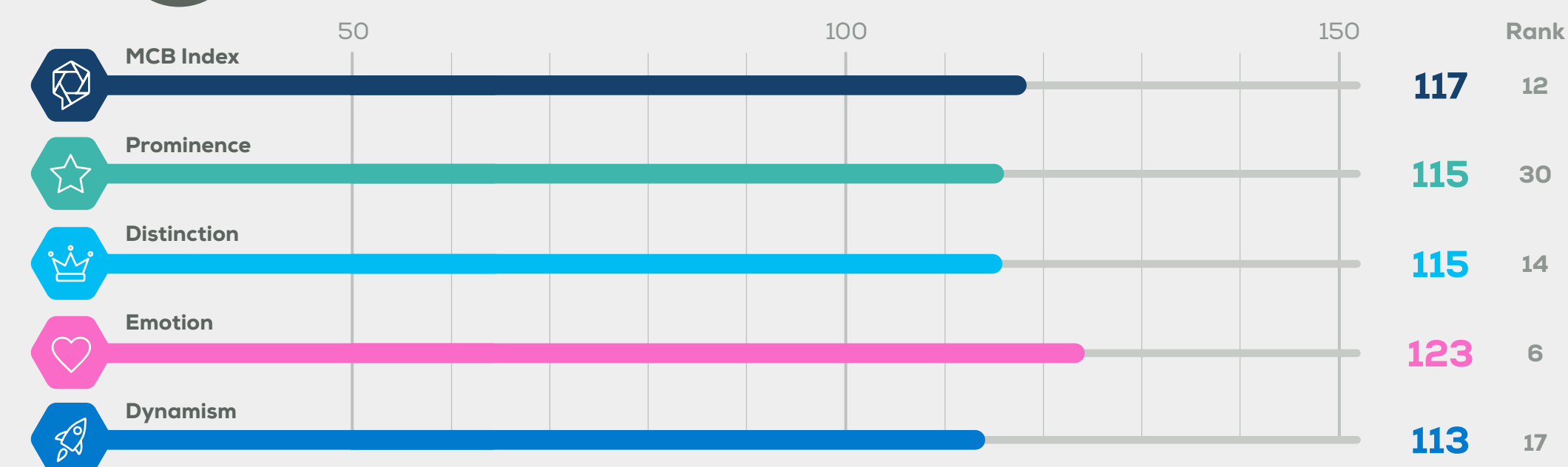
During the turbulent times of 2020 it appears people are wistfully reflecting on times gone by and yearning ever more for that family connection. We see a big jump in sentiment towards the brand with 77% of people associating it with happiness, up 21% on 2019. More people than last year also agree that Fairy is a brand that represents someone like them and/or agree that it understands what they want.

But Fairy's success wouldn't exist if the product wasn't up to scratch and Fairy's other core strength is that it consistently delivers. Its credibility and "lasts longer" reputation is built on tried and tested formulas that work. Just over a third of people agree that Fairy is a brand that they 'can't live without'.

In recent years, the brand has taken pre-emptive action against the thing that threatens all legacy brands: the risk of being left behind. Like other P&G brands, Fairy has taken a lead in committing to making bottles from recycled plastic and to ending the use of phosphates in dishwasher tablets. If it manages to do so, we think we can expect another successful 60 years ahead.

2019
↑ 28th

The Most Connected Brands 2020



Brand expert view

FAIRY

From its origins as a humble bar of soap in 1898, Fairy has built on its sound principles of cleaning and caring to become the firm market leader, the nation's favourite washing up liquid, the brand that families (both mums and dads these days of course) have grown up with and trust.

Consistent messaging has helped – combining efficacious cleaning while being kind to hands and body, backed up by value for money. So too have the years of being passed down from generation to generation, supported by iconic TV advertising, and in more recent times a move towards sustainability initiatives with 'Fairycology'.

Still the dominant player in washing up liquid, Fairy has cleverly diversified over the years and is now a serious contender in other fabric and home care markets too. This will have kept the brand growing and relevant, but there has also been a noticeable shift in the approach to communications that

suggests the brand is moving with the times, actively listening to its family consumers and evolving accordingly.

The advertising has always been simple yet emotive, highlighting performance through longevity and cleaning messages. But now we're seeing inspiring, yet relatable and relevant, celebrity parents featured (not just mum/daughter) to drive emotional connections with the new mums and dads of today. #ToMyBaby is a lovely integrated campaign built on a simple, universal desire parents have for their children's wellbeing in these more complex times. The campaign also connects to a relevant cause, Great Ormond Street Hospital, which reflects the growing need for young consumers particularly to tangibly see that a brand they buy is behaving responsibly and cares about the same things they do.

And it is connecting to the younger, new consumer that is perhaps Fairy's biggest challenge going forwards – the brand didn't appear in the top 50 last year with 18-34s (whereas it nearly made the top 20 with over 35s). Neither did it feature in the top 20 most socially responsible brands. We are Futures

own recent research (with Opinium) supports this, highlighting that these younger, new consumers are much more likely than any previous generations to question and select brands based on authentic shared values of fairness and equality, transparency and sustainability.

Fairy has made a great start though, with the rebranding of Fairy to 'Fair', in partnership with akt (<http://www.akt.org.uk>) (the LGBTQ+ youth homelessness charity working within the family unit) and the creation of the Fairy Beach Plastic bottle (made from 100% recycled plastic and ocean plastic) to help clean up UK coastlines, both demonstrating the brand's desire to promote positive change.

So, while other brands will continue to challenge, Fairy is aware, listening, and responding well. In the context of coronavirus, its combination of cleanliness and kindness will be very relevant going forwards too. All pointing to a brand that is as relevant today as it was yesterday – and will no doubt continue to create a sparkle for years to come.

Alex Young
Managing Director, We Are Futures



BBC

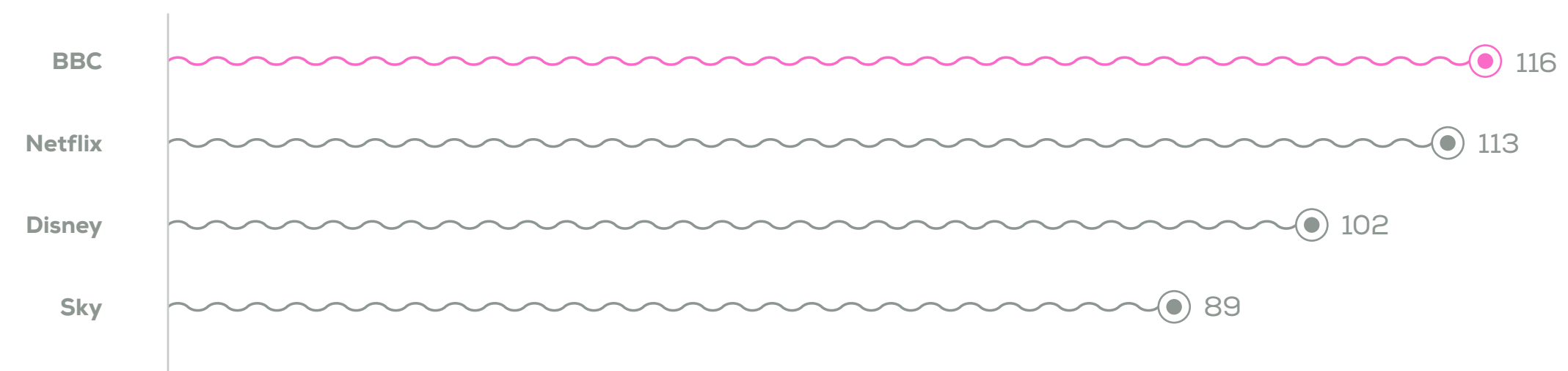
Streaming up the rankings

The BBC jumps up the rankings this year, moving up eight places into the 11th spot, and clawing back some of the losses it suffered last year.

A long-standing British institution, the BBC continues to be regarded by the public as an iconic brand, and the 26.2 million TV licences in use last year is testament to the fact that it is one that many can't live without.

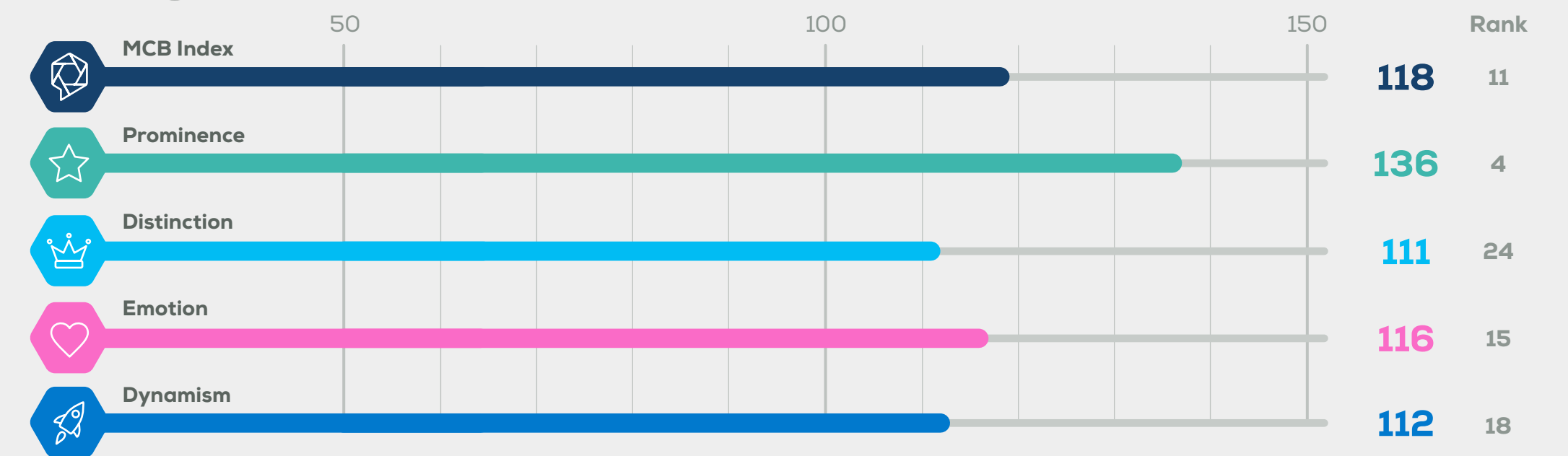
Although outperforming on all key drivers, its strength clearly lies in making an emotional connection with consumers, more so than any other media and entertainment brand. An organisation that has been around for nearly a century, it continues to offer the UK public a sense of inclusivity, brand purpose and values that they can relate to.

Emotion Index



2019
↑ 19th

The Most Connected Brands 2020



11th BBC

However, despite driving a positive emotional connection, the BBC continues to face increasing competition from on demand media and entertainment services. These brands are putting enormous production budgets behind shows to create immensely popular programming, generate a great sense of buzz and provide anticipation and excitement for viewers.

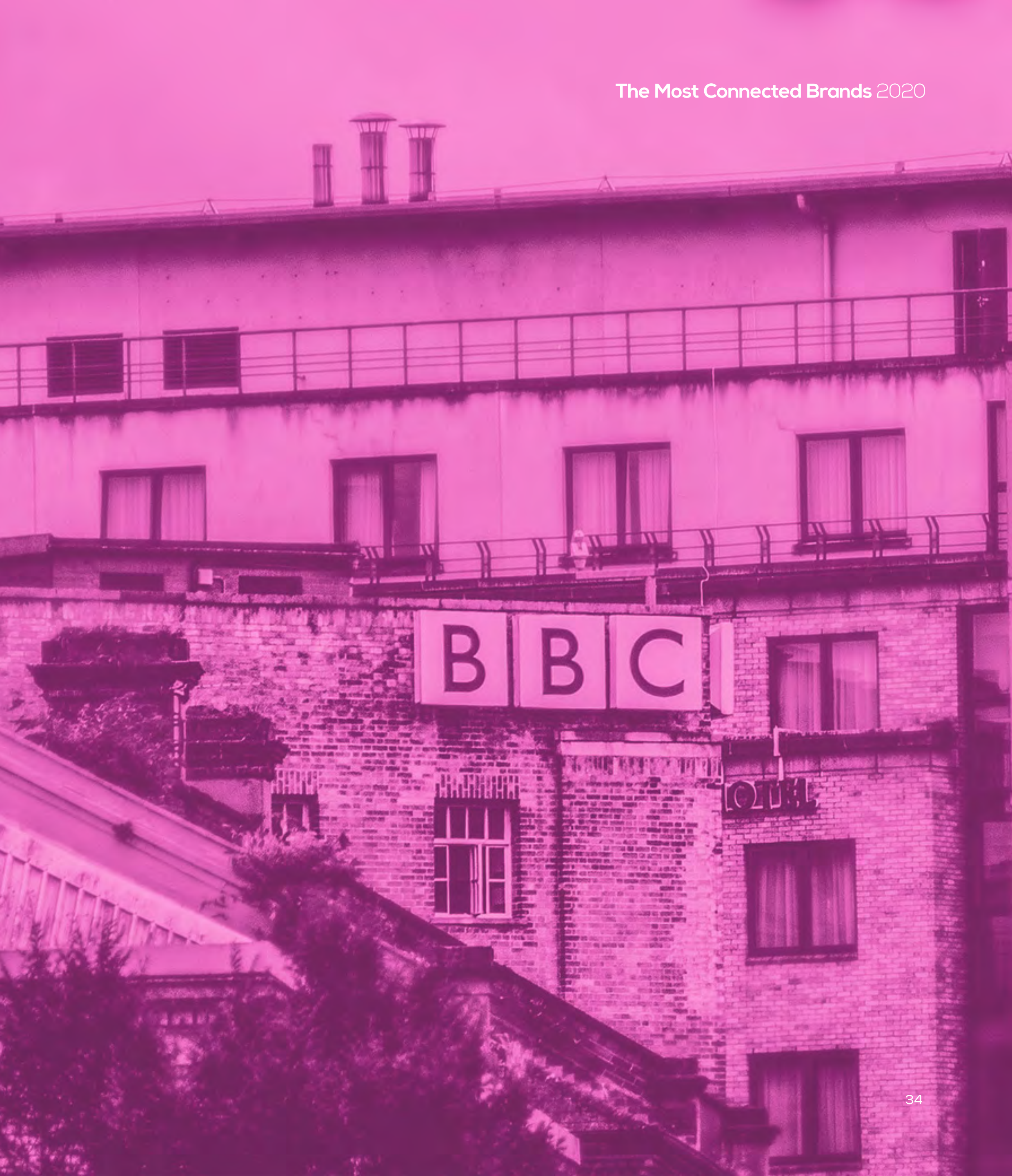
What is striking is the marked differences in attitudes towards the BBC across generations. Whilst the brand favours hugely with older audiences, younger viewers are turning their attentions elsewhere. And this is where the greatest challenge for the BBC lies. Netflix, Disney and Sky are far more successful in captivating the younger generation, creating a buzz by pushing the boundaries with their content and continuously surprising, amusing and delivering a great experience to viewers.

In an age of streaming and subscription services, the traditional TV licence arrangement is starting to look increasingly antiquated and progress is needed in order to stave off the competition and future proof the brand.

But it’s not just the challenge of the declining popularity amongst younger audiences that the BBC faces. Accusations of elitism and a liberal institutional bias is perhaps the reason why the organisation over indexes on evoking emotions of anger and disgust. With No 10 threatening to scrap the TV licence fee, the BBC faces bigger existential issues and is undoubtedly facing one of the most testing periods in its history. However, it remains resilient, as it continues in this period of uncertainty, to be one the UK’s most connected and trusted brands. A brand that is long known as a valuable institution and a globally respected broadcaster, it is worth future proofing as a precious UK asset.

MCB Index Ranking

	Overall ranking	18-34	35-54	55+
Netflix	4 th	3 th	5 th	22 nd
BBC	11 th	41 st	28 th	2 nd
Disney	33 rd	6 th	33 rd	58 th
Sky	49 th	31 st	52 nd	56 th



Brand expert view

BBC

At nearly 100 years old, the BBC faces an existential crisis from market disruption and political pressure on its public funding model. It is still the best and most respected public service media organisation in the world. A giant with an unparalleled history of innovation, world-class talent and outstanding output. The creative powerhouse at the heart of British media and beyond.

Its primary challenge today is to stay relevant, especially among younger audiences, reaffirming its public service value in a constantly changing media landscape dominated by digital platforms.

The BBC is not just about content, it is about enriching lives. It plays a vital role in British culture, connecting people and communities. It comes as no surprise that the public loves and relates to this iconic brand, which moved up eight places in the ranking, first among entertainment brands for Emotion.

Today's Most Connected Brands are built around user experiences and technology habits, not just media habits. Despite being a first mover with iPlayer, the BBC faces an uphill struggle to keep people watching, as audiences are increasingly turning to new digital platforms. Audiences connect with brands which add value to their lives. The Reithian mission to inform, educate and entertain is more relevant than ever, but how is does it come to life? How do audiences experience its value? A new vision of public service media is needed for the 21st century.

The BBC's response to the COVID-19 crisis reminds us of its purpose. At times like these citizens need sources they can trust. The BBC didn't only communicate its relevance, it demonstrated it. Some of the BBC reporters are designated 'key workers', alongside nurses and bus drivers. Their actions reflect the clarity of its mission. To serve the community, enriching lives. No better way to demonstrate the need for public funding. Viewing figures grew 44 percent from last year, and – crucially – 67 percent among 16 to 34 year olds.

The same clarity and leadership are required to face internal challenges. Most people love the BBC's output, yet deplore its overblown corporate body. Industrial-era structures and

cultures encourage 'silo' mindsets, with different parts of the organisation battling for power and influence as they compete for resources.

Every Director General of the past 30 years confronted the problem of transforming the organisation while preserving and nurturing its creative superpowers. It's the best and hardest job in media. Incoming DG Tim Davie declared key priorities: to accelerate change and enable the BBC to increase its relevance. This extraordinary moment provides an opportunity to do so at a much faster pace than before. We are primed for change.

Connected media brands produce value in two ways: creating stories and experiences that add value to people's lives and providing the means to access them where and when matters. To do so, media organisations need to reduce their complexity and develop agility at scale (and pace) – connecting internal culture and processes with purpose, output and communications. Rather than competing, creative, production, technology and marketing leaders must adopt a collaborative mindset in the pursuit of common goals as they collectively develop the ability to meet and anticipate audiences' needs in rapidly evolving media ecosystems.

Federico Gaggio
do&.co



YOUTUBE

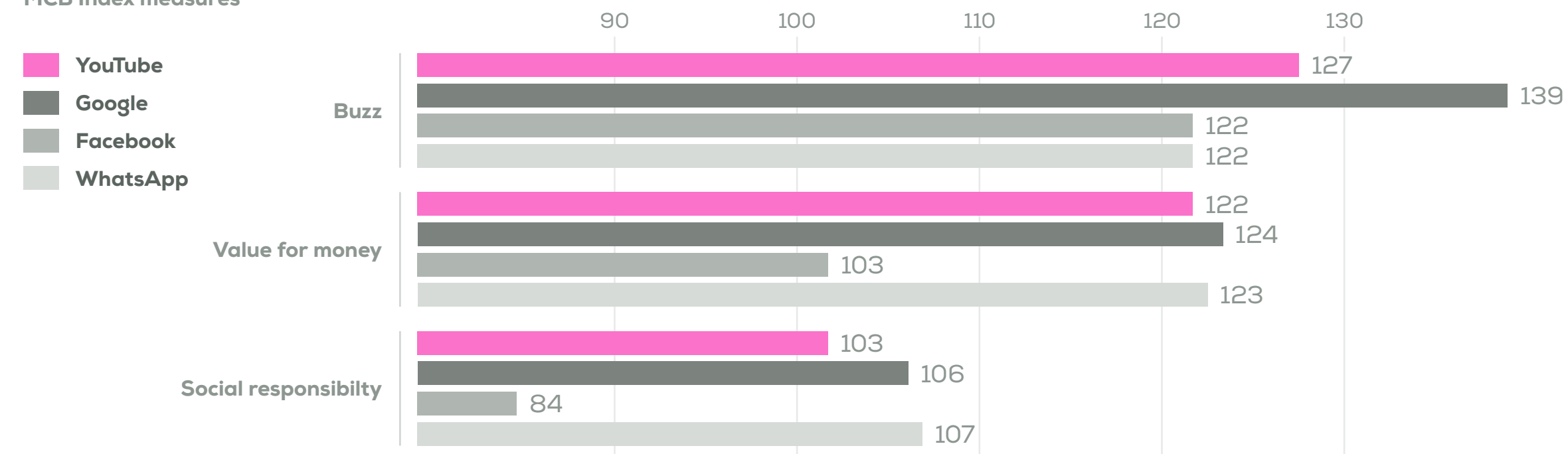
The ‘forgotten’ tech brand

Given the ubiquity of YouTube, it is remarkable how little media attention is paid to the video streaming service compared to other major tech brands. What started as a site for sharing family and entertainment videos has become the moving wallpaper of the modern world, adorning our lives with billions of hours of footage and influencing everything from childcare to culture to politics.

