



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

2020 was an unprecedented year for cultural change in the United States and 2021 shows no signs of letting up. Of course, Covid-19 has caused a seismic shift in the way we work, socialize, shop, relax, and engage. That would be plenty on its own, but the US has also faced a historic reckoning around police violence and racism, bringing millions of Americans into the streets during a global pandemic. Our society remains bitterly divided along party lines, as we face another contentious and culture-shifting election outcome.

Brands have been under enormous pressure to respond to these multiple crises and to adapt the roles they play in our lives, offering guidance, hope, safety, and distraction. Increasingly, consumers expect brands to take a stand on key issues—notably, 71% of Americans think brands have a role in responding to the issue of police violence. 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 6,100 people, collated 9,000 spontaneous brand mentions and facilitated 48,000 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.



James Endersby
CEO,
Opinium



Giulia Prati
Vice President, US Research,
Opinium

Brand marketing in a crisis: what marketers can learn from 2020

Grace Tulip, Research Manager, Opinium

As brands look to 2021 and Covid-19 cases spike again across the United States, marketers have much to learn from how consumers reacted to brand initiatives throughout 2020. The pandemic that has changed consumer behavior worldwide, sending people into fits of stockpiling toilet paper and filling the games cupboard in a vain attempt to keep children entertained while forced to stay at home during spring and summer months. Brands were faced with a difficult choice, keep marketing and spending money without knowing what would happen next or go quiet and wait for things to return to “normal”. If that wasn’t a confusing enough landscape to navigate, the development of the Black Lives Matter protests around the country pushed brand identity into a completely new realm as brands were forced to confront their principles.

Going back to the start of the pandemic, as the gravity of the situation sunk in and stay-at-home orders began to come into place, brands started to go dark, pulling advertising and waiting.

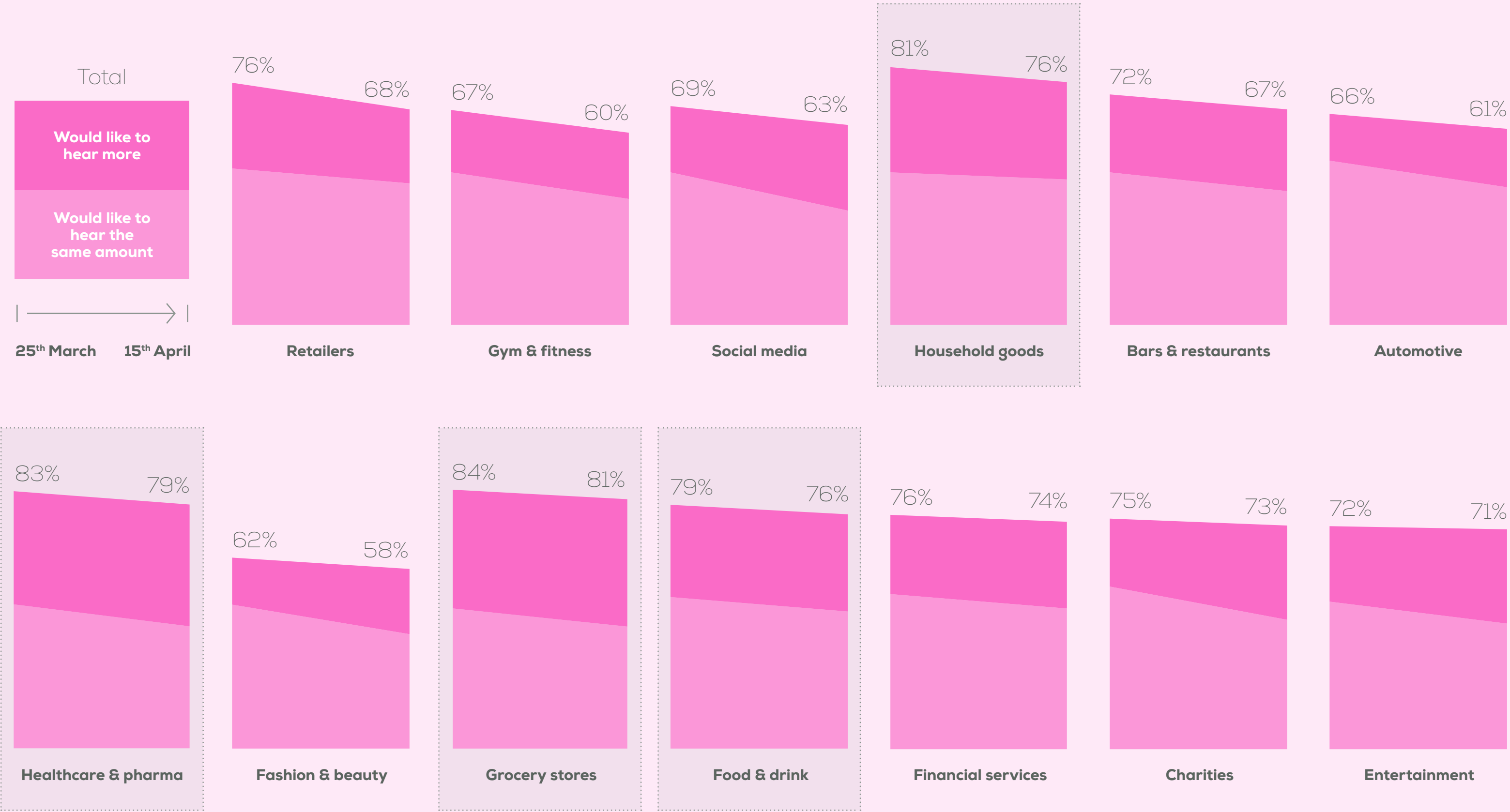
During April we saw 81% of large advertisers deferring ads* and it was understandable. In a time where the world is facing a public health crisis, it’s hard to know what to say. If you carry on business as usual are you callously ignoring the peril facing the public, if you engage and recognize the pandemic will it come across disingenuous?

However, silence wasn’t what consumers wanted. What we found was that consumers still wanted to hear from brands. In fact, even near the start of the pandemic we were seeing that Americans wanted to hear the same amount or more from brands compared to usual. As time went on, although this eagerness to hear from brands started to taper off, there were still no calls for them to go silent. ▶



How vocal should brands be?

Would you like to hear more or less from these types of company at this current time?
c.2,000 US adults



Looking back to how consumers feel that brands reacted in those early months, we saw that it was the brands that showed themselves to be responsive to the pandemic, and clearly communicated how they were looking after their employees and their customers who were the ones that did well. For example, back in April we saw the perceptions of Walmart and Amazon rise following the announcement of their plans to hire a combined additional workforce of 250,000, along with hiring bonuses and temporary pay rises for their workers. ▶

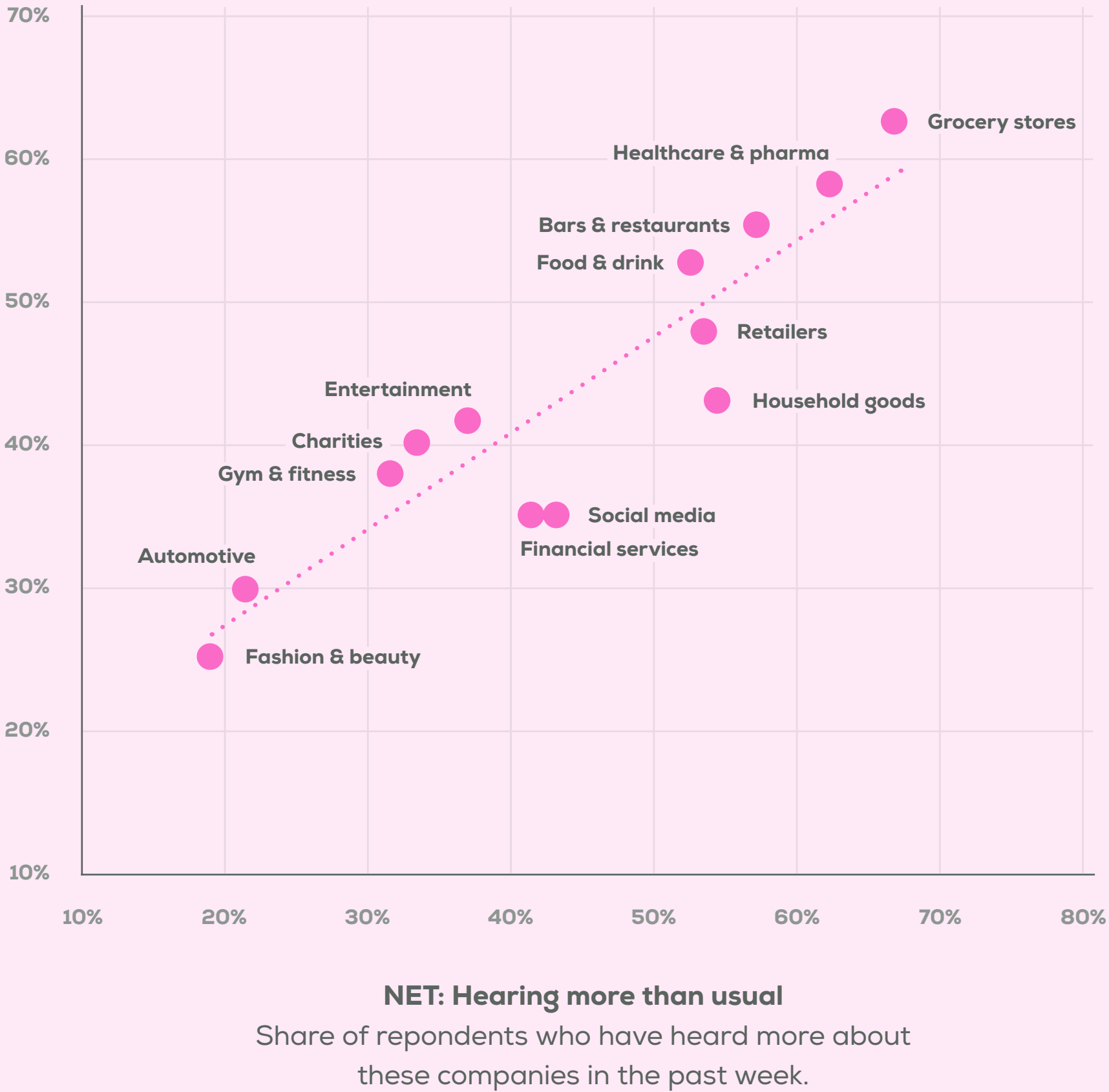
There is an important balance to be made in how communications were handled as brands started to become more vocal. We saw that some brands overstepped the line, straying into feeling insincere with consumers becoming increasingly likely to say that brands were jumping on the bandwagon in their messaging. By May we were seeing 64% of consumers feeling this way and 49% felt they were taking advantage of the situation. At this stage, it was important to have a voice, but brands needed to be careful that they were being sensitive to the situation facing Americans. With finances being hit there were choices to be made on where to spend money, and half of Americans were expecting to spend less during the pandemic.