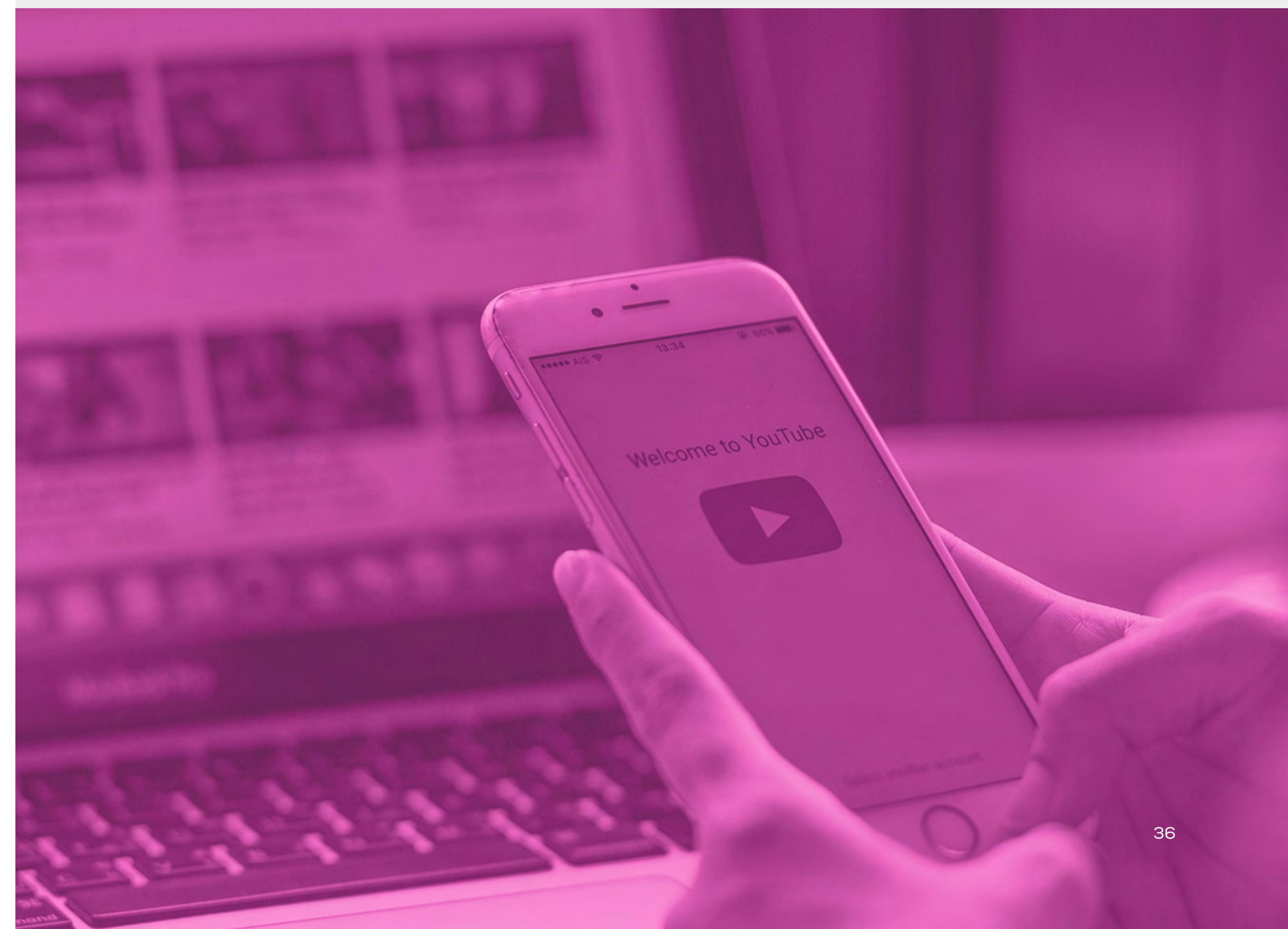
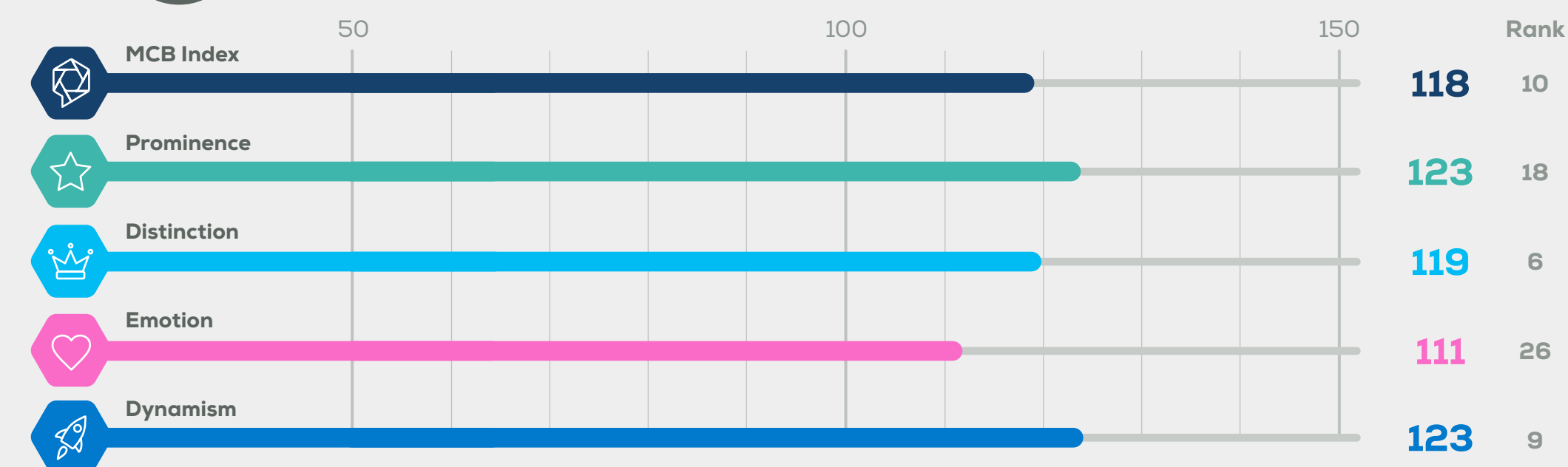
For UK consumers, YouTube certainly doesn’t blend into the background. It has been in the Top 10 Most Connected Brands in the UK for the past three years running.

Like other tech brands in our index, the site scores especially highly on Buzz (127) and Dynamism (123). Despite the launch of paid subscription services, its basic product remains free, giving it a high ‘value for money’ (121) rating.

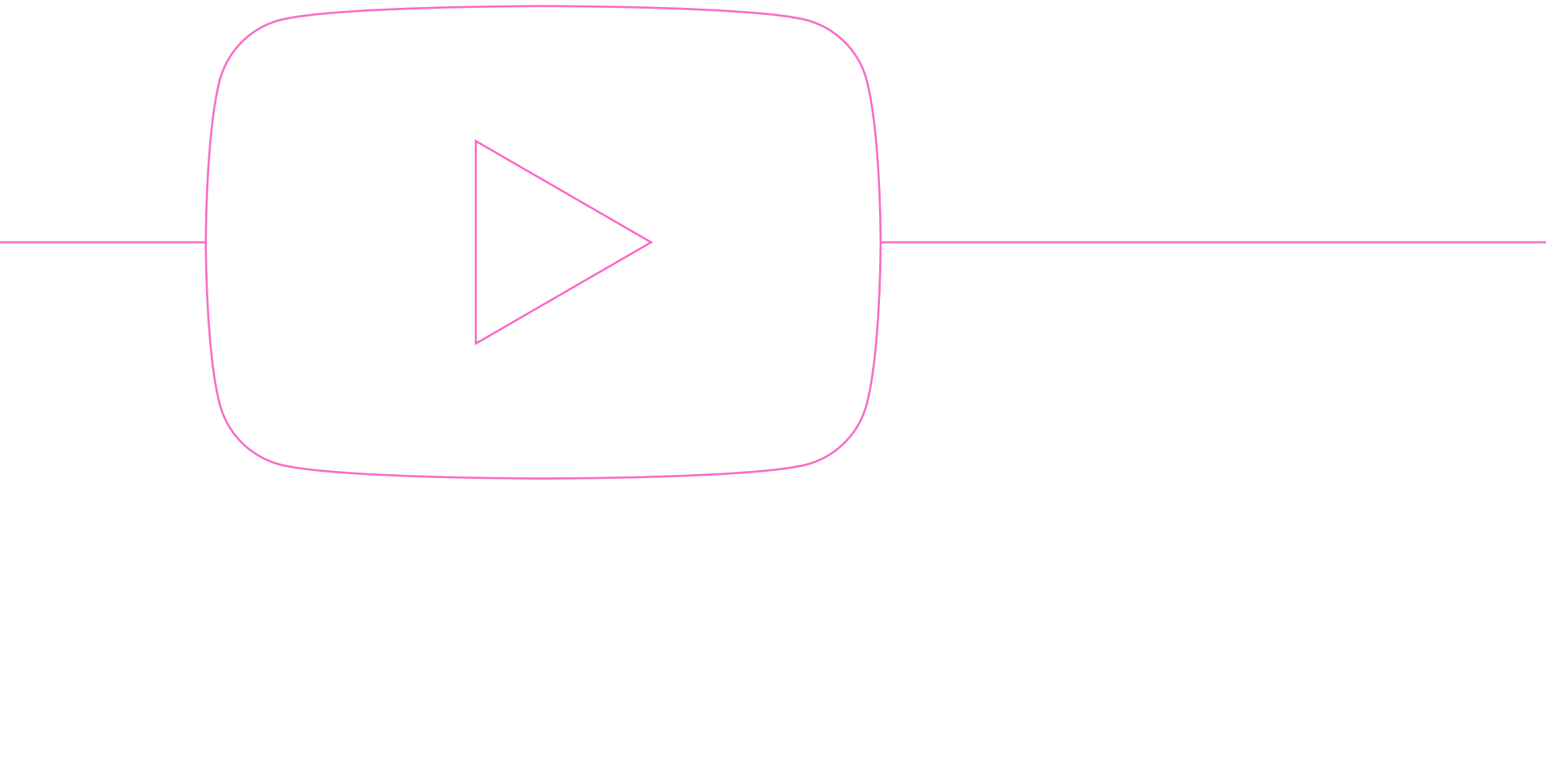
MCB Index measures



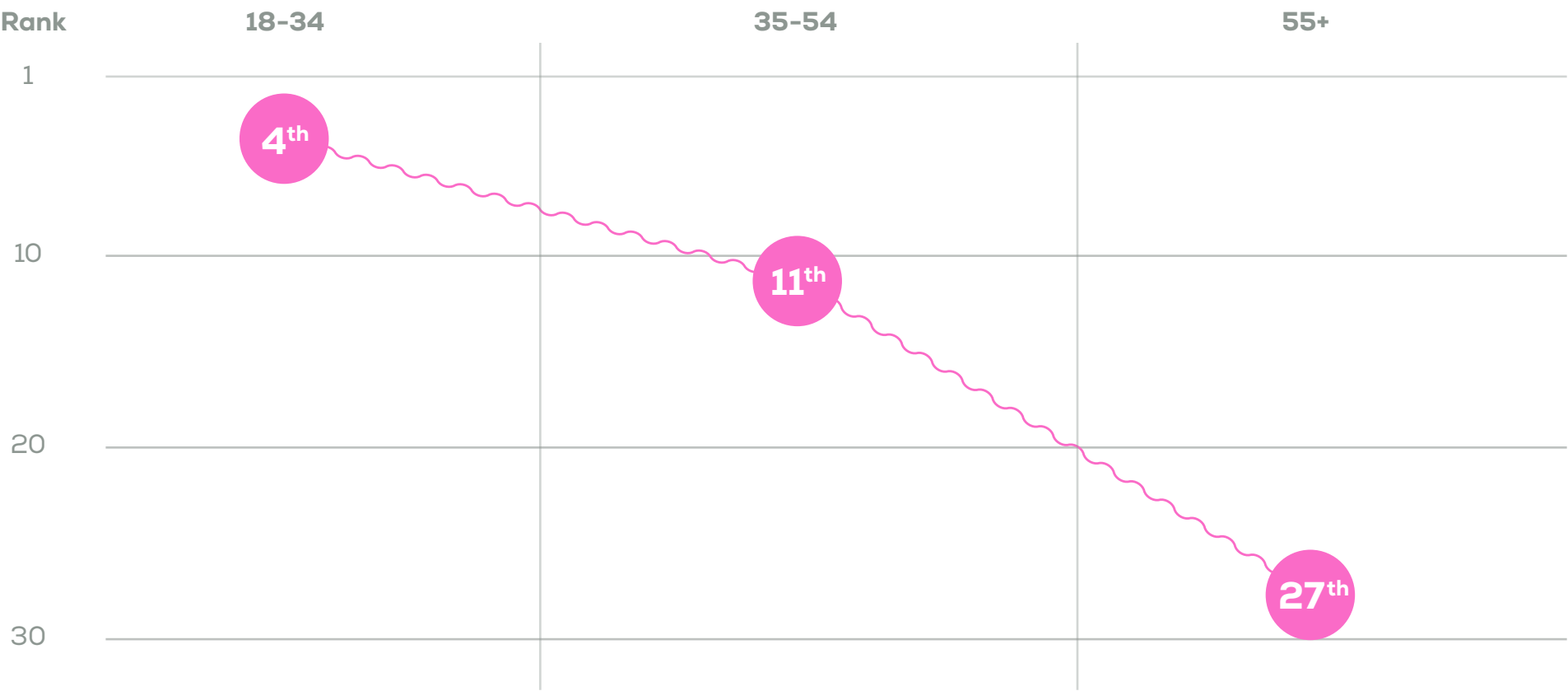
The Most Connected Brands 2020



10th YOUTUBE



YouTube MCB Index by age group



Increasingly, however, consumers are recognising the trade-offs that come from free tech services, hence its relatively lower scores for Satisfaction and Social Responsibility (both 103).

In YouTube’s case, the company pursued a relentless strategy of increasing consumer engagement to build revenue – the more hours of videos users watched, the more opportunities there are to sell ads.

As part of this strategy, it developed algorithms to keep users engaged. At first, this involved simply finding similar content – cat videos begat cat videos – but the site shifted to more sophisticated recommendations.

What even the founders of YouTube didn’t fully grasp when they launched the site was the power of moving images to inform, not just entertain. For consumers, watching something being explained by a real person is far more engaging than reading an article and the site now plays a pivotal role in the way millions learn about and perceive the world.

This is particularly true for those aged under 34, for whom YouTube has likely been a central part of their lives from a relatively young age. For 18-34 year-olds, YouTube sits fourth in our index, compared to 11th for 35-54s and 27th for those over 55.

However, the confluence of these trends has created a potentially dangerous situation for the brand. YouTube has become one of the central distribution points for misinformation, conspiracy theories and fake news. For users who simply stumble across something even semi-related, YouTube can often promote more extreme content.

Governments, the mainstream media, and the public have increasingly taken note. Perhaps this is one of the reasons for YouTube’s fall in our index from eighth in 2019 to 10th this year.

In response to this reputational threat, the company has now accepted it has a responsibility not to promote misleading or radicalising content.

During the Coronavirus crisis, accurate information has been of vital importance yet also seriously challenged. YouTube has responded swiftly and well, taking down thousands of videos promoting false and dangerous information. Under videos relating to the virus, there are prominent links to official and reliable sources of information.

It is easier to address unsubstantiated conspiracy theories than more complex and fraught political issues, such as identity politics or climate change. The challenge for YouTube will be whether it can adequately address itself to these issues without alienating the many diverse users that have made it such a central part of the way they consume information.

Brand expert view

YOUTUBE

The best part about YouTube is that it plays a significant role across a variety of needs (entertainment, education, information). The worst part about YouTube is trying to understand what it really stands for.

YouTube's mission is to "give everyone a voice", which means it needs to position itself as a democratiser. The real question is, where is the biggest growth opportunity for them to express that position for the next decade? Education and information are important categories that have not been fully cracked in the digital economy, but they are still dominated by legacy names and complex bureaucracies. You may have read the full Oxford University curriculum through the internet, but that doesn't carry the same labour market value of having the actual graduation paper. So, YouTube's biggest opportunity is around entertainment.

But entertainment is its own beast. Full of opportunities but also threats. Without going vertical by vertical, we can broadly split the market based on content type (more user-generated content or more professional) and consumption mindset (shorter-form when browsing, longer-form when leaning back). This can help us understand YouTube's range of competitors, which today might go from TikTok and Snapchat (shorter UGC), to Netflix, Apple and Amazon (longer and professional), to Twitch (longer UGC) and possibly Quibi (shorter and professional). From a pure brand association point of view, YouTube is not directly competing with the streaming wars, but the reality is more time spent on streaming will erode time spent on YouTube, and that's a business problem that will never fully go away.

This range of competitors is why YouTube has a range of competing strategic imperatives: first, to develop the next generation of creators (in terms of their presence but also monetisation options); second, to retain the current range of creators (through, for example, exclusive contracts); third, to diversify its own business model via

paid subscriptions, especially through a growing music catalogue and original video content.

By virtue of its size and position as a democratiser, YouTube is now under constant pressure to stay open to everyone, without pissing anyone off (a battle it shares with any platform powered by user content). The rise of misinformation practices, conspiracy theories and deep fakes also have made brand safety a hot topic again (though it never really went away).

This is why YouTube needs to double down on its role as a democratiser. It needs to continue showing it's a credible and safe platform for all brands, while retaining its sense of vibrancy in popular culture in order to continue attracting creators and retain users. By doing this, it will be able to continue justifying ad spend (the lion's share of its revenue and profit), increase its quality perception to justify more premium subscriptions (a possible long-term bet), and reinforce its position as a powerhouse of both mainstream, vertical-specific and emerging cultural narratives.

Rob Estreitinho
Senior Strategist, VCCP Kin



Supermarket sweep

Aldi occupies ninth position for the second year in a row and is still the only supermarket to feature in our Top 10. Of the 10 supermarkets that make our Top 100 Most Connected Brands, Aldi maintains its spot at number one, fighting off competition from heavyweights such as Tesco and Sainsbury's as well as its main discount competitor, Lidl.

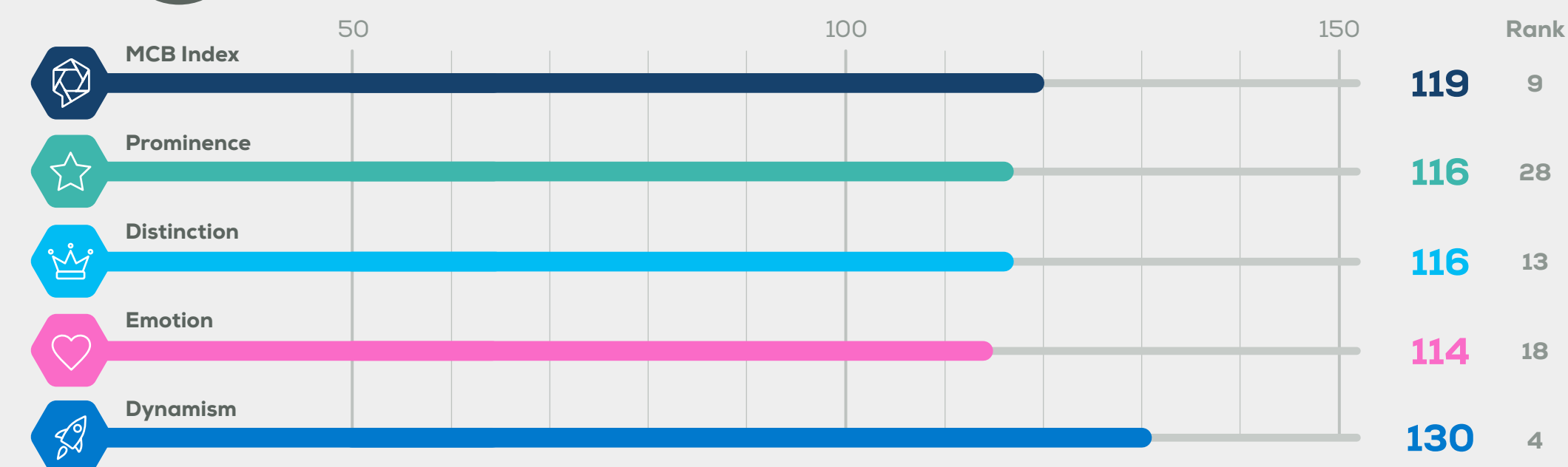
Providing quality produce at affordable prices is what Aldi is known for, scoring the highest in our Index on 'value for money' and 'having great promotional offers'. But Aldi goes beyond this, also aligning itself very closely with consumer needs. It scores the highest out of all brands in our Index on 'understanding what is important to me' and 'representing someone like me', positioning itself as a brand for the people. Aldi also ranks second for social responsibility and as having 'values or ideals that you can relate to.' A combination of sourcing products responsibly in the supply chain, reducing its impact on the environment, supporting local causes and being great employers, all further enhance the brand's connection with consumers.

Last year Aldi's popularity was amplified amongst the over 50s, however, this year it drops 10 places from fifth to 15th. Instead, it is the 18-34 category who are driving the brand performance this year, possibly as a result of several Aldi Local stores opening in London and providing a welcome route for young people living in the capital to save money. A growing focus on sustainability, recycling and reducing packaging waste as mentioned above, could also be paying off as all of these initiatives are known to resonate more widely with younger age groups.

Within the wider retail sector, Aldi scores higher than average on each of our four core measures of Emotion, Prominence, Distinction and Dynamism. It is the latter that has solidified its place in the hearts of the nation and why it has kept its spot in the Top 10 this year. A dynamic brand is one that is becoming more popular with consumers and one that is increasingly heard about. Aldi's advertising spend suggests how the buzz around the brand has been generated, with overall spend up 15% from £54 million in 2018 to £62 million in 2019.

2019
= 9th

The Most Connected Brands 2020



TV is the dominant media channel and is used consistently over all 12 months; however, their blend of different media surrounding key events throughout the year can only help spread the Aldi love.