By the time we were in the height of summer, brands had a whole new challenge to face. As the BLM movement spread, polarizing debates across the States, we saw consumers’ expectations of brands were high. Seven in ten (71%) felt that brands should respond to the protests over police violence, but what they wanted brands to say was (like many issues facing the nation) polarized. For example, of Americans who were Republican-leaning in their political views and thought brands should weigh-in, a quarter felt that brands should prioritize a statement denouncing looting. However, on the other side we saw 29% of Democratic-leaning Americans wanting brands to prioritize a statement in support of racial equality.

So what should brands do? A fifth of Americans reported that they would stop buying from brands they felt were hypocritical when it came to their reactions to the protests, while half felt that in June brands were simply jumping on the band wagon. This is obviously a moral decision that brands need to come to, and will depend on a myriad of factors, but above all else consumers want them to be authentic and consistent.

NET: Responded well to the crisis
Share of repondents who think these companies have responded well to the crisis

Responded in the best way – industry



Base: 2,006 US adults

Who we spoke to

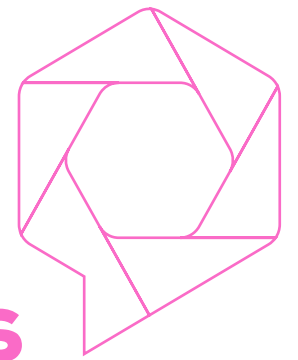
6,100 Consumers

9,000 Spontaneous
brand mentions

48,000 Brand
reviews

What it means to be Most Connected

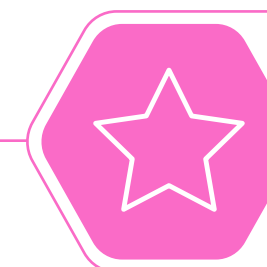
Connected brands are indispensable to consumers' daily lives. They challenge conventions, build unbreakable bonds and define how we interact. And they do this whilst remaining true to who they are.



The Most Connected Brands Index (MCB Index)

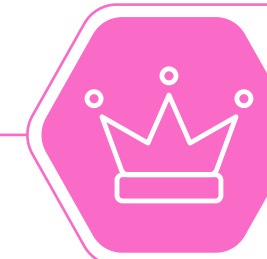
The MCB Index is the combination of four key brand metrics which are weighted together to produce a one-number summary of a brand's ability to connect with consumers.

We measure connection across four key characteristics:



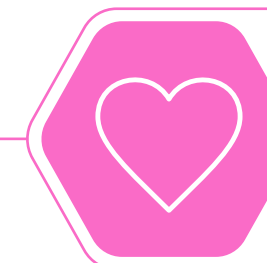
Prominence

The brand's presence and scale



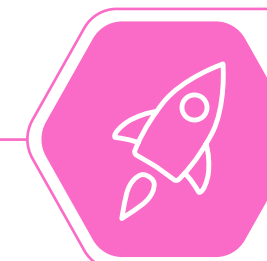
Distinction

The brand's unique identity and ability to set trends



Emotion

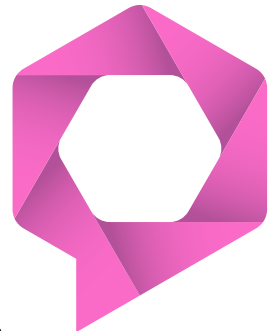
The brand's ability to form emotional relationships



Dynamism

The brand's momentum and social traction

The Top 100 Most Connected Brands US



01	02	03	04	05	06	07	08	09	10	11	12	13	14	15	16	17	18	19	20
amazon	Google	Lysol	UNITED STATES POSTAL SERVICE	YouTube	HERSHEY'S	CLOROX	Reese's	m&m's	Walmart	Kraft	ups	Lays	SAMSUNG	DAWN	Apple	Doritos	NETFLIX	Microsoft	HEINZ
21	22	23	24	25	26	27	28	29	30	31	32	33	34	35	36	37	38	39	40
Tide	Disney	FedEx	McDonald's	Kellogg's	Crest	Coca-Cola	Bounty	QUAKER	Colgate	Dove	THE HOME DEPOT	SONY	LOWE'S	hp	NISSAN	Campbell's	Wendy's	General Mills	Target
41	42	43	44	45	46	47	48	49	50	51	52	53	54	55	56	57	58	59	60
facebook	Ford	Betty Crocker	Nestle	mastercard	Levi's	Olive Garden	NIKE	Chick-fil-A	DUNKIN'	TOYOTA	verizon	Hanes	KFC	DELL	TACO BELL	ebay	LG	DOLLAR TREE	G
61	62	63	64	65	66	67	68	69	70	71	72	73	74	75	76	77	78	79	80
CVS pharmacy	Domino's	CHEVROLET	adidas	SUBWAY	HONDA	STARBUCKS COFFEE	hulu	pepsi	WHOLE FOODS MARKET	Under Armour	Bath & Body Works	GE	Dr Pepper	Nintendo	PlayStation	Great Value	Folgers	COSTCO WHOLESALE	SKECHERS
81	82	83	84	85	86	87	88	89	90	91	92	93	94	95	96	97	98	99	100
Neutrogena	AT&T	KOHL'S	Jeep	ALDI	macy's	TRADER JOE'S	Suave	OLAY	NISSAN	OLD NAVY	sam's club	BEN & JERRY'S	CONVERSE	PANTENE	Champion	VICTORIA'S SECRET	SUBARU	NEW BALANCE	L'OREAL



Here's to the movers, the shakers and the mischief makers

Marketing in the midst of a political, economic and public health crisis

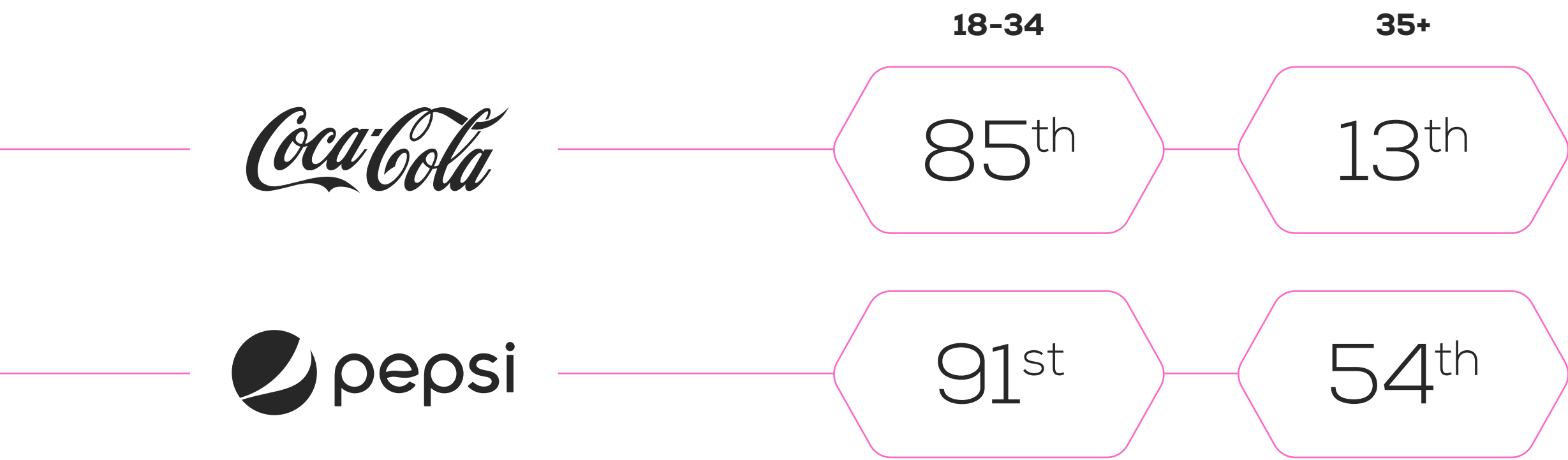
Marketing in the midst of a political, economic and public health crisis

Wez Eathorne, Research Director, Opinionium

No longer the “Choice of a new generation”

The battle between Pepsi and Coke is well storied and part of marketing folklore. Both brands arguably reached their peak in the 80s with Pepsi’s “Choice of a generation” campaign featuring megastars like Michael Jackson and Coke’s “I’d like to buy the world a Coke” forever linking the brand to Christmas. However, these iconic brands now find themselves

in the same battle, and they are currently both on the losing side. The Most Connected Brands study shows that both brands are losing traction amongst younger consumers. This can be linked to less familiarity with the brands’ marketing heydays, combined with a greater focus on health and wellbeing challenging the soft drink category.