With such strong endorsements on the things that matter to consumers, it's no surprise that Aldi falls into the Top 10 Most Connected Brands of 2019, clearly hitting all of the right notes over the last 12 months. The spotlight has firmly been on supermarkets throughout the Coronavirus pandemic and it has never been more important to connect with consumers and reassure them during this time of panic and uncertainty. Aldi is in a very strong position to build on its strengths during this time and solidify itself as the Most Connected Brand in the supermarket category for years to come.

Supermarket rankings

MCB Index ranking

2019		2020
9 th	=	9 th
18 th	↑	13 th
15 th	↑	14 th
20 th	↓	23 rd
26 th	↓	31 st
27 th	↓	39 th
37 th	↓	41 st
48 th	=	48 th
65 th	↑	58 th
78 th	↑	63 rd

ALDI

LIDL

TESCO

MARKS & SPENCER

SAINSBURY'S

ASDA

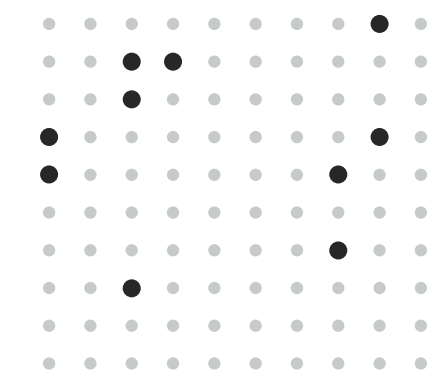
MORRISONS

ICELAND

CO-OP

WAITROSE & PARTNERS

Where supermarkets
sit in the Top 100



Brand expert view

ALDI

Aldi continues to take over the hearts and purses of the British public and, as a recent Aldi convert, I am really not surprised. As a brand it knows its audience and isn't afraid to be different from competitors.

For many families who are now buying more food to eat and make at home, its low price point has clearly become a big selling point. If you can see a considerable difference in the price you are paying at the till it is going to make a difference. However, Aldi's positioning is so much more than just price, it has managed to connect with its consumers on a number of levels.

It was one of the first supermarkets to stock fresh local produce where possible and, as many consumers start to ask more questions about where their food has come from, this has ticked a big box for corporate responsibility.

Secondly the own brand products are really good. If any supermarket is going to persuade brand loyal customers to try its own products, then Aldi is the one. It has made a point of ensuring its own brand wine is a really good quality at a very reasonable price. For any discerning shopper who doesn't want to sacrifice quality over price then it's the place to head.

Pre-lockdown whenever I went to a friend's for dinner, I couldn't help noticing the Jo Malone candles were being swapped for Aldi's Hotel Collection candles.

Furthermore, an absolute winner for Aldi is the 'special discount aisle' in the middle of the shop and from the sales it generates I don't think I am on my own in thinking this. This is very clever marketing from Aldi: what looks like a random collection of 'treat purchases' similar to an adult version of a lucky dip is actually very well planned and seasonal. It's lovely to be able to buy a treat for the children, the garden or your home.

During lockdown one of my favourite memes was...

Latest purchase limits placed on shops in light of the Coronavirus due to panic buying:

ASDA: 2 hand sanitizers and a 4 pack of toilet rolls

TESCO: 1 hand sanitizer, 500g for rice and 4 pack of toilet rolls

ALDI: a MIG welder, a pink sports bra, 2 trumpets and a wet suit...

Aldi is prime example of how a foreign-owned company can quickly become a market leader and in a year when we face continued uncertainty in what we buy and how much we spend I can only see Aldi's dominance continuing to grow.

Louise Ahuja
Director, LouiseBComms



HEINZ

Not kicking the can

Heinz retains a spot in the Top 10 Most Connected Brands Index for the third year running, which really reflects the strength of feeling that consumers have towards this fantastic heritage brand.

Heinz is a brand that is well loved, and consumers know they can rely upon. As a result, they do so time, and time again.

These sentiments are reflected in our data: Heinz is ranked fourth on Emotion and is the top-rated Food and Drink brand that consumers ‘couldn’t live without’. At a time of great uncertainty, its strong rating as a ‘brand that makes people smile’, coupled with its perception as ‘an iconic brand’, is also likely to stand the business in good stead.

Consumers’ love for the brand is based on the fundamentals of strong product performance. Heinz is ranked sixth in the Top 100 on its ability to ‘meet consumer needs’ – well ahead of many of the tech brands which offer tailored consumer experiences and service – and is, unsurprisingly, rated highly for delivering ‘great products and services’.

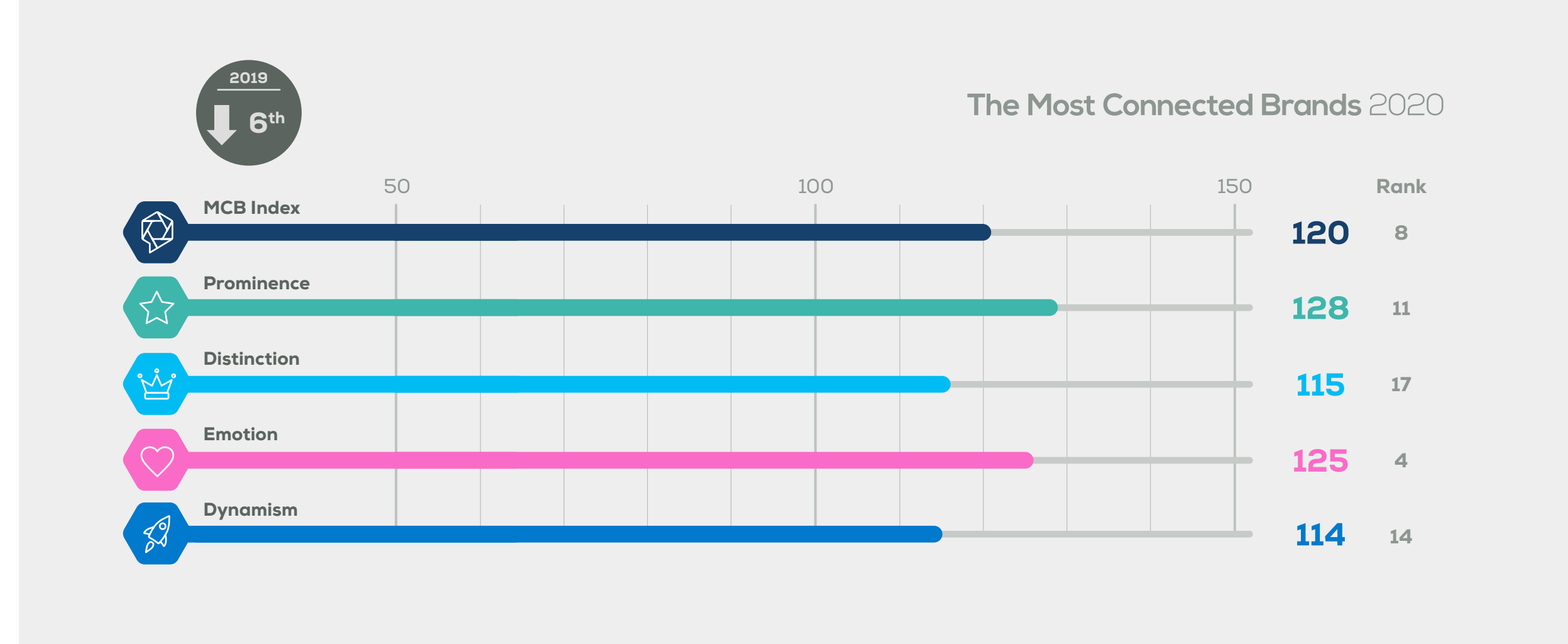
As one of the country’s most loved brands, Heinz also has the confidence to experiment. Stunt innovations such as their Creme Egg Mayo and partnerships with Ed Sheeran have seen Heinz embrace its playful side as the brand continues to grow its connection with consumers and target a younger audience.

It’s not all fun and games

Heinz products were one of the first things that disappeared off the shelf during the panic buying frenzy that engulfed our supermarkets. The brand’s response? If shoppers couldn’t get their products, then Heinz would take the products direct to the consumers.

In early April Heinz launched its first online shop “Heinz to Home”, delivering bundles of classic Heinz products with free delivery for frontline care workers direct to people’s homes, helping the public to keep safe and helping to lift the burden off the supermarkets. It was a response you would expect from a brand built on such emotional territory.

Although Heinz is therefore a brand that enjoys a cherished place in the public’s hearts, it does not take it for granted and works to retain that brand love and loyalty.



Brand expert view

HEINZ

As one of the most loved and trusted brands on supermarket shelves, Heinz shopping basket essentials are as relevant today as when they were first sold in London's Fortnum & Mason. They have simply become part of the national diet, offering mealtime favourites for everyone.

In this extraordinary year of Covid-19, Heinz stepped up to feed the nation like never before and meet the huge demand to provide comfort foods to families nationwide. Heinz also stepped up to help those in special need. Following the closure of schools in March, we announced a donation of 12 million free breakfasts to disadvantaged children at risk of starting the day hungry without their usual free school breakfast, through our charity partner Magic Breakfast.

In April we announced the launch of 'Heinz to Home', our first ever online shop selling the nation's favourite canned foods to help feed those in self-isolation and deliver thousands of Heinz meals, favourite sauces and bundles of Heinz baby foods direct to those struggling to access food essentials.

We partnered with Blue Light Card, the UK's number one discount service for NHS, Emergency Services, Social Care Workers and Armed Forces, to ensure all frontline workers received free postage and packaging and priority shipments on all orders.

And in May, as social distancing and self-isolation had become the norm and online searches for jigsaw puzzles rocketed since the Covid-19 lockdown began, Heinz Tomato Ketchup released a puzzle of its own with 570 pieces, all identical Heinz red. It might just be the world's slowest puzzle ever made.

Of course, Heinz is known for its iconic slow-pouring ketchup. In a period when everyone has a little more time on their hands, we wanted to help pass the time by connecting the two. We're always looking to deliver fun, contextually relevant ways to give Heinz Tomato Ketchup lovers a smile, and this ridiculously slow, all-red Heinz Tomato Ketchup puzzle felt like the perfect fit.

Heinz continues to connect by building on its heritage of quality and transparency; offering delicious family favourite food; and by innovating to accommodate changing consumer needs.

As Henry J Heinz said himself: "To do a common thing uncommonly well brings success".

Nigel Dickie
Director, Corporate & Government
Affairs EMEA, Heinz



Going low to stay high

Does a brand need to be loved to do well?

Not always.

Apple is up seven places in this year's ranking and back in the Top 10, but maintains a distinctly mediocre performance in Emotion, sitting all the way back 33rd on this metric. In fact, they've consistently underachieved on consumer love since our first edition of the Most Connected Brand Index, despite this being the largest driver of brand usage in our model.

So, what gives?

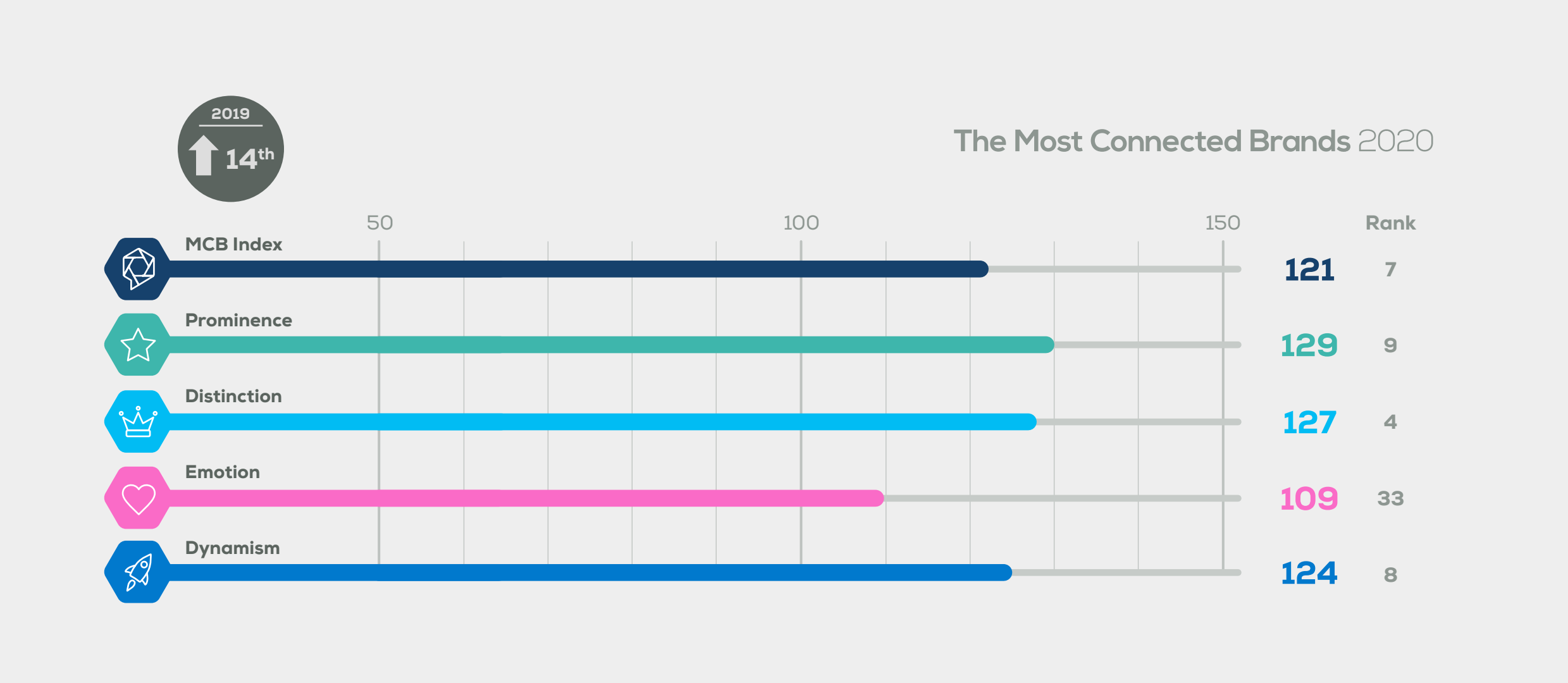
	2018	2019	2020
Overall	5 th	14 th	7 th
Emotion	33 rd	47 th	33 rd

Well, to put it simply, they've made it as easy as possible to own an Apple product, maintaining high levels of mental availability and, more importantly, pushing into the mass market with lower costing products.

Remaining aloft through prominence and brand image

Apple have very little problem with brand salience, maintaining high TV and OOH spend in support of product launches, as well as through digital ads that have been used to push messaging on their user data security measures. It's not news that UK consumers see Apple as iconic, but that it is the 3rd most associated brand with 'security' proves that it's always on messaging is hitting the mark.

Whilst not as dynamic or distinctive as in 2018, Apple is still rated as the brand most looking to push the boundaries, a position it has maintained over the years despite the stagnation in physical product feature innovation.



7th APPLE

The fact that the majority of changes between iPhones and macs have been under the hood seems not to matter when you’ve built such a strong image on your ground-breaking heritage and free-thinking founder.

The other twin pillar to the Apple image, that aura of premiumness and exclusivity, also remains rooted in our memory structures. In fact, Apple ranks a stonking 97 out of 100 in terms of being inclusive and 80 out of 100 in catering for diverse groups of people. Remember, this in spite of Apple owning over 50% of the UK mobile phone market, almost double that of its closest competitor Samsung – so hardly that exclusive.

Apple’s combination of mental availability and brand distinction is enough to make Byron Sharp get up in the morning and add them as an example in his best-selling book, and yet, none of this matters without increasing the number of people actually buying their products.

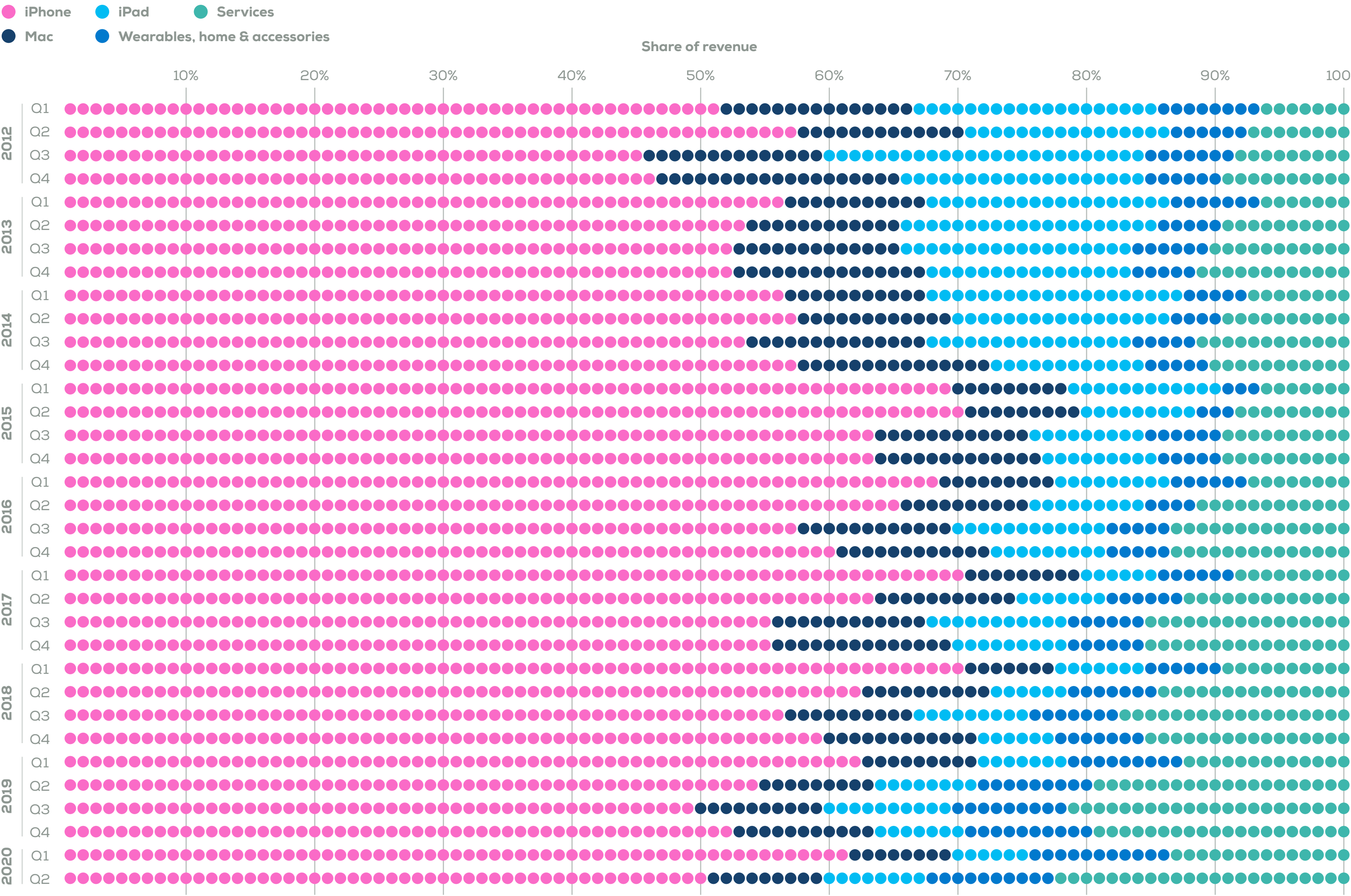
Pushing premium to the mid-market

Over the last eight years, roughly 75% of Apple’s revenues have come from either their iPhones, iPads or Macs, and so to reach more of the market, they’ve turned to creating cheaper versions of their devices (or has everything else just got more expensive?).

The iPhone XR, re-vamped iPhone SE, re-emergence of the MacBook Air and even iPad Air have helped to bring that feel good premium innovation to the masses. See the results for yourself: Apple comes 9th in brands that you can’t live without, on par with social media giants and supermarkets, and 6th in terms of providing a sense of belonging.

They might not be as loved as 33 other brands in here, but when it comes to nailing the basics, Apple has it in spades.

Apple’s revenues by product





SAMSUNG

Another bite of the Apple

Samsung has dropped slightly in the 2020 Most Connected Brands UK ranking to sixth, two places lower than 2019. However, encouragingly for the brand they remain just ahead of Apple, their key smartphone rival, who is in seventh place.

Despite continuing to hold a solid position inside the Top 10 by maintaining or improving their position in most metrics, they have experienced some key losses. Their score for Emotion, which plays an important role in the technology sector, has dropped from sixth place to ninth. They have also fallen four places from eighth to 12th for the metrics “meets need” and “satisfaction” and falling five places in the “use again” category from 15th to 20th.