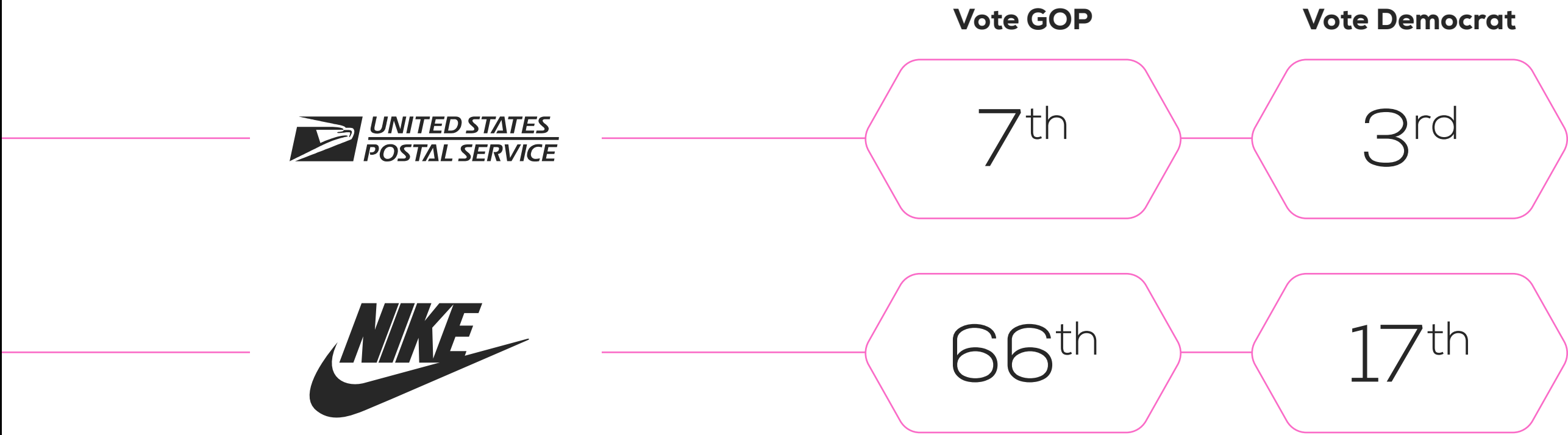


For once,
Don't Do It.

Politics and brands collide

America is more divided than at any point in modern history. Political and racial tensions are at their most conflicted since the America Civil War. The division is so prominent that it is even coloring the brands people connect with and use. The Most Connected Brands study shows that political affiliation hugely affects how people view brands, with some becoming casualties of the division and others attempting to exploit it.

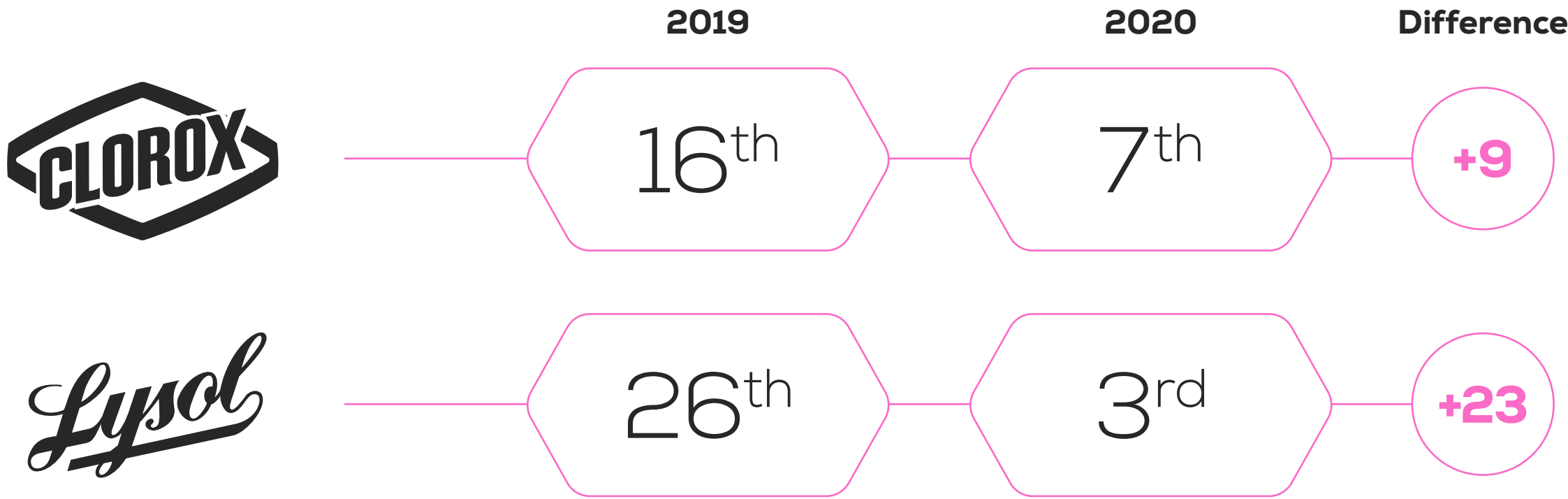
One brand unavoidably drawn into the political debate is the US Postal Service, with concerns about voter fraud turning it into a political football, whilst elevating the brand in the public's consciousness. Other brands like Nike are stepping into the debate, with vocal activism for the Black Lives Matter movement, culminating in their recent 'For once don't do it' anti-racism campaign.



Cleanliness is next to godliness

With the study conducted during the midst of the pandemic, the seismic impact that the crisis has had on how we shop, relax and communicate is stark. Two brands that have surprisingly been pushed into the spotlight are Clorox and Lysol. Humble cleaning product manufacturers, both have surged up the Most Connected Brands ranking during the pandemic. With disinfectant a proven weapon against the

spread of the virus, stores sold out of the products at the start of the pandemic, with a 5 pack of Lysol disinfectant spray being sold for \$227.50 at one point on eBay. However, both brands have reacted well to their newfound responsibility, acting as public health guardians, at one point even realizing joint warnings not to consume their products, following an intervention from the President.



Social distancing from entire sectors

One of the most telling changes during the pandemic has been how it has affected the way we socialize. Almost overnight, city centers and offices around the country turned into ghost towns, with consumers following government guidance to only venture out when essential. With many spending long periods at home (often in sweatpants) sectors like fashion and personal care have taken a real hit.

	2019	2020	Difference
	53 rd	83 rd	-30
	70 th	88 th	-18
	80 th	95 th	-15
	86 th	100 th	-14
	43 rd	53 rd	-10



Connecting in a socially distanced world

The final change driven by the pandemic is how we remain connected with friends and family when socially distanced. The technological explosion in video conferencing and virtual meetings is well publicized. However, it has also seen more traditional means of connection enjoy something of

a revolution. One example is the postal service, with parcel delivery companies and couriers marching up the Most Connection Brands ranking as the nation desperately tries to play a physical role in loved ones’ lives, whilst forced apart.

New to the MCB list



4th



12th





Top scores by key measures

Top scores by key measures

Adam Drummond, Associate Director, Opinionium

Customer engagement is a term that can mean many things but most importantly it means connecting with consumers, particularly at a time of uncertainty over the pandemic and on the heels of a contentious and divisive election.

Brands that are part of our everyday lives have to walk a fine line between offering reassurance but not seeming complacent, and of expressing their values while avoiding alienating those whose opinions differ.

Our Most Connected Brands Index 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 stand the test of time by forging an emotional connection

2

Social responsibility won't do it on its own

3

National institutions bridge the political divide

4

We don't love tech, we love what it delivers

5

Doing what you do well is necessary but not sufficient

1

Brands stand the test of time by forging an emotional connection

The brands with the strongest emotional connection are those that are rooted in consumers' childhoods, that they have grown up with and which have been a part of their day-to-day lives for decades.

In *Mad Men*, Don Draper calls Hershey's "the child symbol of love" and that description certainly helps explain the brand's leading position when it comes to emotional connection. But as well as other confectionary companies such as M&Ms, it is joined in the Top Five by household cleaning brands like Clorox and Lysol which people will have seen their parents use in childhood before beginning their own relationship with them in adulthood.

The brands that stand the test of time are those that forge a connection in childhood, which combine nostalgia with everyday utility and practicality.





2

Social responsibility won't do it on its own

While none of our Top 10 brands fares particularly badly in terms of their ratings for social responsibility, it is striking that they beat the rest of the pack more convincingly on other measures such as prominence, meeting your needs, dynamism and buzz. The top four brands for social responsibility are in the Top 10, but so are brands like YouTube, which fall further down the pecking order.

3

National institutions bridge the political divide

In a contentious election year, something that unites Democrats and Republicans is their love of Amazon, Google, Lysol and the US Postal Service. In fact it's encouraging that the Top 10 is similar for supporters of both parties with notable exceptions being Walmart and Reese's which are more popular among Republicans than Democrats. Netflix lands in the Top 10 for Democrats reflecting its left-leaning stances, while Republicans acknowledge the long-standing conservative lean of Chick-fil-A.



4

We don't love tech, we love what it delivers

Facebook's reputation is far more controversial today than the heady days of the early 2010s but political polarization alone doesn't explain why the brand is so much further down the rankings than other high-profile tech brands. Neither Democrats nor Republicans put Facebook in their Top 40 brands compared to a Top 20 dominated by tech brands.