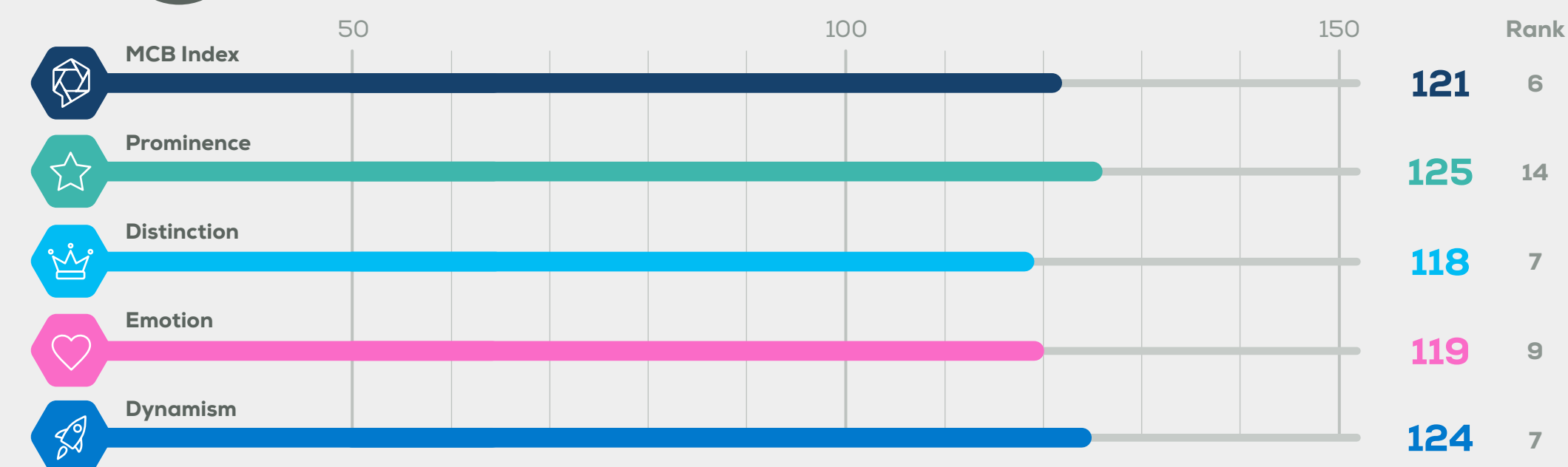
This has been a hard year for Samsung, starting with having to delay the launch of their folding phone, the Samsung Galaxy Fold, from April to September due to issues with the new

screen technology. Then in December an update to software on many Samsung smart TVs meant that customers were not able to access BBC iPlayer over the Christmas period. These events could explain why consumers who associate Samsung with anger and disgust feel these emotions strongly.

Yet whilst Samsung has embraced innovative technology such as the Fold, they are still falling behind their smartphone competitors when it comes to being seen to push boundaries, where a third of consumers associated this with them, compared to 56% for Apple and 50% for Huawei. If we look at consumer confidence in their products in relation to their TV competitors, Samsung falls in a close second, with 58% of consumers thinking of Sony as a brand that offers great products and services, and 56% saying the same for Samsung. While less than half (44%) said this for Panasonic.



The Most Connected Brands 2020



6th SAMSUNG

Even with these setbacks Samsung has jumped up dramatically in the rankings for social responsibility from 35th place in 2019 to 17th in 2020. Social responsibility is something that all technology companies battle with, plagued by their products requiring the use of diminishing minerals from questionable sources, and single use plastic components in their products. Samsung have tried to combat their environmental footprint where they can, with a pledge that the packaging used for their products and accessories, will be replaced with environmentally sustainable materials like recycled/bio-based plastics and paper.

More recently Samsung has announced that they are going to introduce new packaging to its TV range that will allow customers to be able to easily transform TV packaging boxes into other items such as magazine racks or even small houses for cats. It is perhaps moves like this and the Fold that is why consumers associate Samsung with the emotion 'surprise' more than its competitors.

Three key findings:

1

Samsung has suffered losses in key categories for technology/ consumer goods ("meets needs", "satisfaction" and "use again")

2

The brand has seen a huge improvement from last year on social responsibility

3

Despite innovative product launches Samsung is still not seen to 'push the boundaries'



WALKERS

The magic ingredient

Walkers remains one of the nation's best loved snack brands, and this year moves into the top five brands overall, rising nine places from 2019.

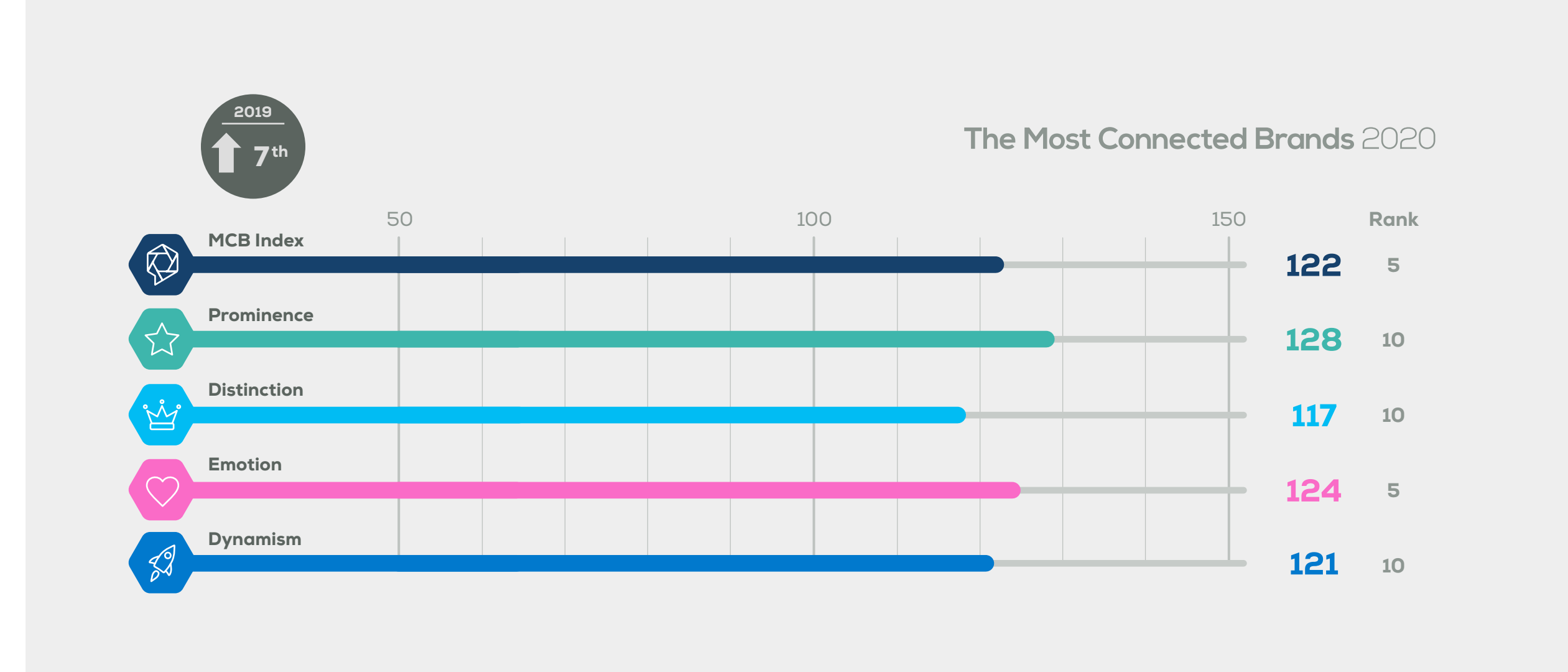
The brand is the second highest ranked food and drink brand behind Cadbury and in a category, which is generally the most connected, consumers feel particularly allied to the nation's favourite crisp brand – it's one they just can't live without for a third year running.

It's hard not to see Walkers as that essential everyday brand, it's a brand that people take to work, buy in the newsagent as a snack, share with friends in the pub and send their kids to school with – and is very much a staple ingredient of the British diet.

Whilst Walkers remains a truly iconic British brand, with over 70 years of heritage and strong local links, consumers also consider it one of the most Dynamic, with this particular association ever more apparent in 2020, with a five-point increase from 2019.

Evidence of its recent dynamism comes in the form of its partnership with some of the nation's favourite high street restaurants such as Pizza Express, Nando's and GBK. This clever partnership is bringing crisp munchers in Britain a new flavour range based on some of the best-selling dishes in the UK today as part of its Taste Icon range. Some very distinctive flavours are afoot! Indeed, the brand is now the most Distinctive it has been since we began tracking in 2018, which is a major factor in its overall rise to fifth place.

Walkers certainly has its finger on the pulse and yet remains very much a British icon, balancing heritage and forward thinking perfectly. It knows how to remain on trend, relevant and fun whilst never forgetting its long heritage and strong local links.



Although Walkers does not generally over index compared to other brands for any single emotional association, the brand's phenomenal placing derives from how consistently it over indexes on positive associations. Walkers has a very broad positivity that connects consumers across so many different aspects. Most notably, and oh so important for an everyday brand – it makes people feel happy and makes them smile, but at the same time makes them feel secure.

With an ever-expanding list of flavours and limited editions that are keeping the brand fresh, alongside ever-present classics, the magic ingredients of heritage and fun look set to see Walkers go from strength to strength.



Brand expert view

WALKERS

Against the backdrop of uncertainty that will come to define 2020, we are already seeing that heritage brands, who provide a comfort in the familiar, are likely to thrive.

And so one might expect Walkers, a national beacon of positivity, happiness and familiarity, to be a brand whose fortunes continue to soar over the next 12 months.

The 'watch out' in the current climate will be for the brand to continue to strike the delicate balance between playing to that much craved nostalgia, and keeping the brand evolving and relevant. Whilst the crisp market is booming (according to Mintel 93% of adults ate a packet last year), the fact that this growth is being fuelled by 'premium' and 'healthier' innovations will allow no respite for the ever-chugging Walkers NPD pipeline.

And what of the year ahead for Walkers advertising? As the marketing team look for a "fresh perspective for comms to stay relevant to modern Britain" there is a further balance of the old and new to be struck. One can't help but wonder if, after 25 years, Gary Lineker has lost his place (and his regular Walker's pay check) as the likeable, cheeky face of 'everyman' Britain. Indeed, appealing to the masses through populist advertising-led campaigns is arguably what the Walkers brand has done best over the years. Their 'Too Good to Share' creative platform allowed brand consistency and new news to walk hand in hand. Finding an advertising vehicle that keeps the brand moving with the times will undoubtedly be an area of focus.

The Spice Girls collaboration last year was a successful step in the right direction. One could surmise that this was in no small part down to the fact that the Spice Girls' present-day resurrection itself was a strategic 'gift' wrapped up in a union jack bow. The long-perfected Walkers recipe of nostalgia,

populism and new news made them a powerful 'brand fit'.

Now it appears the brand is seeking new ways to reach the hearts, minds and lunchboxes of 'younger audiences' and 'millennial families'. We see that 'engagement' and 'talkability' is high up on the checklist for new campaign deliverables for the year ahead. No doubt the team will be ever-chasing their 2008 masterstroke invention of 'UGF' (User-generated flavours). But the true achievement of its marketing is that, for a heritage brand established over 70 years ago, Walkers has always been abreast of the current zeitgeist. The Walkers brand is a shiny foil comforter of joy, our familiar childhood friend who to this day still makes us smile. Yet it is also one million 'Do us a Flavour' votes, their 'Taste Icon' partnerships and 'Cajun Squirrel'(!) This tension needs to be resolved with a clear creative platform if the brand really is leaving behind 'Too Good to Share'. Fernando Kahane, Walkers Marketing Director talks about moving the brand from the "business of crisps to the business of enjoyment". That seems like a good place to start.

Zoe Crowther
Managing Partner, Red Brick Road

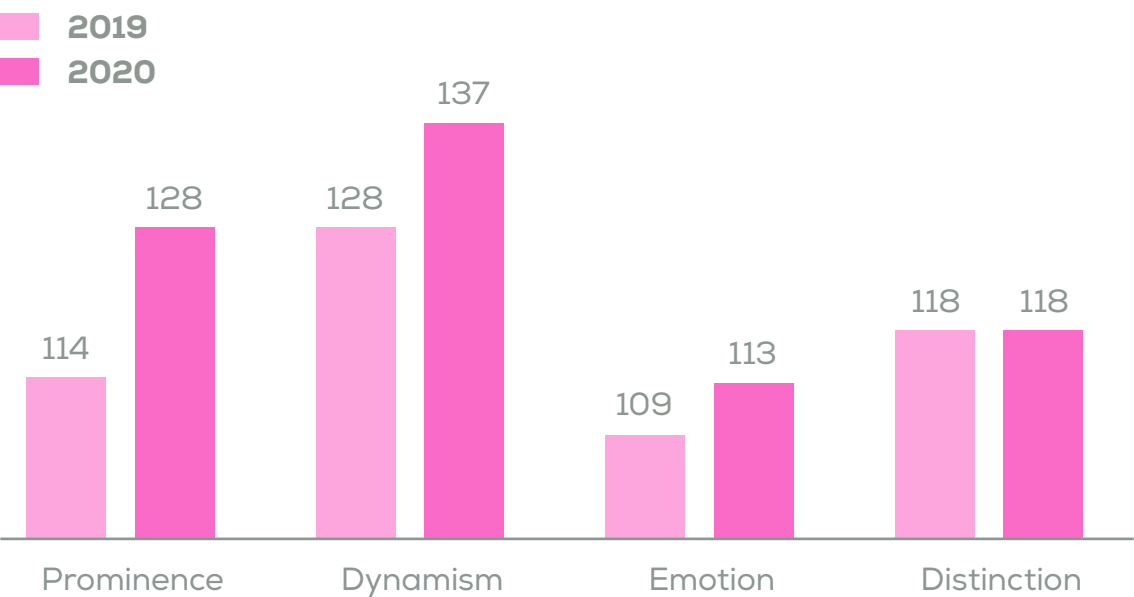


NETFLIX

Baby boomers converted

2020 has proven to be another stellar year for Netflix in the Most Connect Brands Index, as it jumps up to fourth position - a total climb of 26 places in the last two years alone. The brand owes this success to winning over 'Baby Boomers', a generation who had Netflix placed 34th last year, now deeming it worthy of sitting nearly in the top 20 (22nd).

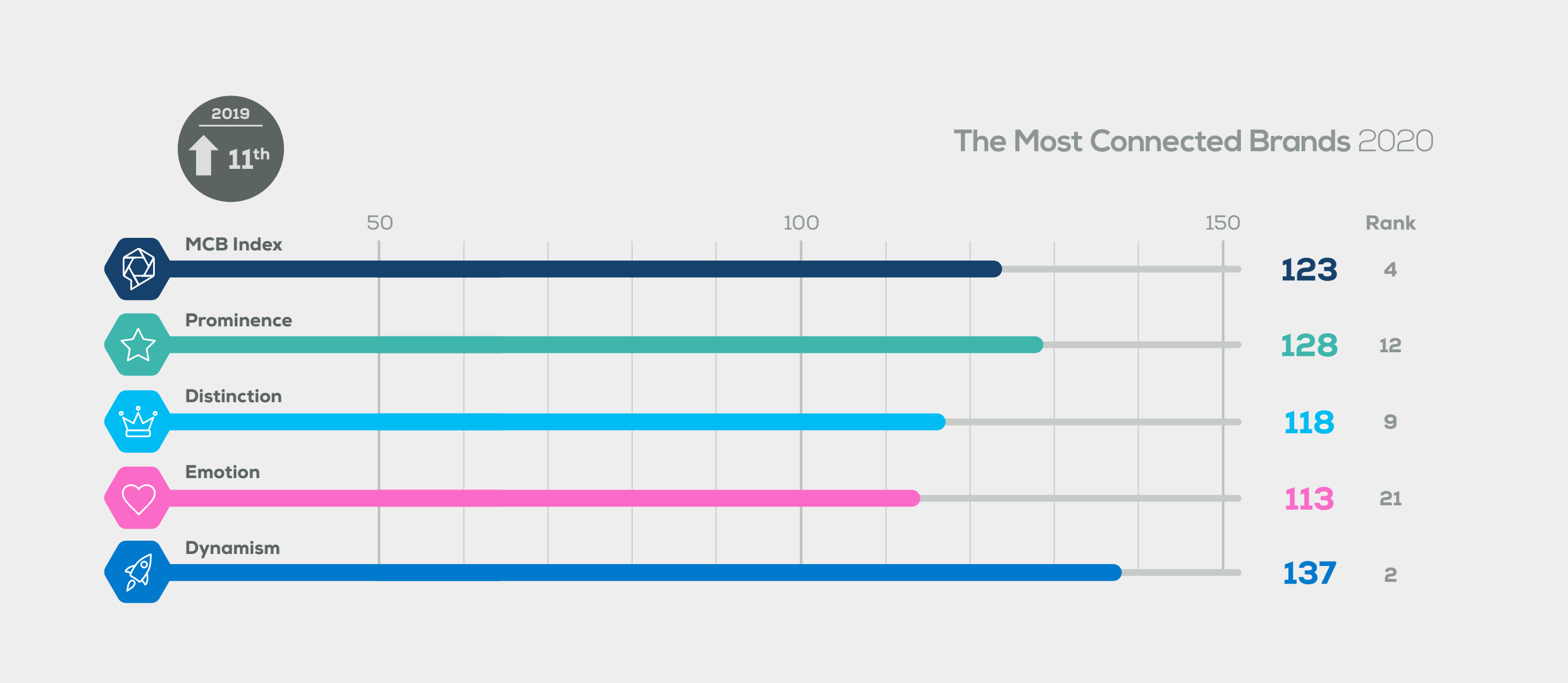
In credit to Netflix, the growth they are achieving has been made through credible gains on three out of four brand drivers:



It is no surprise that Prominence has seen the growth it has over the last year as Netflix continue to invest heavily in making sure consumers know their name. In 2019 alone, Netflix's total media spend grew by a further 28% (to just under GBP£20 million) - meaning that since the start of 2017, they have almost tripled their level of ATL investment - a sure sign of a brand who is committed to driving growth.

Not only do more people know the Netflix name, but they are agreed it is a brand who are 'always looking to push boundaries'. This is the strongest relative perception for Netflix and has seen an increase of five percentage points year-on-year, earning Netflix a 'Top 5' spot on this measure. This is by no means a small feat when looking at others who top this category- the likes of whom have launched the most innovative products and services in the twenty-first century:

'Always pushing the boundaries' Index				
Apple	Dyson	Huawei	Netflix	Google
285	275	259	232	221



4th NETFLIX

Softening this well-established disruptive edge, Netflix continues to hold strong as a 'brand that makes you smile', sitting only behind the likes of Cadbury and Disney and second only to Disney on 'Amusement'. Global mega brands who have literally spent over 100 years perfecting this to an art!

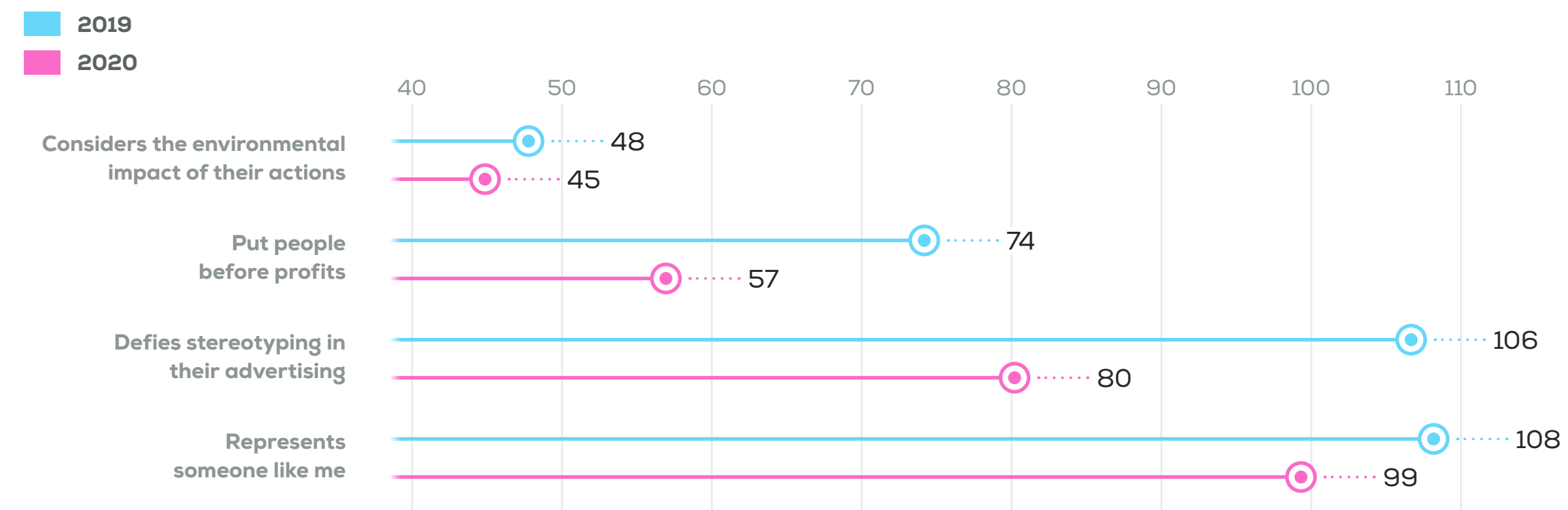
This all raises the question, is there really any stopping Netflix?

Considering the Covid-19 pandemic means that current consumer behaviours are probably more 'Netflix and chill' than ever, it would be natural to think perhaps not.

However, there are signs that Netflix need to ensure they are focussing on a conscious and diverse connection with fans, as the brand continues to grow and disrupt. Currently, Netflix perform relatively poorly across a range of perceptions in this area and have weakened overtime:

Whilst Netflix may therefore be tackling the challenge of winning over a broader audience, it has come with the additional task of ensuring new viewers feel truly welcomed and catered to. If Netflix wants to secure long-term success and even aim for the top spot next year, it must focus on strengthening its emotional connection with consumers.

We will be waiting on our sofas, primed and ready.