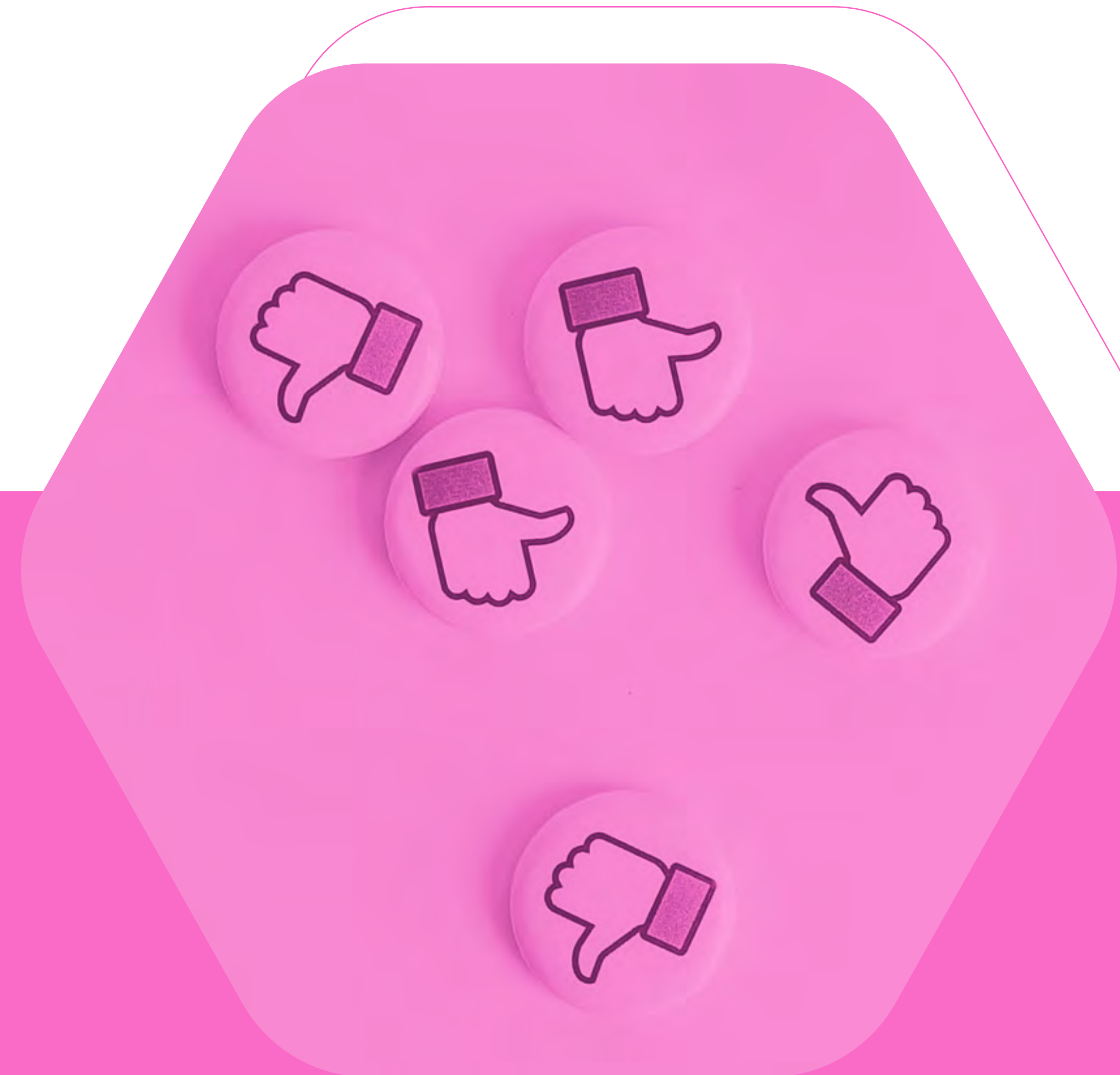
The answer may be that people don't love tech companies, they love the things tech companies bring them or make possible. Google provides services essential to life in the 21st century, Amazon is synonymous with online retail and provides its own products and services, Samsung and Apple make products people value. But for social networks, the "product" is your own family and friends with Facebook merely facilitating that. Facebook's low ranking suggests consumers see it more like a telecoms provider than a tech company.

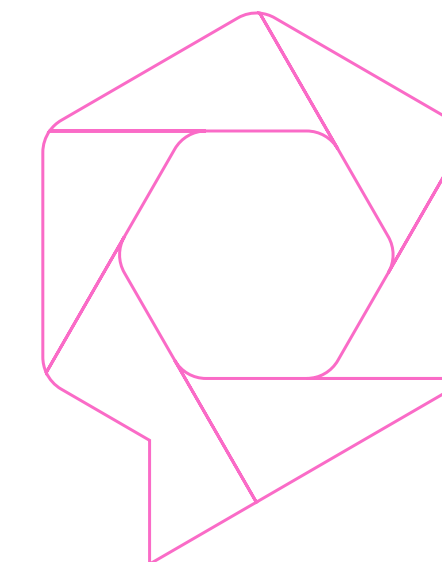
5

Doing what you do well is necessary but not sufficient

When we look at where the Top 20 brands over-perform relative to the rest, it's not on the day-to-day measures like satisfaction and likelihood to use again. The things that separate merely great brands from the true leaders in their field, are prominence, dynamism, distinction and being different.

On the day-to-day measures, they still over-perform but not by nearly as much, suggesting that to truly break free of the pack, a brand has to deliver something else.