CADBURY

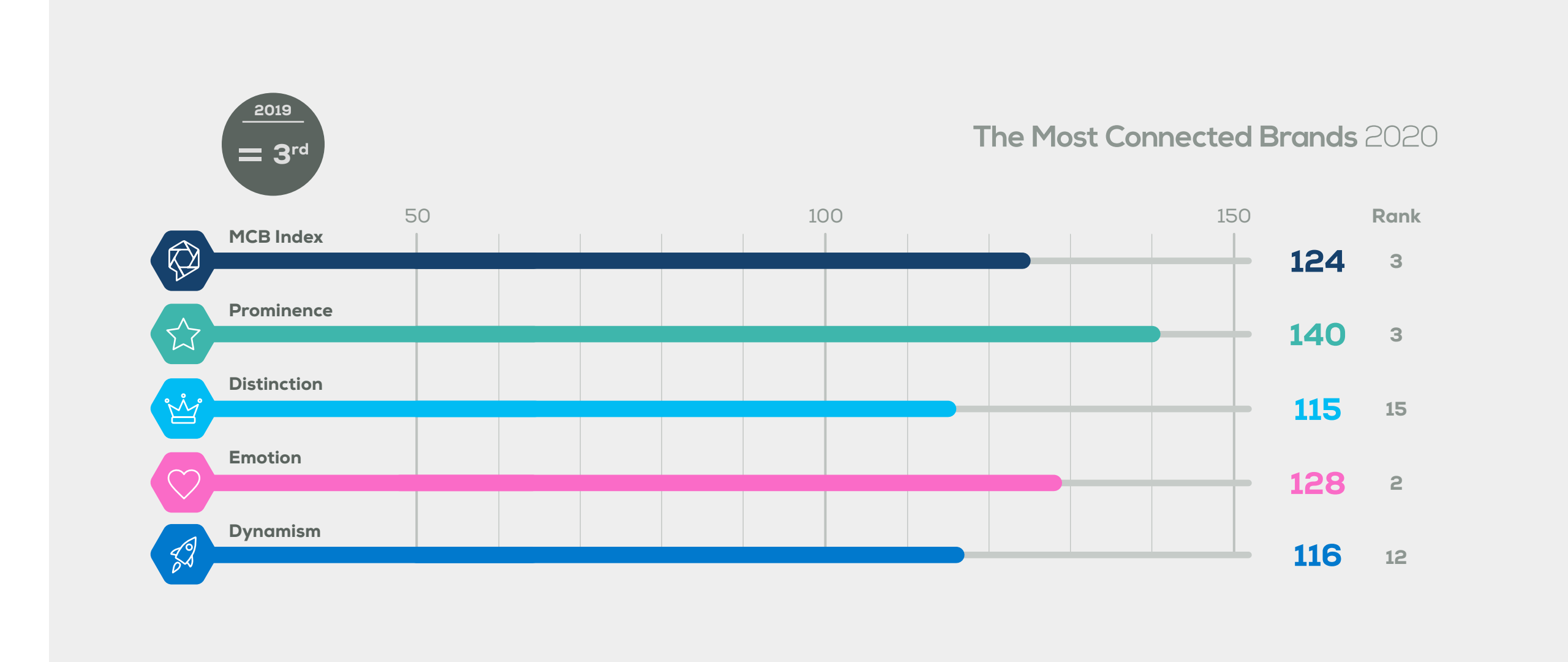
The sweet taste of success

For the second year in a row, Cadbury maintains its spot in the rankings at number three. Not only is Cadbury one of Britain's most well-known brands, it's also one of the nation's oldest – first established in 1824. And although taken over by Mondelez International in 2010, it has managed to retain its British headquarters (and its decidedly British disposition). For nearly 200 years, Cadbury has been inventing, inspiring and investing in a nation of chocolate lovers and its brand is as strong today as it has ever been.

Cadbury's ranking is due to a strong performance in Prominence and Emotion – it is a brand with a big presence and strong emotional ties to sweet-toothed consumers who implicitly associate it with fond memories of treats and pick-me-ups. One of the most loved brands in our Index, Cadbury is also ranked first in the food and drink brand category, ahead of the likes of Walkers, Heinz and Kellogg's, which is impressive in a category that is generally highly connected to consumers.

Not only is Cadbury seen as a brand that 'belongs' and is 'comforting', but consumers agree it's a brand that 'makes you smile'. This is the strongest relative perception for Cadbury and earns it the top spot on this measure, over indexing by 132%. Meanwhile its distinctive purple colour and font means it also ticks another box – being perceived as 'iconic brand' by the public.

While these associations have most definitely contributed to the result, Cadbury's continuous heart-warming advertising has too. Cadbury has stayed at the forefront of consumer minds thanks to a constant stream of memorable marketing efforts that have spanned from their first TV advert in 1955 to the iconic gorilla drumming advert in 2007 and the more recent 'mum's birthday' advert in 2018 when it decided to ditch its 'Free the Joy' tagline in favour of a focus on kindness. With consumers increasingly connecting with brands that have an emotional bond, Cadbury's embrace of a more sentimental theme of generosity in its advertising seems to have hit the spot.



Cadbury's score for social responsibility has stayed roughly the same as 2019 but, compared to the other brands in the top five, it comes second. The brand's 'donate your words' campaign may have helped this when, towards the end of 2019, Cadbury partnered with Age UK to help combat loneliness in older people. The proceeds from the limited-edition Dairy Milk chocolate bar help to fund crucial services and care to those who need it most. Never has the ability to help people feel less lonely been so important than right now during lockdown, especially with the elderly. This has, without a doubt, resonated strongly with consumers, particularly during a time of panic and uncertainty.

So, what does 2020 hold for the chocolate giant?

Well, Cadbury is getting a fresh new look and changing its tone of voice to reinforce the idea of the brand as natural, authentic and high quality with packaging is expected to highlight the brand's commitment to working with sustainable sources through partnerships with cocoa farmers in its Cocoa Life sustainability programme. Whilst this new brand identity

won't arrive in the UK until early next year, it will be interesting to see whether this influences consumers' views of not only the brand's social responsibility, but their overall connection to Cadbury.

Brand expert view

CADBURY

Cadbury are one of the many FMCG brands that are likely to maintain stable sales performance despite the Covid-19 pandemic.

One of the quintessentially British household brands, the brand has undertaken a rapid innovation focus since being bought out by Mondelez some 10 years ago. Almost all of the Cadbury staple brands have received some sort of innovation twist on their portfolios ever since the buyout and, initially it seemed like the brands' communication approach may take a little more time to catch up with this innovative spirit.

However, in the past year or so this has changed.

Whether that be the Age UK 'Lost for Words' partnership, Miniature Heroes' first campaign since 2013 that was boldly a digital-only campaign ahead of last Christmas, or their recent major sponsorship of Tottenham Hotspur as their official

snack partner at their new world class stadium – it is clear that the marketeers who are managing the brands are now taking some much needed risks.

The Tottenham Hotspur announcement came just months after the National Trust partnership was ended after 13 long years. Potentially an admission from the family brand that they were having to rethink how to reach the family demographic; as well as an acknowledgement that the partnership may not now be delivering the kind of cut through that either party were looking for.

This new and fresh risk-taking approach to their communication was clearly intended to highlight the now iconic annual Crème Egg Hunt in March – typically carried out in store as consumers clamber for the rare white Crème Egg.

Last year, the brand took the hunt online and created a brilliantly executed Online Treasure Hunt, ensuring that the

digital native generation could partake in the hunt from their iPads. This year, the unfortunately timed Grandparent hiding the Egg in his garden was pulled amidst the Covid-19 pandemic. Could a bumper 2021 Hunt be on the cards?

For a brand whose in-store presence is unrivalled in the chocolate aisle, it is going to be particularly interesting. The brand's powerful distribution helps to maintain their impressive awareness levels, but without the ability of a usual in-store experience over the coming months, the brand will have to turn to their communications plans to surprise and delight consumers.

The existing families may continue to shop Cadbury; but crucially how will they win the new, younger family? The brand has said themselves that they are keen not to create 'wallpaper' digital marketing, so those agency partners on the Cadbury brand will be crucial for the teams as they look to propel their brilliant chocolate into an entirely new audience.

Tom Stone
Managing Director, re:act



GOOGLE

Narrowing the gap

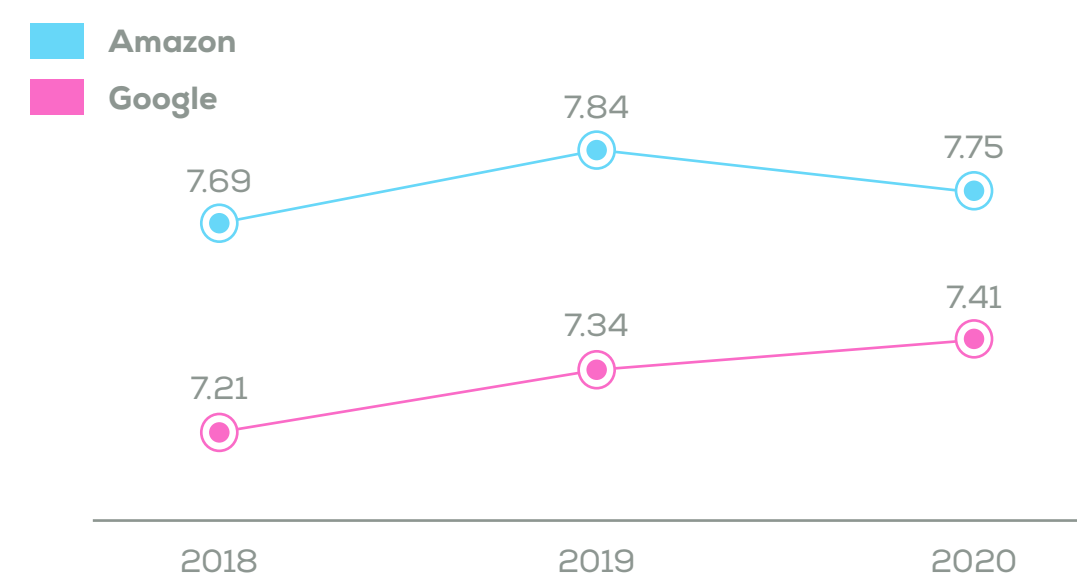
This search engine has become a staple in the lives of the UK and this is reflected in our MCB Index. For a third year in a row, Google ranks second behind Amazon. Although it misses out on the top spot, Google is still thought of highly by UK consumers, and for most it is almost impossible to imagine an internet and a world without it.

As everybody knows, Google's modus operandi is providing a free search engine, and in return it gathers data on its customers whilst generating income through selling advertising space. Google's effectiveness in becoming synonymous with the internet is impressive. It is the first port of call for finding information and many internet journeys start there. It has become so core to internet searches that the most popular searched term in its main rival's search engine Bing, is 'Google'.

Google's overall score has increased steadily over the last three years, closing the gap to first place. This steady increase is a reflection of a brand which continues to push boundaries and doesn't rest on its laurels. In the last year its focus on Google products has kept it top of mind for consumers via its release

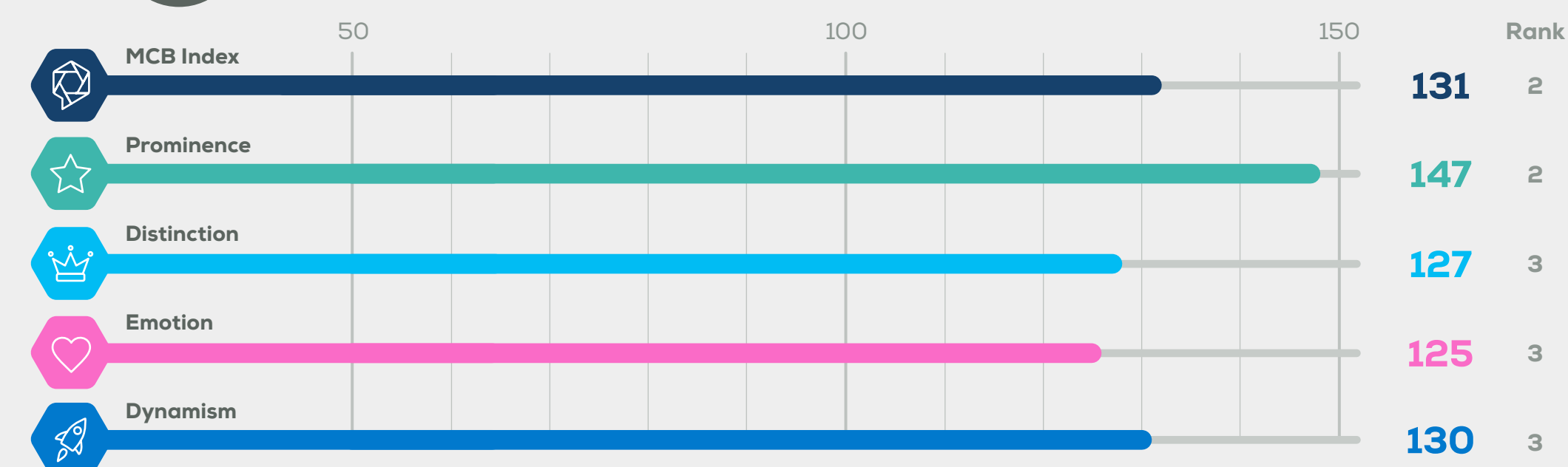
of Google Stadia (a gaming streaming service), investment in Nest home technologies and the release of its latest phone the Pixel 4. These investments show that Google is pushing boundaries in several different areas, ensuring that the UK doesn't just see Google as a search engine, but as a brand which people can physically hold like a phone or interact with like in home technologies.

Overall Most Connected Brand Index



2019
= 2nd

The Most Connected Brands 2020



2nd GOOGLE

This ability to push boundaries combined with its fundamental role the platform plays in our lives are the reasons why Google will always rank highly in our Most Connected Brands Index. Compared to other brands Google ranks fifth overall for a brand which ‘Always looks to push boundaries’, behind Apple, Dyson, Huawei and Amazon and ahead of Netflix and Sky.

A brand which always looks to push boundaries	A brand which you can't live without
1 st Apple	1 st Google
2 nd Dyson	2 nd WhatsApp
3 rd Huawei	3 rd Amazon
4 th Amazon	4 th Tesco
5 th Google	5 th BBC
6 th Netflix	6 th PayPal
7 th Sky	7 th Boots

From Google’s origins as a search engine to facilitate sharing of information, to be listed among these large tech companies shows how proliferate the brand is in expanding to new markets. Even more impressive is Google’s importance to UK adults, it is ranked top for being ‘A brand that you can’t live without’ ahead of WhatsApp and Amazon. This shows just how essential Google is.





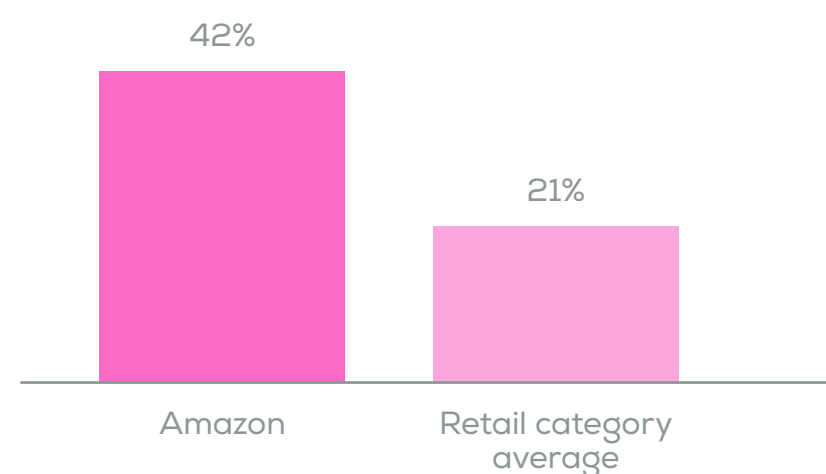
AMAZON

Amazon delivers the goods for a third year in a row

Staying true to its mission to be the world's most customer-centric company, Amazon has secured its place at the top of our Most Connected Brands Index for a third year in a row.

Amazon's success is down to its wholehearted obsession with transforming the customer experience, a pursuit which has taken the brand from being the nation's favourite, to the brand we can no longer live without.

Consumers are twice as likely to call Amazon a brand they 'can't live without' than other retailers



Last year, 70% of UK online consumers said they started their online search on Amazon¹, enriching the brand with a wealth of first party shopping data and turning the attention to a promising revenue stream for the brand, Amazon Advertising. Digital advertising sales were undoubtedly not in the pipeline when the brand first launched its online bookstore back in the 90s, and yet in Q1 of this year Amazon Advertising has been recorded as the fastest growing arm of the business².

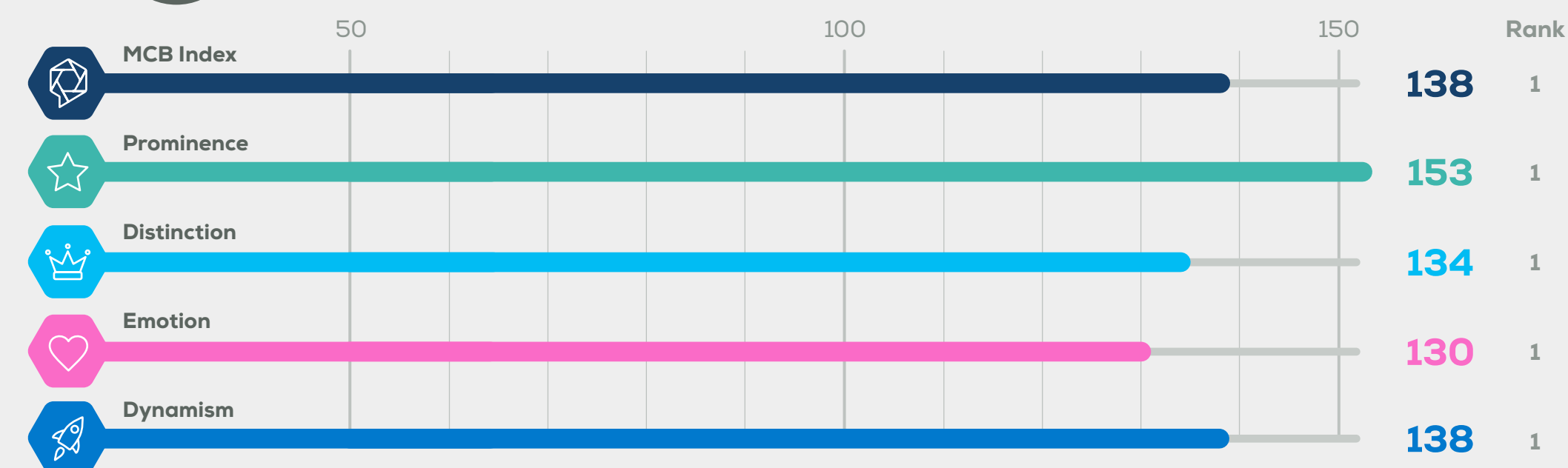
Amazon's advertising is up 44% in Q1, making it Amazon's fastest growing revenue stream³