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

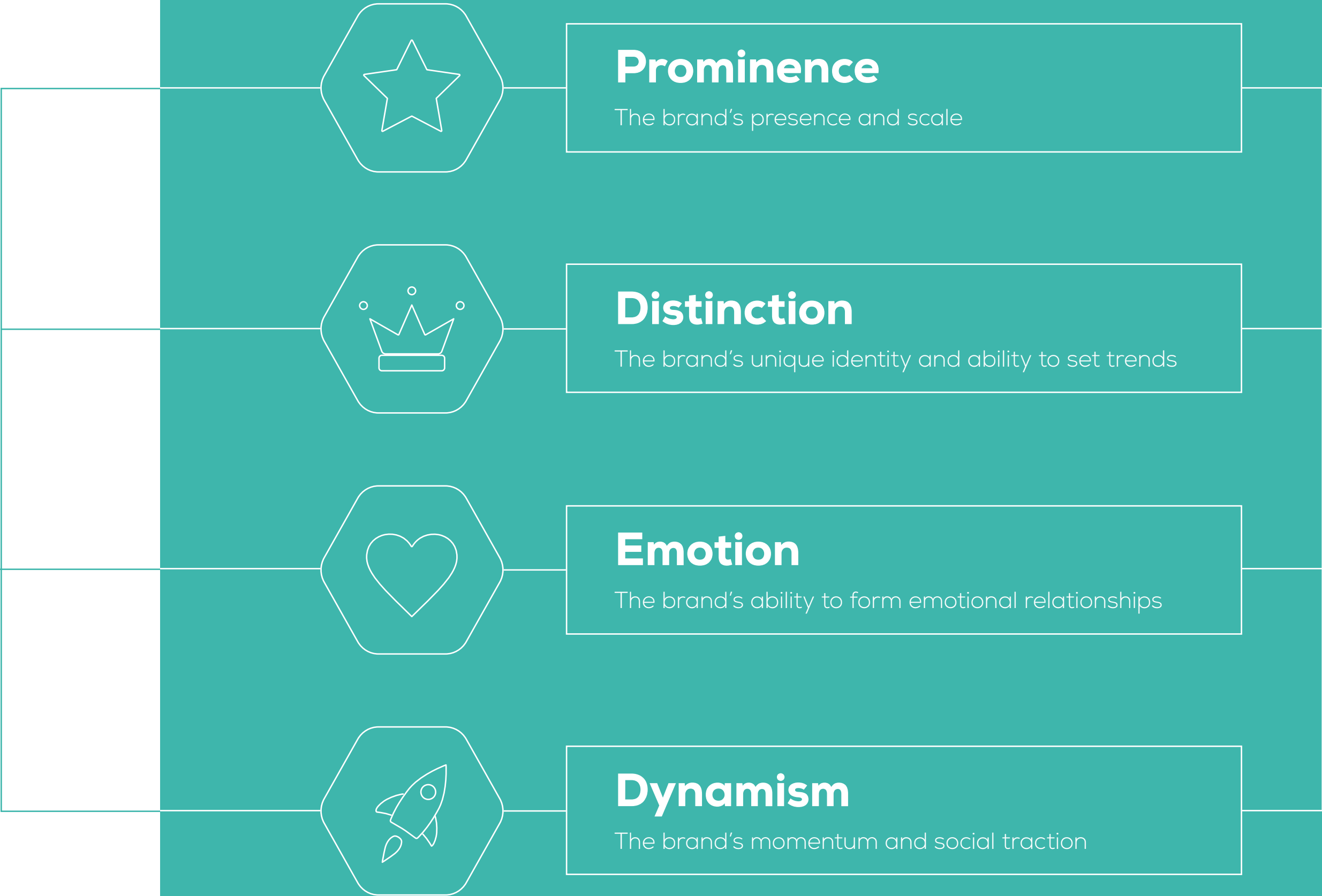
- 1 Maintain consistent values that are authentic and can't be faked
- 2 Take a stand when you feel it is right. Social responsibility alone is not going to vault you to the top but it can be an important part of standing out and making sure that, when you do take a stand, people take you at your word
- 3 Make sure your appeal goes beyond politics. There's nothing wrong with taking a stand but most people don't pay that much attention to politics outside of elections and will need a reason to choose you that goes beyond supporting your values
- 4 Recognize where you deliver value and find ways to increase it rather than just being an easily replaceable conduit to the things consumers really want
- 5 Find a way to stand out beyond just delivering products and services that your customers want and appreciate in order to lead the field and remain top of mind



Methodology

How we ranked the Top 100 brands

We conducted a nationally representative study amongst 6,100 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

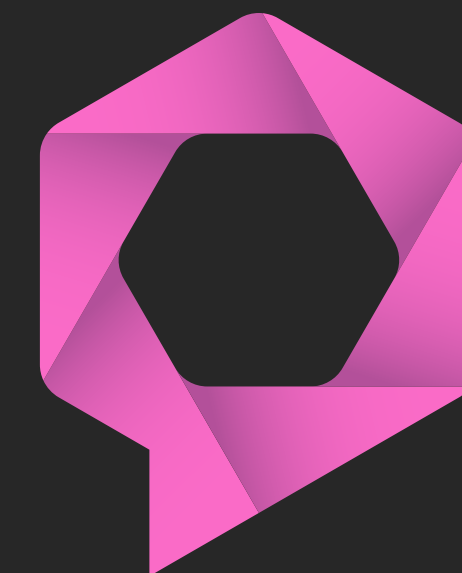
Our final diagnostic was to use our unique emotive framework. Humans are instinctive, emotional creatures and as such we are often resistant or consciously unable to articulate how we feel about a brand. Based on psychological theory and neuroscience, we have developed an emotive framework to assess 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 US 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 synthesizing all three data sources and applying a rank order, we established how each brand performs on three different consumer metrics:





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Let's chat

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