Sources: ¹ www.mintel.com ² www.ir.aboutamazon.com ³ Amazon

2019
= 1st

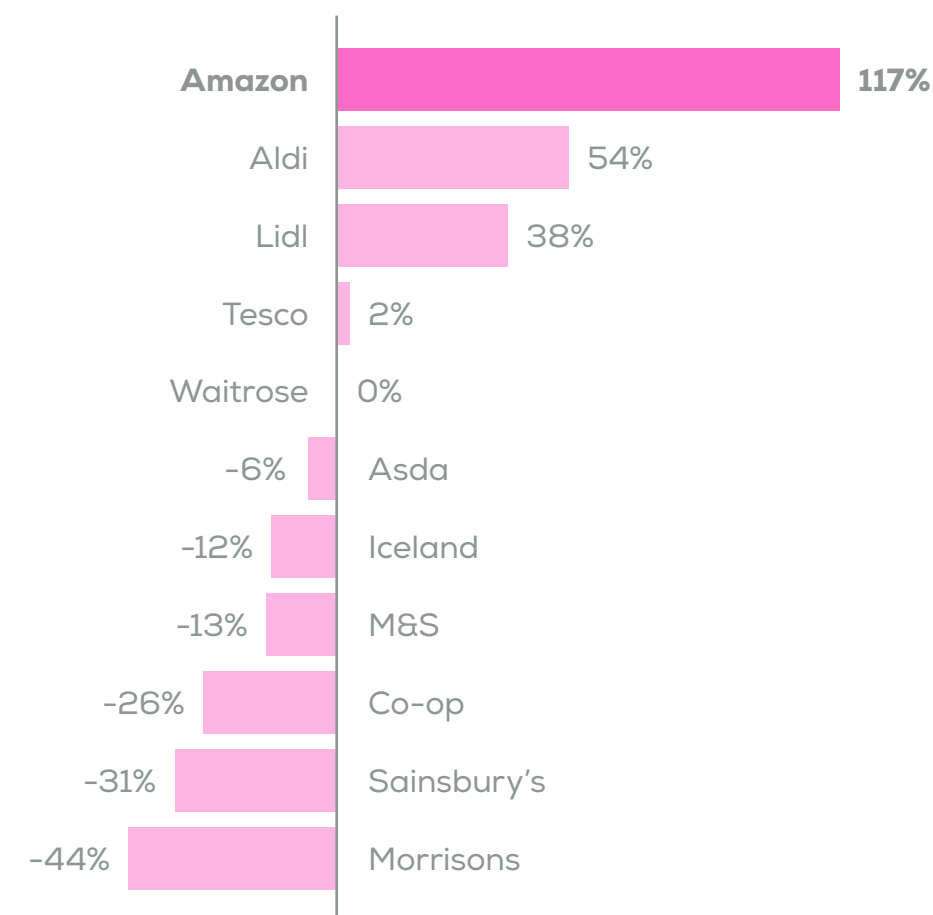
The Most Connected Brands 2020



1st AMAZON

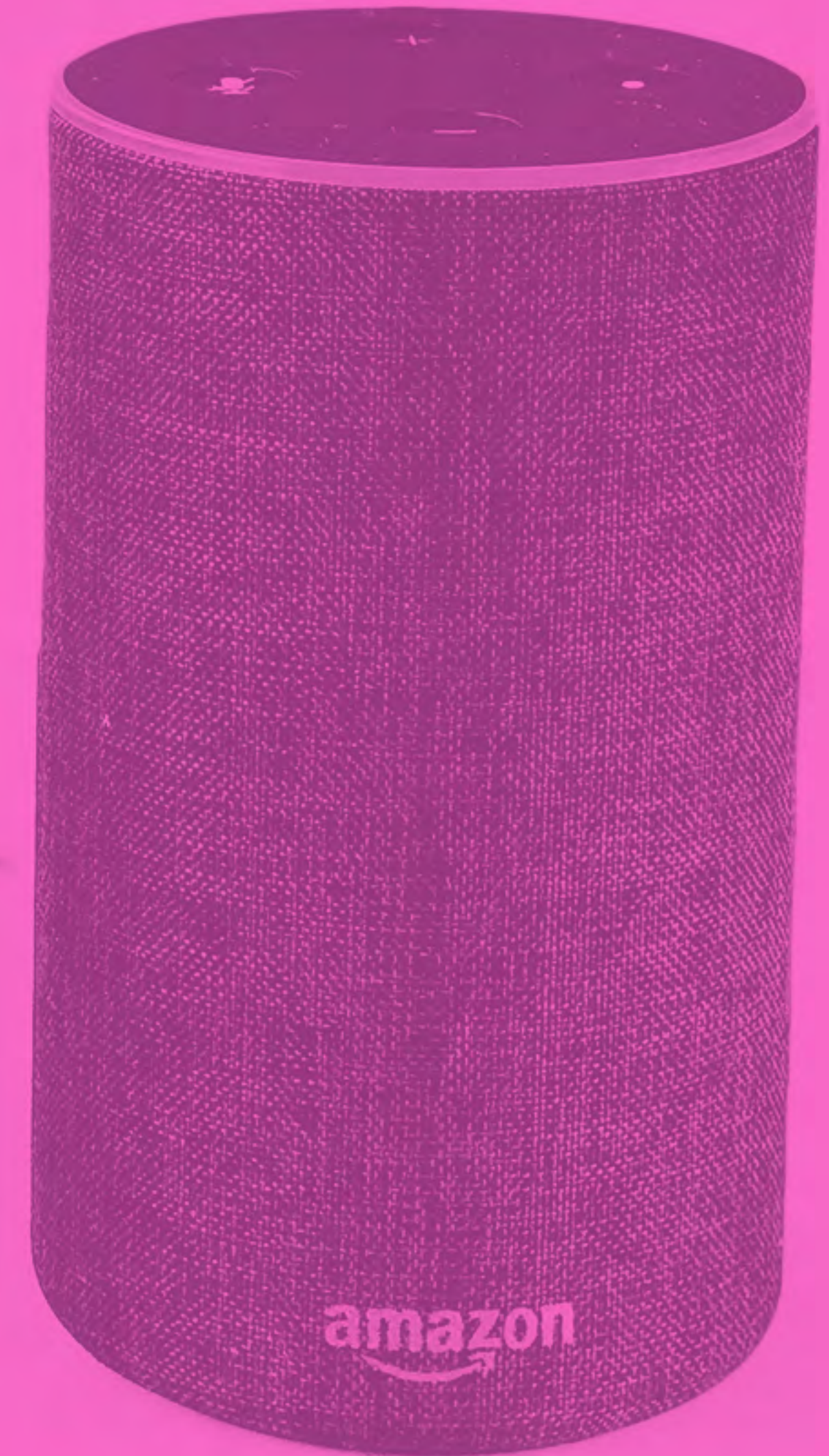
But it's not just Amazon's customer focussed attitude that has kept it at the top of our MCB Index. Amazon's fearlessness to push industry boundaries and enter new markets is what keeps it top of mind. This year, Amazon is set to open its first own branded convenience store in the UK. Concerned that it may not survive in the competitive UK grocery sector, Amazon has already made plans to sell its innovative cashless technology to other supermarkets, in an ingenious move that will ensure it takes a share of the sector regardless of the store's success. If Amazon cannot beat its competitors, it will make them its customers.

Amazon is 117% more likely to be seen to push the boundaries than other brands in the grocery sector



Social Responsibility is Amazon's lowest score in our MCB Index for a third year, falling below average for the first time in the series. This indicates that, despite efforts to appear to be acting to benefit wider society, perceptions of the brand as having poor ethical standards have not yet been shifted.

However, things could finally be changing for the better. Since the recent outbreak of Coronavirus and as Amazon reported making USD\$11,000 a second as a result, pressure mounted from the public for Amazon to provide better treatment of its employees, an issue that has been under the spotlight long before the pandemic. Not wanting to be remembered as the brand that didn't support key workers, a group now becoming known as heroes in the UK, Amazon has accelerated its response to pressures, including providing its London warehouse staff and delivery drivers with a GBP£2-an-hour pay rise. If this type of behaviour continues for the rest of the year, Amazon might have a chance at being at the top of all our Most Connected metrics in 2021.



Brand expert view

AMAZON

Amazon has grown dramatically since it was founded in 1994, and the past 12 months have been no different. Continuing its march to global dominance, half of all product searches in the US start on Amazon, 150 million people subscribe to Prime, 7 in 10 smart assistant devices in the US are the Amazon Echo, and AWS is the market leader for cloud computing. Amazon has embedded itself into the daily lives of its customers to the point of being almost essential.

There are two fundamentals to Amazon's growth and success: a relentless focus on the customer, and an entrepreneurial spirit. This comes through in what it's famous for, convenience and fulfilment. It knows no one can beat its ability to find, buy and deliver quickly and simply. The Amazon brand embodies this in every aspect of its products, services, and marketing.

Of course, with immense growth comes immense scrutiny. Amazon is a set of very powerful commerce-related systems, holding huge influence over sellers, competitors and customers.

This has brought the attention of anti-trust investigations in the US and Europe, for AWS as well as its marketplace.

Customers are starting to question the quality and transparency of marketplace products. Amazon knows this, and its various campaigns in the last year have been crucial in addressing – and assuaging – these concerns.

Pop-up 'clicks & mortar' stores appeared in the UK, shining a light on small businesses and putting weight behind Amazon's support for 'the little guy'. TV ads of singing boxes in the back of a cheerful delivery driver's van showcasing their happy staff. 'Toys for Tots' allowed generous customers to use their Alexa-powered devices to donate toys to children in need, using Amazon products for good.

All was well. And then the global pandemic hit.

While the world shut down, Amazon was the Everything Store millions turned to. At the outset, it struggled to meet demand as products sold out. It faced issues in its fulfilment centres and questions around its ability to adhere to social distancing. It cut 4,000 seller accounts and 500,000 products for price hiking.

But it was still essential. So, it has bounced back. In April it hired an eye-watering 175,000 temporary workers to help meet demand, and the recruitment drive took over TV ad breaks. It later confirmed that 125,000 would be made permanent – even under intense scrutiny, Amazon continue to make strategic decisions that resonate with consumers.

Looking ahead, Amazon will continue to expand and diversify. Its risk-reward culture has made AWS a huge commercial success, and with Prime, Echo, Ring and Twitch, it has taken on content, consumer technology, security and gaming. Amazon has already moved into people's homes; will we be prepared to welcome the brand into even more of our lives? Amazon certainly believes it knows the answer to that.

Its power and influence will need careful management, and it is sure to face many more unforeseen hurdles. But if the last 30 years of success, innovation and entrepreneurship are anything to go by, Amazon will continue to smile from A to Z.

Giles Peddy
SVP EMEA, LEWIS Communications



Our expert views

Seven key trends

Key trend 1

Brand purpose

Future-proofing brand purpose

Jake Webster, Communications Strategist, VCCP Media

In Ancient Athens, orators ruled the roost. These men were acclaimed across the world for their eloquence and persuasiveness – making a tidy living renting themselves out for the highest bidder.

Socrates took exception to this. He argued that rhetoric was an amoral endeavour, as while you can use oratory for justice, you can also use it to accomplish unjust means. Anyone can learn the knack of persuasiveness, but it is harder to learn what is 'right' – you can't learn this from speeches, you have to deliberate and come to your own conclusion. Without morality, rhetoric remains empty and easily forgotten.

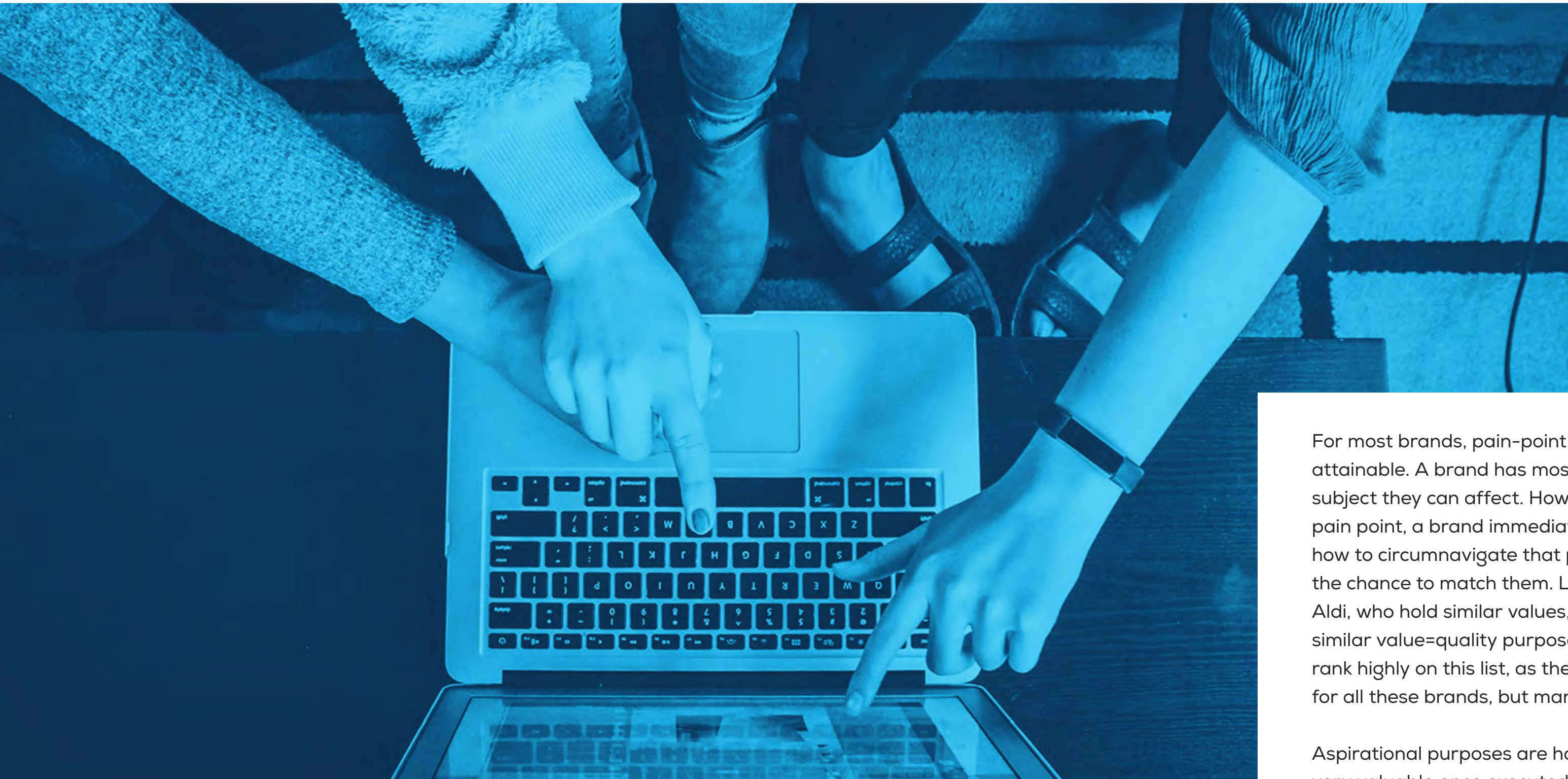
As marketers, our currency is persuasiveness. Advertising has long been a hugely effective and essential tool. In more recent years, as we have digitised and globalised, we have seen the rise of the influencer, the modern-day orator, offering access to their followers, through them, for a price.

Consumers are increasingly savvy to advertisers' tactics. The very ubiquity of communications that results from all our marketing is to its very detriment – we know when we are being sold to. As a result, it can sometimes be difficult for brands to establish that lasting connection with their consumers. Successful brands all take the advice of Socrates and focus on a core purpose across both their marketing and their business as a whole.

Broadly, brands can use purpose in their marketing in three separate ways. Some use it to address a pain point – such as Lidl, who challenge cheapness being synonymous with low quality, by consistently delivering a quality offering at a reasonable cost. Others use it to appear aspirational – Apple perpetuate an expectation that consumers who buy and use their products are likewise creative and innovative. Finally, others use it to align themselves to a moral principle – Cadbury have recently returned to their roots, focusing on generosity. ▶

“Consumers are increasingly savvy to advertisers' tactics. The very ubiquity of communications that results from all our marketing is to its very detriment – we know when we are being sold to.”

Key trend 1: Future-proofing brand purpose



For most brands, pain-point purposes are often the most attainable. A brand has most authority to talk about a subject they can affect. However, by identifying and solving a pain point, a brand immediately indicates to its competitors how to circumnavigate that problem. This gives competitors the chance to match them. Lidl has to share its market with Aldi, who hold similar values, and Tesco, who also have a similar value=quality purpose. All three of these competitors rank highly on this list, as the grocery market is large enough for all these brands, but many other markets aren't so lucky.

Aspirational purposes are hard to cultivate but can be very valuable once executed. If well executed, conversation and speculation about your brand will occur naturally, freeing up the marketing budget for long-term projects. However, it is very hard to be simultaneously aspirational and mainstream. Brands who rely on aspiration rely on exclusivity, whether through pricing, novelty or availability. Also, all it takes is one misstep or key personnel departure, and a carefully cultivated image can take a massive hit

overnight. While Apple are perhaps the best insured brand against this, it remains to be seen what the long-term effects of the departure of Jonny Ive will be for their image. Aspirational purposes will remain strong if you can get them right – but can ultimately be very brittle.

Morally-purposed brands, while rarer, are on the rise. The downside of using a moral purpose for your brand is that it aggravates anyone who disagrees with it. In an increasingly globalised world, where values across cultures differ, finding a purpose that is defined and also is not alienating is even more difficult. Often, more controversial purposes, such as Nike supporting Colin Kaepernick, can actually be most rewarding. Any lost consumers were more than compensated for with controversy-driven PR and the swell in support from their more progressive urban target market. The key factor in the success of moral purposes is ensuring a brand backs up words with actions. This will ensure that it has the most robust connection with its consumers, putting a brand in the strongest long-term position.

Key trend 2

Brand experience

Why brand experience is the future of financial connectivity

David McCann, Group Planning Director, Teamspirit

This unprecedented global pandemic has cost us all more than money. It has impacted loved ones, whole families, communities and changed our everyday lives.

As we start our journey to recovery, it's encouraging to see how far the financial sector has come. Just over a decade ago, the banking sector in particular was seen as the perpetrator of the last global crisis, and with it came loathing and customer contempt. Today, as the data shows, things are evolving; it's heartening to see the progress that financial brands are achieving in creating better connections with their customers and society.

However, even as global governments position banks as the engines of recovery, the scarcity of financial brands in the list clearly demonstrates that the sector still needs to improve. So, what's missing? For us, it's a lack of a connected brand experience strategy. When we talk about brand experience (BX), it's about how people experience the brand, not just how

its customers interact with the business (CX). It's about how a brand clearly projects its values, reaffirms its reputation and follows through to provide people with a compelling reason to try, repeat their usage and then tell others.

Today, most of us deal with our finances daily online, via a mobile or wearable device, but it still feels more functional than fulfilling. That's because financial institutions often put their focus on legal obligations and regulatory requirements, and adopt a risk mitigation mindset, rather than an experience first ethos. This means the efficiency of a transaction and its security is given more importance than the overall experience. A prime example of this is being forced to tick receipt of a fraud announcement that seemingly protects the bank more than the customer before being allowed to access your own online account. ▶



Key trend 2: Why brand experience is the future of financial connectivity

“The financial brands that have made it onto the list do so because they are united around a brand experience that aligns marketing resources, operational capabilities and organisational values to provide emotional and practical connections for people.”

In a sector where products and services are commoditised, and innovations are short-lived, the financial brands that have made it onto the list do so because they are united around a brand experience that aligns marketing resources, operational capabilities and organisational values to provide emotional and practical connections for people.

Over the past weeks and months, we've seen how brands have been offering pragmatic support, lowering interest rates, providing debt repayment holidays, or postponing shareholder dividends to protect customers. Some have gone further. Admiral, the UK general insurance firm, who did not make the Top 100 in the MCB list, returned £25 to every eligible motor customer who, due to lockdown, was unable to use their vehicle. Others like Nationwide (63rd) have used the power of communications to enhance their reputation, using their TV budget to connect through heartfelt odes where people share the common experience of lockdown and provide optimism for the future.

Other brands like Lloyds (86th) have worked with Mental Health UK to create a partnership that shows that they not only understand the link between money worries and mental wellbeing but want to support customers beyond

just financial transactions. This is an initiative that's wholly in keeping with its stature as the UK's largest bank account provider and clearly amplifies its brand values.

The internal silos, legacy infrastructure and an uninspiring compliance attitude obviously hasn't been the case for the neobanks and disruptive insurtech brands, such as Monzo and Starling, which I'm sure will make the Top 100 in the MCB list in the next few years as they continue to win customers by providing imaginative ways to engage, educate and excite, and focus their efforts on providing a unified experience that matches expectations.

Our belief is that for financial brands – whether old or neo – the pandemic could become a catalyst for them to build or rebuild trust, better connect with customers and increase their number on next year's list. To do so, they need a strategy that unites their brand values, projects their personality, builds a reputation as an empathetic partner and uses technology to seamlessly marshal the customer's financial resources to protect and delight, and deliver the best outcome for them. This is no small challenge, but it will be an experience worth waiting for.

Key trend 3

Diversity in advertising

The art of being self-aware and giving a damn

Ande Milinyte, Senior Researcher, Opinium

Diversity. A powerful and sometimes paralysing word, one that is both heralded and feared by people in advertising. To a lot of us, it seems like such a straightforward, obvious thing to do – but it's one that has gone wrong so, so many times. Often, diversity is feared to such an extent that it leads to inaction – but when action does happen, it's often through stereotyping or tokenism.

But we are in the year 2020. The year that has already shaken the world with a global pandemic and massive protests for Black Lives Matter, highlighting the challenges of an ever-growing population that is still shackled by systemic errors and injustices.

As the Black Lives Matter movement is met with (mostly) unity and a promise to do better, how can brands do their bit now and in the future?

It's not a question of what brands should do first to become more diverse – it's a question of why they're not doing it all yet. In 2020, diversity should be a hygiene factor.

First, there's the internal systems, those that are not visible to the consumer's eye. Do they have diversity when it comes to their management and employees? And no, 'diversity of thought' doesn't count. Have they set targets for supporting diversity? Have they implemented unconscious bias training?

And then there's the one that goes straight to the consumer – advertising. Diversity in advertising, by its very definition, isn't just about one thing – it's not just about gender, age, race, sexual identity, disability or ethnicity. It's about all of those factors – and much more. ▶

"Most people ignore advertising because advertising ignores most people"

Bob Levenson,
DDB Advertising Director

Top 10 brands that cater to diverse groups of people

- | | |
|----------------------|--------------------|
| 1. FACEBOOK | 6. VODAFONE |
| 2. AMAZON | 7. TK MAXX |
| 3. EBAY | 8. BBC |
| 4. DELIVEROO | 9. GOOGLE |
| 5. MCDONALD'S | 10. YOUTUBE |

Key trend 3: Diversity in advertising: The art of being self-aware and giving a damn

Don't get me wrong – diversity in advertising does exist. But visible presence is not enough – just because you have diverse groups of people in your advertising, doesn't mean you are being representative or inclusive. Or non-discriminatory, for that matter.

No one wants to be Volkswagen right now. In May 2020, Volkswagen had to apologise for their new car ad that – in hindsight – they have admitted was 'inappropriate and tasteless'. The now-withdrawn ad showed a pair of giant white hands flicking a black man into a café called "Petit Colon" – French for 'little colonist'.

Yep, they really aired that – and only realised their 'mistake' when it was pointed out to them by shocked and outraged consumers. An internal investigation within VW revealed that while there was no 'racist intent' among their staff, there was a lack of "intercultural sensitivity" and diversity within their marketing department, hence why the racist connotations were not detected before the video aired.

But there are brands out there that are already doing diversity well – and they're doing it by bringing self-awareness to the table.

In 2018, Google carried out a deep-dive into the quantity and quality of diversity in their marketing campaigns. To be

objective, they asked the Geena Davis Institute on Gender in Media, a non-profit that researches gender representation in media to analyse race, gender and socioeconomic diversity in their advertising.

What they discovered was lots of racial diversity – but not enough socioeconomic diversity. "Everyone looked like they worked in tech and lived in hip, urban neighbourhoods", Google's chief marketer Lorraine Twohill noted. However, gender representation was also amiss: "My team brought me a new campaign to review. Dad was cooking in the kitchen. Great! I was proud that they had flipped a stereotype. But the next image showed he was there because mom was in the hospital having a baby. Sorry, dad, but we had to reshoot. Mom was away because she was on a business trip."

Aware of their lack of representation, Google launched a training course to tackle diversity in its campaigns, and by June 2018, 90% of the company and 200 of its agency partners had completed the course.

At the end of the day, diversity in advertising is not difficult to achieve. All we need to do is be aware, empathise, and speak up. And that's a hell of a lot easier to do if you have diverse people in your team to call you out on it, and an environment in which calling out inequality is not just acceptable, but encouraged.

"It's not a question of what brands should do first to become more diverse – it's a question of why they're not doing it all yet.
In 2020, diversity should be a hygiene factor."

Luxury

What happens when the world redefines what it means?

Emily Dickinson, Director, Opinion

Luxury. For years researchers, marketers and brands have argued over its definition. A proliferation of webinars, workshops and articles have told us that luxury is intangible; that it can only be described as a feeling, an experience or an outcome.

The Merriam-Webster dictionary, however, disagrees.

Flying in the face of controversy, the dictionary offers the following three classifications of luxury as: “a condition or situation of great comfort, ease and wealth; something that is expensive and not necessary; something that is helpful or welcome and that is not usually or always available”.

Semantics? Perhaps. But these three definitions arguably offer a lens through which to view not only consumers changing perceptions of luxury, but also value, in a post-Covid world.

At the time of writing, small freedoms have been transformed by the rarity of their occurrence. Dinner at a restaurant, meeting friends inside a building, having face-to-face conversations, these were not and arguably still should not, be considered luxuries according to Merriam-Webster’s first two definitions. Yet their lack of availability attributes value to these once commonplace means of connection.

To put it simply, we want what we can’t have; what we’re told we shouldn’t have.

This sense of restriction is made all the harder because almost everyone has not only experienced, but also has recent memories of such small freedoms. Whilst we therefore attribute a heightened sense of value to these personal, human interactions, it’s difficult to see them (yet) as aspirational, as unnecessary, or as a condition of wealth. ▶



Key trend 4: What happens when the world redefines luxury?

In a lockdown-ed world, however, it is not just the lure of the unattainable which transforms the everyday into a luxury, rather it is the break with the everyday that this provides.

The much touted 'lipstick effect' – the theory that consumers will still spend money on small indulgences or little luxuries during recessions testifies to this phenomenon. History has shown how sales of 'cheap thrills' – from takeaway coffee to expensive soap – can surge in a downturn as consumers avoid big ticket items and seek relief in small moments of escapism.

Although sales of lipsticks will, no doubt, continue to thrive over the next few months, it is possible to claim that the pandemic has imposed another new definition of luxury upon us: one which is people-driven, rather than simply product-led. One in which access is granted not by the wealth of the few, but by the health of the many. And one, which with perhaps the exception of Dominic Cummings, is universally applied to all.

Make no mistake, Covid-19 is no great leveller, the pandemic has exacerbated and accelerated inequality across the UK but the resulting societal restrictions it has imposed may have created a new form of luxury based on the value of fleeting moments of human connection. Whether this continues once the lockdown has lifted remains to be seen, but regardless of sector, product or service, brands and businesses will need to think more carefully about the ways people want to connect to one another and to them.

“Make no mistake, Covid-19 is no great leveller, the pandemic has exacerbated and accelerated inequality across the UK but the resulting societal restrictions it has imposed may have created a new form of luxury based on the value of fleeting moments of human connection.”

Key trend 5

Technology

Building connection whilst we're apart

Jack Tadman, Research Manager, Opinium

Over the last 3 months, our lives have undergone a massive digitalisation, and fast.

Our physical world was narrowed to a couple of trips a day to the local supermarket or, if lucky enough, a green space. Trapped as we were within our new confines, we became digital animals, on the hunt for connection, entertainment and meaning.

In order to connect, we turned to digital communications with friends and family. The eternal certainty of the automatic 'watch next episode' became our chance to escape our homes and meaning came in the form of remote working, upskilling and other online pursuits.

Our rapid and complete adoption of digital technology further entrenched the role of our big tech giants in everyday life, as well as fully establishing players such as Netflix, which is now valued higher than ExxonMobil and sits fourth in our overall index.

Yet when you look at the brands most associated with tech in our Top 10, all of them under perform in Emotion in comparison to their overall score.

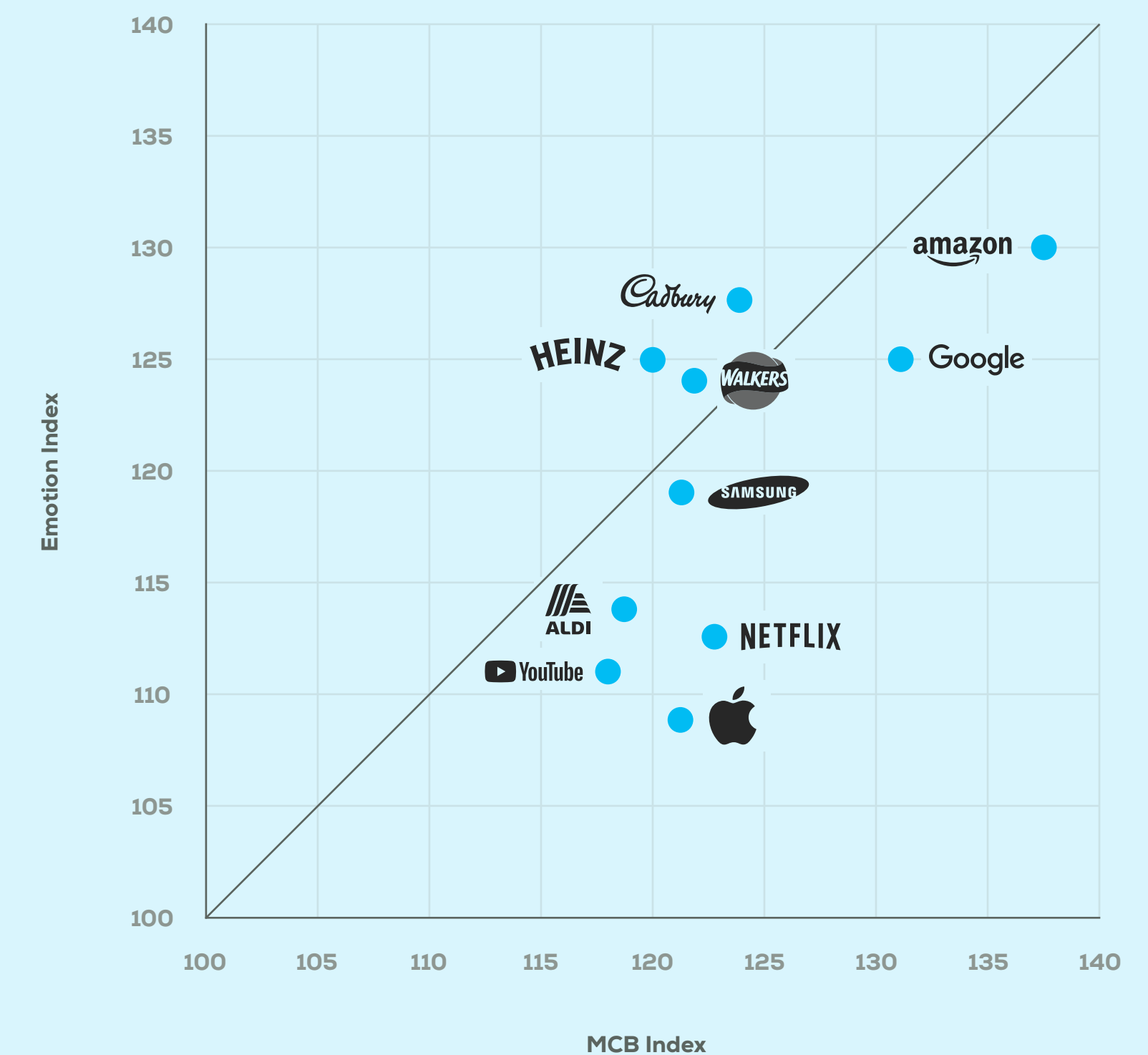
And so here, seemingly, lies tech brands challenge, how do you convert a brand with great utility into a brand that is loved?

Well if there was going to be a time to find out, life post-lockdown is surely it.

As countries around the world begin to look towards the tricky task of extricating themselves from the web of lockdown rules, people will begin to reflect and assess which parts of our new digital lives they'll want to take into the outside world.

It's not just our deepening integration of technology into our personal lives either, Google and Apple, who have pioneered the world's only decentralised contact tracing system that works across both iOS and Android, are set to become key players in the UK's emergence from lockdown. ▶

Top 10 Most Connected Brands



Key trend 5: Tech – building connection whilst we're apart

"Instead of asking, 'Is there a reason to do this online?' we'll be asking, 'Is there any good reason to do this in person?'—and we might need to be reminded and convinced that there is."

Deborah Tannen,
Professor of Linguistics at Georgetown

This reliance on technology – to both enjoy and escape our houses – will undoubtedly impact consumer perceptions and trust, especially if delivered in a way that fosters a new sense of community and respects individual privacy. We are truly at a watershed moment where it may become acceptable for consumers to increasingly trust technology brands with both our online and physical lives.

However, as we increasingly live in glass houses, it's worth remembering that our relationship with our data is still fragile.

Whether Google and Apple hold firm to deliver a public good with truly anonymised data and with high enough levels of adoption will be the lynchpin of success.

The classic 'no such thing as a free lunch' is also true here. Technology doesn't come without a cost, whether this be the working conditions of those creating and maintaining the products and services we use, or the ability for all parts of society to reap the rewards of our brave new world.

I posed the question can tech brands build their emotional connection, well maybe that's the wrong question, maybe they don't need to.

Ever increasing ubiquity is likely to be enough to keep tech brands happy, as they continue to become intertwined with our lives, maybe all they need to do in the eyes on consumers is be a safe pair of hands.



Key trend 6

Family

The power of family. Sharing is caring.

Adam Wilson, Associate Director, Opinium

We've seen above in trend 5 the rise of tech to keep us connected. This has become hugely important for everyone, whether for social or work purposes. But it has become especially important for families. Skype, Facetime and the formerly little-known Zoom are keeping families connected at a volume we've never seen before. This has led to an increase in family influencer dynamics. Millennials, those in their mid-20 to 40s, are even more likely to be impacting the brand awareness and usage of their parents' generation.

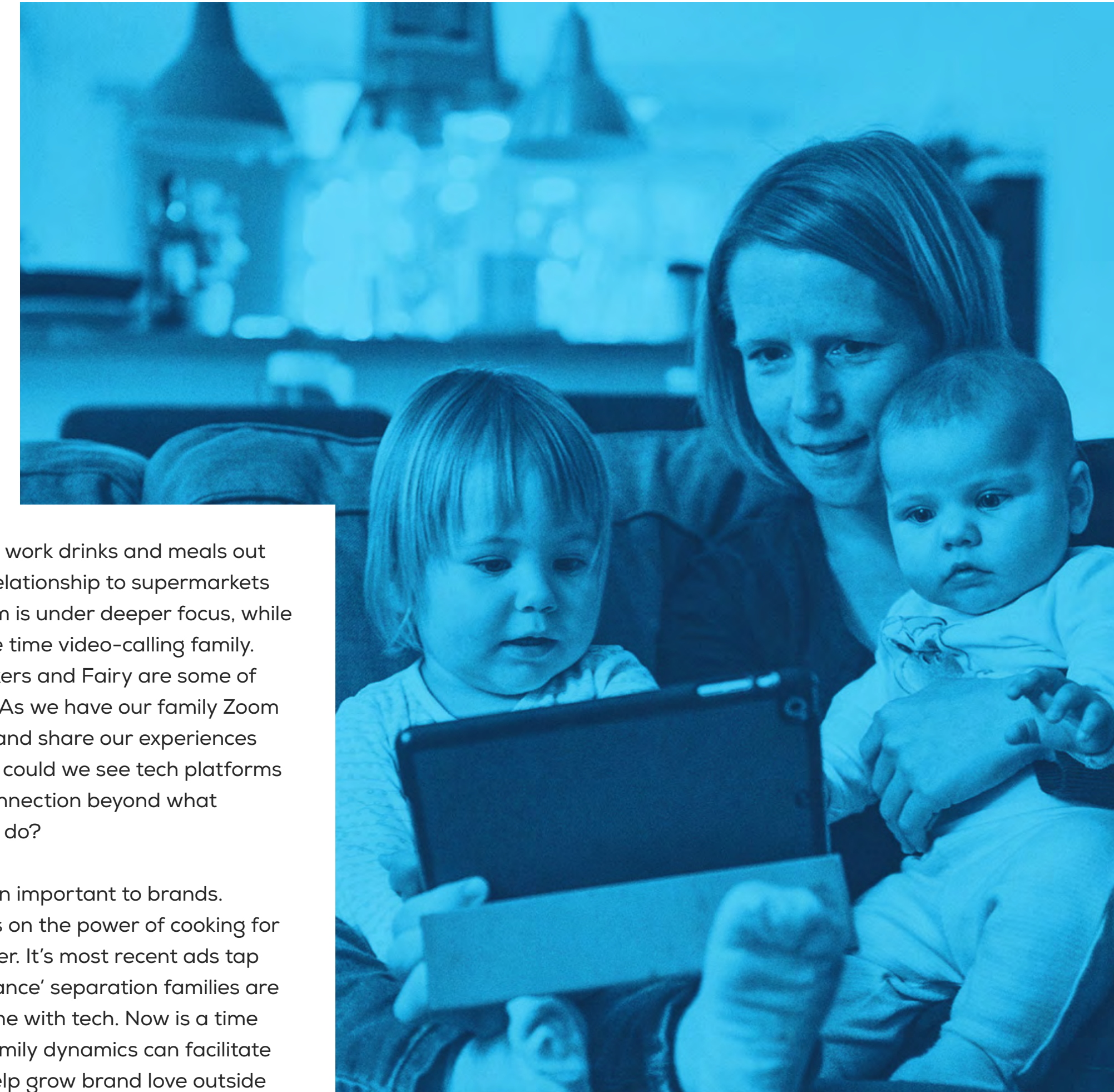
Even before lockdown it seemed almost everyone was in a family WhatsApp group. Being joined to your partner's family WhatsApp group is almost as significant a life moment as moving in together or getting a joint bank account. WhatsApp is now ubiquitous, allowing as it does easy messaging, video calls and the ability to quickly send pictures. Keeping grandma and grandpa updated with how the kids are doing under lockdown has never been easier.

WhatsApp's simple functionality has allowed it to be easily taken up and used across generations, starting with younger early adopters and spreading out to dominate the market. This pattern is being repeated across other tech brands. Netflix continues to rise up our rankings, driven primarily by younger people. Like Spotify and many other subscription services, it allows accounts to be shared with friends and family. Increased demand for entertainment under lockdown, increasing sharing of the content we're enjoying and ease of use makes it simple for other, often older family members, to use these services and become both brand aware and in time, advocates.

But is sharing working both ways? Arguably older generations have already passed on what they value from brands as they raise their children over the long term. But amid lockdown there has been a huge growth in home cooking, more planned shopping and less top-up shops. As much of the working population now does so from home, people are making their

own lunches and foregoing after work drinks and meals out for homemade favourites. Our relationship to supermarkets and the food brands we buy from is under deeper focus, while at the same time we spend more time video-calling family. The likes of Heinz, Cadbury, Walkers and Fairy are some of the top brands for older people. As we have our family Zoom calls and WhatsApp exchanges and share our experiences of supermarkets and foodstuffs, could we see tech platforms facilitate a rise in retail brand connection beyond what lockdown is already forcing us to do?

Family connection has often been important to brands. Tesco's 'food love stories' centres on the power of cooking for family and sharing meals together. It's most recent ads tap into the 'isolation' and 'long-distance' separation families are feeling, but are trying to overcome with tech. Now is a time for brands to think about how family dynamics can facilitate intergenerational sharing and help grow brand love outside of core audiences.



Key trend 7

Mental health

Flattening the mental health curve

Tom Savigar, Founder of Avansere AS

At the dawn of a new decade, health is now an everyday preoccupation beyond anything we have seen. Humans are concluding that they cannot rely on existing health structures but, nonetheless, want all the help they can get, in every aspect of their lives.

In the last few years, human health has been front of leaders' minds when they choose a direction for their brand. Without a conscious commitment to advancing the health of internal and external audiences up and down the value chain, there will be no return on investment. A fulfilled consumer equals greater brand love and spend; a fulfilled workforce equals higher productivity and profit; a fulfilled citizen equals more votes and loyalty.

The betterment model

From brand purposes that promote the systemic enhanced of the human condition; to business models that create value in ways that do not degenerate the condition of society; to profitability calculations that take into account the full range negative and positive impacts on human health – Covid-19 is the catalyst (visionary) brands have been waiting for.

Indeed, 2020 has brought an avalanche of consciousness and confrontation for many humans, and the aftershocks are starting to become apparent, especially when it comes to mental health. According to Unwind, since Covid-19 started UK businesses have been inundated with employees experiencing mental health problems. ▶



Key trend 7: Flattening the mental health curve

Almost four out of five UK businesses have experienced an increase in requests for mental health support from employees as a result of the COVID-19 pandemic; and 90% of UK businesses have increased their emphasis on the importance of employee mental health as a result of the pandemic.

So what can brands do to help people deal with mental stress, and flatten the mental health curve?

Be positive.

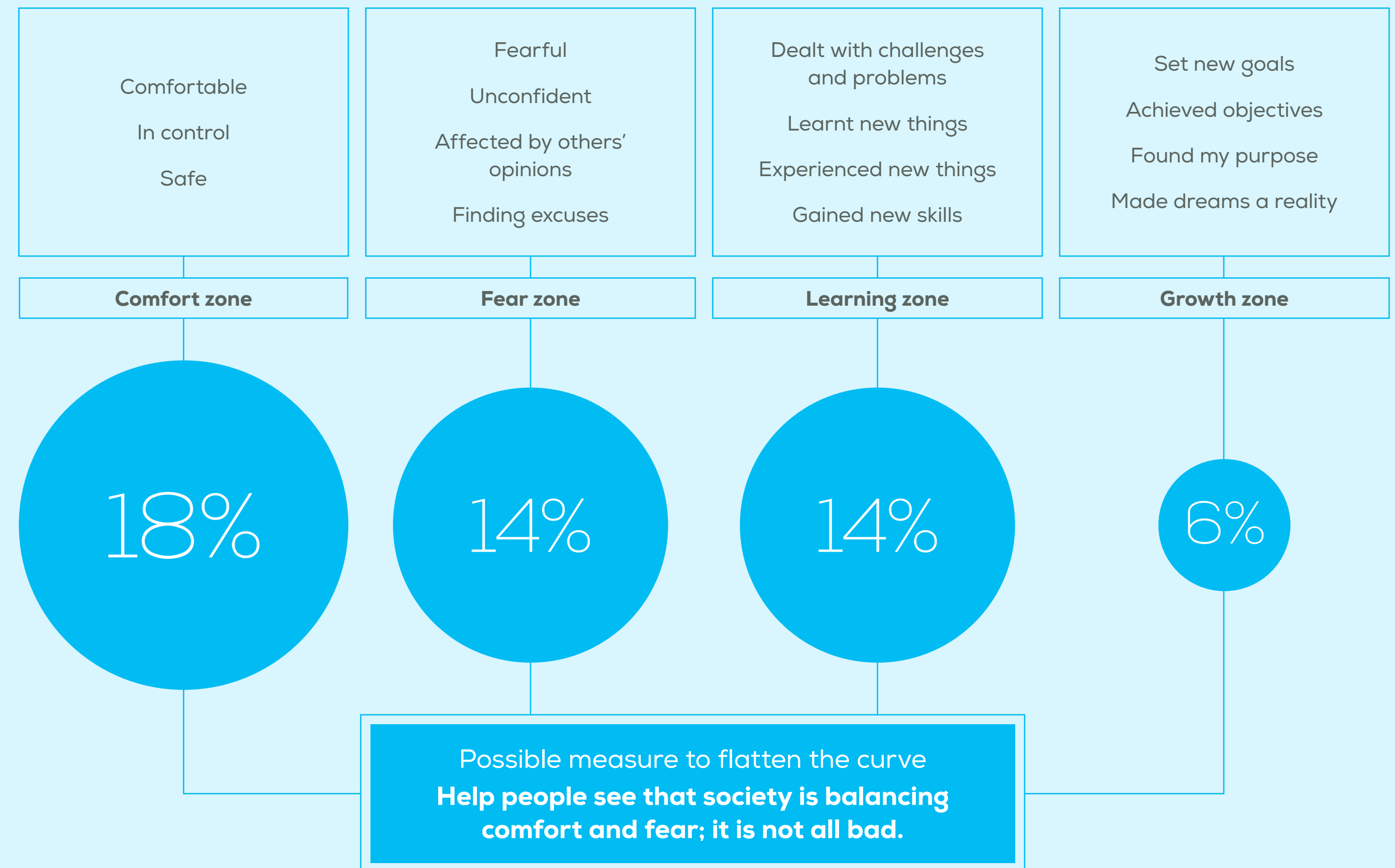
According to a recent survey of British adults by consulting firms Avansere and Poem, over the past three months people have felt a blend of comfortable, fearful and enlightened during lockdown. Indeed, even with all of the social, political and economic turmoil, people's personal experience has not been all negative.

Most Britons (18%) have been in the 'comfort zone' (in control, comfortable, safe). Slightly less people (14%) have been in the 'fear zone' (fearful, unconfident, affected by others opinions and finding excuses), but the same number of people (14%) have been in the 'learning zone' (dealt with challenges and problems, learnt new things, experienced new things, gained new skills). ▶

Question:

Which of the following best describe how you have felt or acted over the past 3 months?

Please choose the top three answers.



Key trend 7: Flattening the mental health curve

Brands need to resonate with this reality by creating communications and content that promote positivity, and help people see that society as a whole has been resilient and balanced comfort and fear in times of crisis. This is especially when it comes to choosing the right channels to engage audiences. While listening to music (33%) and watching a film (22%) are in the top five ways to relax (mainly among 36-55s), the pervasive nature of modern media and connectivity is causing Britons to distance themselves from news content and social media versus spend time with it to relax. Brands must invest time and money in creating engagement strategies that help people see that society is actually balancing comfort and fear; that the situation is not all bad; but help them filter out negative content.

Connect people

As well creating positivity platforms, over the past three months Britons have been more or less satisfied with different aspects of their life, which affects their capacity and opportunity to lead fulfilling lives; which in turn affects their levels of happiness and mental stress.

While people’s sense of ‘wellbeing’ (safety and security, shelter and prosperity) and ‘mind’ (overall mental health, learning, expression and esteem) have scored high and felt safeguarded, Britons feel most dissatisfied with a sense of ‘belonging’.

Indeed, during lockdown as people have spent more time at home, in their communities and with neighbours they have felt that the inclusiveness and equality of society as well as engagement from local government has been poor.

‘Belonging’ is a critical intervention point for brands over the coming year because the majority of UK adults find physically connecting with other people reduces mental stress (76%); and after experiencing social distancing in the past months, to deal with mental stress Britons would mostly find it helpful if a brand made physical connection with others hassle free and a joy (73%).

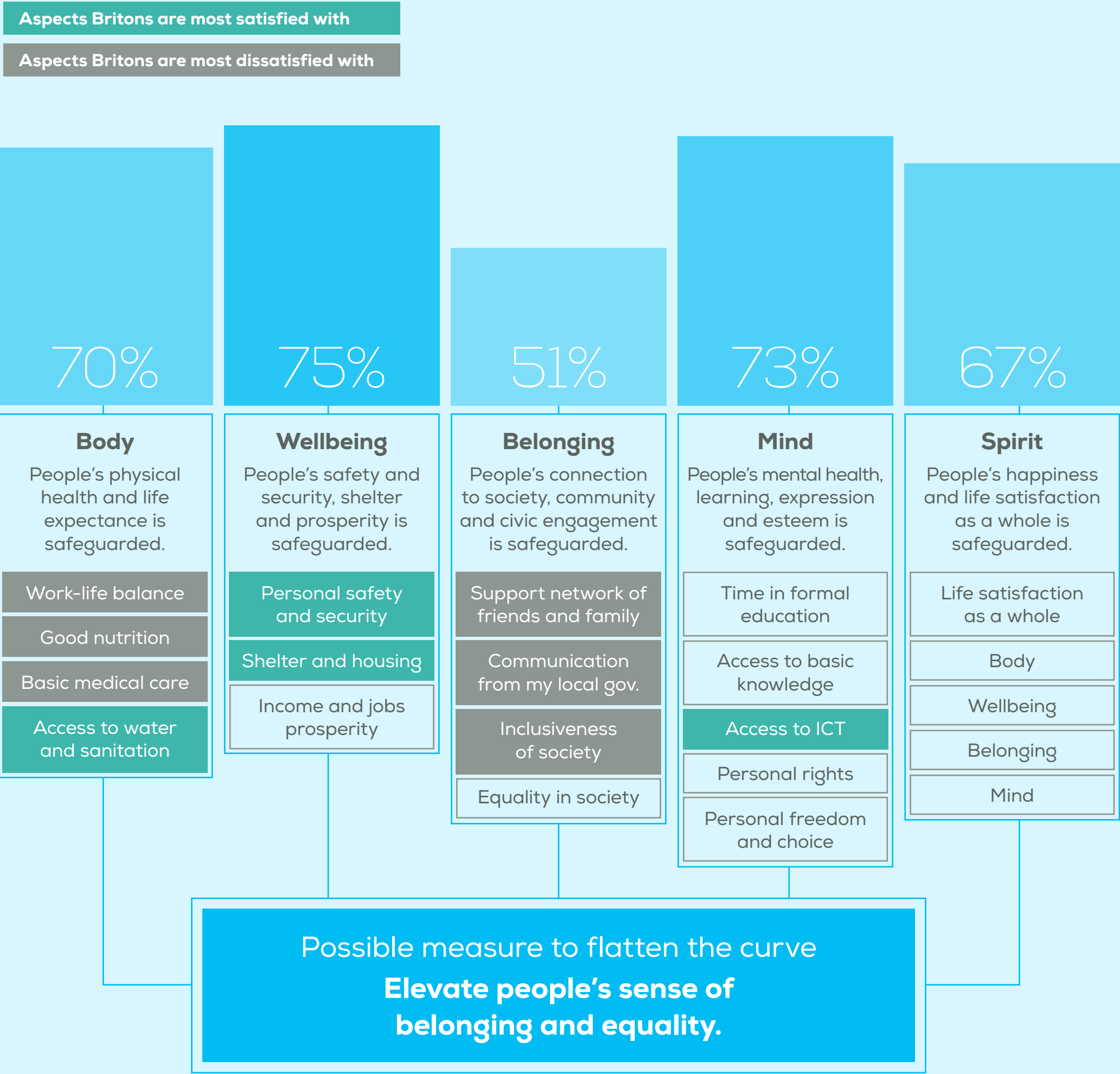
Stay home

So can brands now step in to help #buildbackbetter by being a force for good, positive and belonging? Not quite. While brands increasingly play an active role in people’s lives with products, services and experiences, most Britons (54%) are happy for no brands to help them deal with mental stress.

Having said that, some of the most recognised brands in Britain might permitted to help Britons deal with mental stress. The BBC, Amazon, Boots, Google and Waterstones are the top brands that Britons would be happy with helping them deal with mental stress. Interestingly, these top brands are leading media, e-commerce, health retail and search industries, and have naturally dominated where Britons have been focusing much of their attention during lockdown: screens, deliveries and health and wellness retail. ➤

Question:

Please indicate how satisfied or dissatisfied you are with the following aspects of your life?

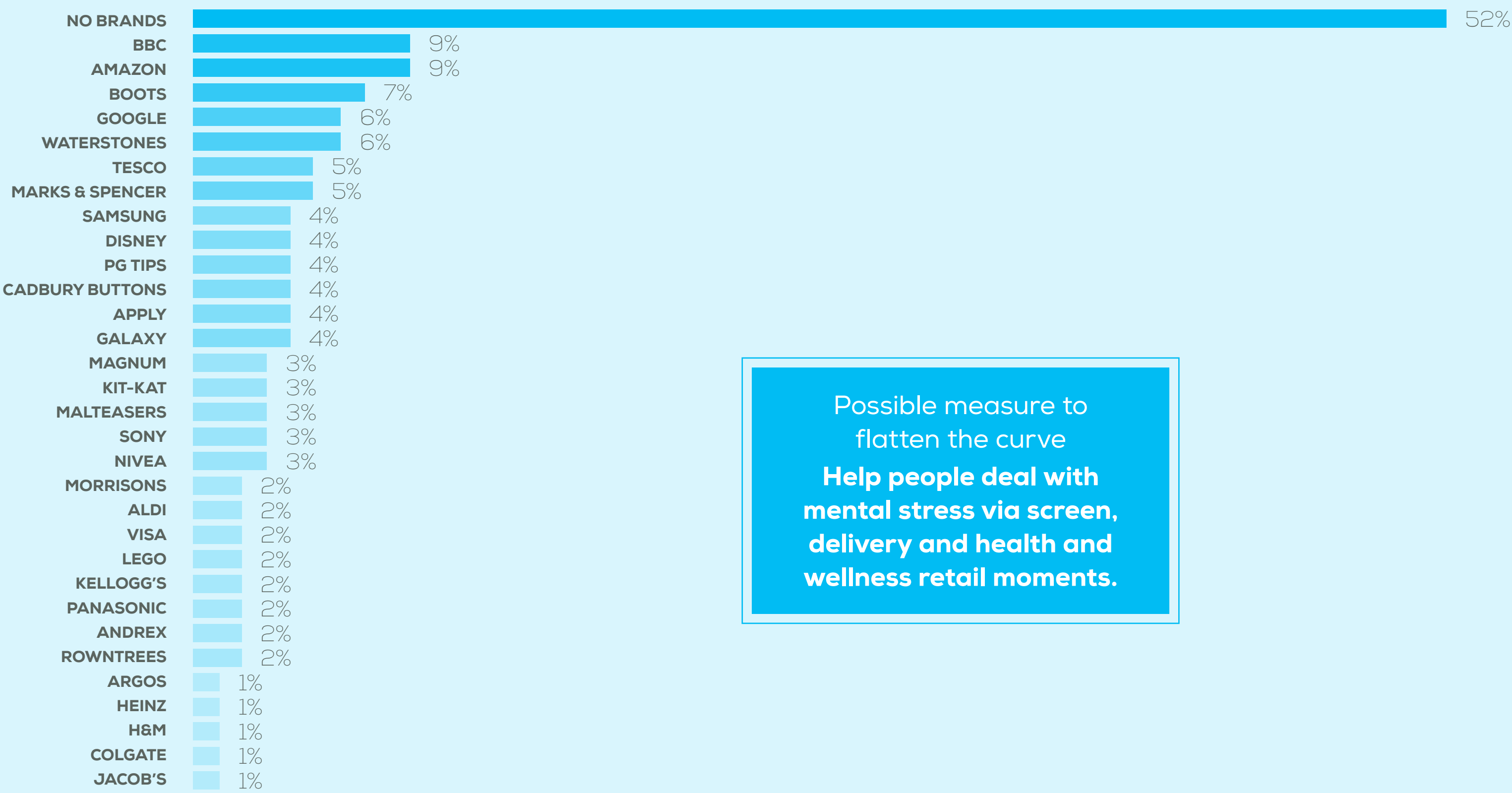


Key trend 7: Flattening the mental health curve

Question:

Brands increasingly play an active role in people’s lives, with products, services and experiences. Which of the following brands would you be happy with helping you deal with mental stress?

Please choose up to three answers.



Possible measure to flatten the curve

Help people deal with mental stress via screen, delivery and health and wellness retail moments.

So rather than focus on drawing consumers out of their homes to the high street and public venues, brands might do better by enhancing people’s domestic experience. In fact, the second highest aspect of life Britons have been most satisfied so far this year has ‘shelter and housing’, which is good news considering they say this is second highest cause of mental stress.

Rewarding direction

As the lockdown (hopefully) eases during the coming months, it is critical to use the positive effect of #thegreatpause to learn and adapt before corporations return to old and divisive and degenerative habits. Brands must spend our energy, money and time wisely in the coming year to decide what the right moves are to survive and thrive by:

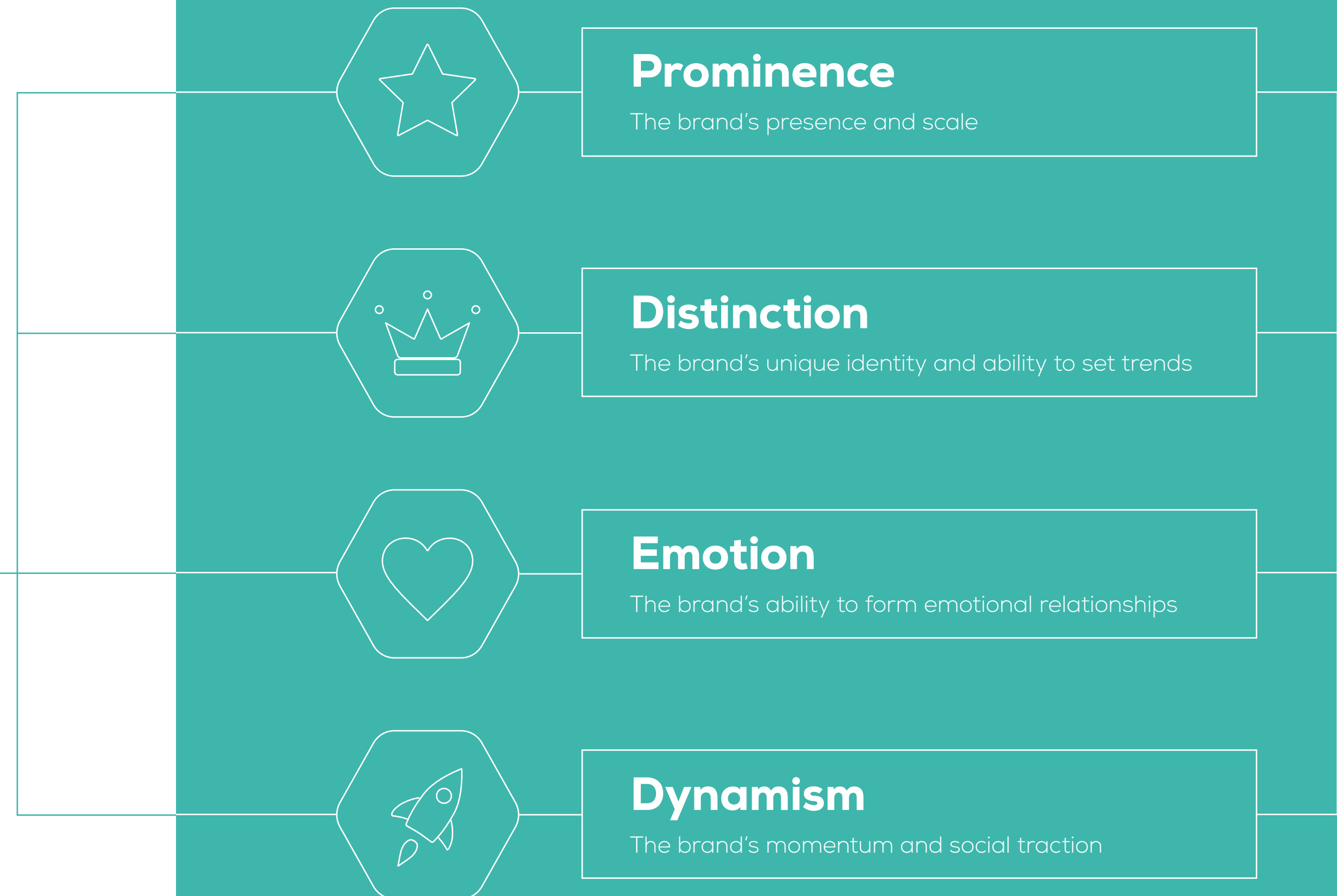
- Connecting people: providing ways and means to connect people with each other and elevate people’s sense of belonging and equality
- Being positive: helping people see that society is balancing comfort and fear; it is not all bad; and helping them filter or limit negative content and social media
- Staying home: emphasising shelter and safety are important and safeguarded; and helping people deal with mental stress via screen, doorstep and health and wellness e-commerce moments



Methodology

How we ranked the Top 100 brands

We conducted a nationally representative study amongst 4,000 consumers. Based on our experience of evaluating brands via our Connected Brands Framework, we know what makes a brand matter to consumers, so we based the Most Connected Brands Index score on the following four key measures:





How we statistically linked the measures to what matters

To ensure that our index was statistically robust and proven to relate to what truly matters to consumers, we ran correlations analysis to create the weights for the selected variables. The derived Most Connected Brands score is then calculated as a weighted average of these variables. These scores are then indexed on the average, providing a ranking of all the brands included in the study.

How we explained the why behind the brand ranking

Within the study we included other diagnostic measures that would explain the unique strengths and weaknesses of each brand. Alongside desk research, this allowed us to explain why each brand appeared in our list and areas they can target for future improvement.

Brand consideration and likely future usage

Satisfaction

Social responsibility

Value for money

Delivery on needs

Recommendation

Brand imagery

Our final diagnostic was to use our unique emotive framework. Humans are instinctive, emotional creatures and as such we are often resistant or consciously unable to articulate how we feel about a brand. Based on psychological theory and neuroscience, we have developed an emotive framework to assess the emotional response to a brand. This question is timed, as using implicit response testing can identify what consumers truly think implicitly and subconsciously about each brand.

How we derived the Top 100 UK brands

The central pillar running through the heart of our approach is to identify the brands that matter most to consumers. With this in mind, we developed the master brand list based on three data streams that speak to the different types of relationships that consumers have with a brand.

By synthesising all three data sources and applying a rank order, we established how each brand performs on three different consumer metrics:

1

The brands consumers think about

The nation's favourite brands

The first data stream was a nationally representative study of the nation's favourite brands – each consumer was invited to spontaneously type in their top 10 favourite brands. We collated over 10,000 responses (10,385) from our sample of 2,000 consumers and identified the top brands mentioned (183).

2

The brands consumers talk about

Social media velocity

We measured the social media traction for each of the Top 150 brands, identifying how many brand mentions they received on social media.

3

The brands consumers buy

Brand revenue

We collated publicly available revenue figures for each of the Top 150 brands.



Key contributors

Key contributors

Hannah Teale

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Hannah has worked in research for over 10 years and spent a significant amount of this time specialising in brand and communications development, an area she is truly passionate about. She has also been fortunate enough to work for two huge UK brands – Carlsberg and Next, running research that informed and shaped their customer strategies.

Jack Tadman

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Jack is a Research Manager at Opinium and specialises in brand proposition and new product development. He has helped diverse brands such as Direct Line, McCain and Deliveroo to better understand their audiences and develop compelling ideas using both qualitative and quantitative techniques. He also supports the political team and has spoken on diverse social topics alongside MPs, The World Bank and the IMF.

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Jake is a Communications Strategist at VCCP Media. He joined the agency as a Politics and Philosophy graduate in 2016, before being promoted into his current role in 2018. He is responsible for delivering long-term strategies to ensure clients meet their objectives. Jake has worked with multiple VCCP Media clients including Bonhams Auctioneers, New Day Credit Cards and Major League Baseball. He also works across the VCCP partnership supporting with several brands on this list.

James Crouch

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James works across our consumer attitudes and public opinion research sectors, heading up Opinium's Omnibus team. He likes to get under the skin of an issue, exploring how campaigns and brands can adapt and respond to regularly changing public attitudes.

James Endersby

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James is Chief Executive of Opinium and whilst leading a fast growing insight agency, continues to work closely with clients from a variety of sectors in the UK and around the world. Taking over the reins whilst still in its start-up phase, he has grown the agency into a major industry player working with 22 of the Fortune 100 and focusing on five core practice areas of brand, communications, product and service development, stakeholder understanding and thought leadership. James previously worked in management consulting with Monitor Group (now Monitor Deloitte) and was based out of London, Delhi and Boston.

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James has research experience in a broad range of areas from thought leadership to stake-holder engagement. He has written several thought leadership reports for Opinium on technology within healthcare and the effect the streaming industry is having on the UK. In the last couple of years he has focused on the market understanding practice area where he has gained in-depth insight into brand audience and delivered actionable insights.

Jenny Bates

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Jenny works across the marketing, events, client relations and business development functions at Opinium and is involved in all non-research based operations at the agency. She is a project coordinator turned-marketer who helps develop Opinium's marketing strategies.

Joe Curran

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Joe is a Research Executive at Opinium working across brand and communications, thought leadership and product and service development for clients such as WorldRemit, Arco and PwC. Joe sits on the political polling team and has contributed to several publications including Opinium's Mental Health Wellbeing Audit and Multicultural Britain.

Key contributors

Tom Savigar

Founder of Avansere AS

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For two decades, Tom has been forecasting and making the future happen with The Future Laboratory for the world's biggest and best known brands. After hundreds of successful projects worldwide that benefit organisations economically, more often than not, even the best foresight and ideas to deliver positive impact lie on the shelf unused, or worse still on the workshop room floor. Today we are experiencing a more demanding 'urbane' human, outmoded industry systems, the 'beyond GDP' movement, uncertain economies, pressured natural environment, and imperatives to move from sustainable to regenerative enterprise. Conceived at the dawn of the 2020s Avansere focuses on the mountain we must all climb together – accelerating the transformation of organisations that, if advanced, will ensure we all do well within planetary boundaries.

Tom Stone

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re:act

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Tom is the Managing Director of re:act; a creative content agency (with a few subtle differences). In his former life client-side, he has worked in both Local and Global brand roles across highly differentiated FMCG categories. He won numerous awards in this time at both Unilever and L'Oreal. He regularly undertakes public speaking and university lecturing on a selection of marketing topics.

Wez Eathorne

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Wez has worked in brand and communications research for over 20 years and is passionate about helping brands forge deep and meaningful connections with consumers. He has been fortunate to have worked with many of the brands that appear in the Most Connected Brand Index such as Cadbury, Samsung and PayPal. He is particularly interested in brands that have successfully managed to forge a true emotional bond with consumers, representing much more than the products and services they provide.

Zoe Crowther

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Zoe Crowther is Managing Partner at Red Brick Road, an integrated independent communications agency based in Farringdon. Zoe has worked at creative agencies for over 20 years, including Leo Burnett, M&C Saatchi, WCRS and BMB. During this time she has partnered a broad range of clients over a variety of sectors to deliver integrated marketing strategy and advertising campaigns. Highlights of this include an IPA effectiveness winning campaign for Yorkshire Tea, and highly effective work for clients such as Boots, Tui, Freeview and Kelloggs to name a few. Zoe is also a Bloom mentor, supporting empowerment and development of female talent across the communications industry.



What people think,
feel and do

Let's chat

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