




What people think,
feel and do



The Most Connected Brands 2019

Brands must continually find new
ways to connect with consumers
in order to thrive and grow

A photograph of three women wearing straw hats, laughing and whispering to each other. The image is overlaid with a teal gradient. The text 'What people think, feel and do' is written in white on the right side.

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.

opinium.com

research@opinium.com



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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.

Not just another brand index

Foreword

Why launch another brand index?

This is probably the question we have been asked more than any other over the past year. And, from an outside perspective, we can understand why. There is a proliferation of indices already available to marketers, brand owners and communications professionals.

But despite differing methodologies, markets and presentations, we noticed that they all had one thing in common. All of these indices ranked the performance of brands using a black box analysis that was defined by experts working in the industry. None of them simply asked the people that have the power to build, define and sometimes destroy the brands and businesses that marketers create: the consumers themselves.

The Most Connected Brands Index was born out of this idea. That we would create an index based on what consumers think, feel and do.

And so, in 2018, we did just that.

Twelve months on we've expanded to include the US. 12,000 consumers, 22,000

spontaneous brand mentions and 96,000 brand reviews, all fed through our analytical framework.

No black box solutions.

Just the brands that consumers connect with each and every day.

As we approach 2020, we believe that building connection has never been more important. Whatever your political, economic or social viewpoint, 2019 has been a year of unprecedented rapid change, change which shows no sign of abating. The ability of people, brands and businesses to create lasting connections has become fundamental to both personal and professional success.

Whether you read Most Connected Brands from cover to cover, or simply flick through the pages until something catches your eye, we hope this report interests, excites and inspires you to create, build and grow the connections that matter to you.



Kate Jalie

Director,
Opinium



Steve Looney

Director,
Opinium

Who we spoke to

12,000

Consumers

22,000

Spontaneous brand mentions

96,000

Brand reviews

26

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	SAMSUNG	ebay	HEINZ	WALKERS	YouTube	ALDI	Microsoft	NETFLIX	LEGO	Colgate	Apple	TESCO	Boots	Coca-Cola	LIDL	BBC	M&S
21	22	23	24	25	26	27	28	29	30	31	32	33	34	35	36	37	38	39	40
SONY	Argos	PayPal	Kellogg's	facebook	Sainsbury's	ASDA	FAIRY	Disney	Dove	dyson	sky	McVities	NESCAFÉ	NIVEA	IKEA	Morrisons	BirdsEye	WhatsApp	adidas
41	42	43	44	45	46	47	48	49	50	51	52	53	54	55	56	57	58	59	60
McDonald's	NIKE	PG tips	JOHN LEWIS & PARTNERS	Ford	Gillette	Tetley	Iceland	b&m	Superdrug	next	BOSCH	PRIMARK	Nestlé	mastercard	Nationwide	BMW	COSTA	Clarks	VW
61	62	63	64	65	66	67	68	69	70	71	72	73	74	75	76	77	78	79	80
Audi	wilko	pepsi	Virgin	OP	Levi's	hp	Panasonic	LURPAK	LG	Instagram	GUINNESS	Mercedes-Benz	E	Twitter	PS	TOYOTA	WAITROSE & PARTNERS	TWININGS	HALIFAX
81	82	83	84	85	86	87	88	89	90	91	92	93	94	95	96	97	98	99	100
Santander	DELL	Nintendo	easyJet	BT	TKmaxx	KFC	CHANEL	LUSH	Debenhams	HONDA	H&M	MARMITE	Uber	NISSAN	vodafone	LLOYDS BANK	STARBUCKS COFFEE	VAUXHALL	VANS

Movers and shakers

2018 vs 2019 Most Connected Brands UK

The second annual Most Connected Brand study offers the opportunity to measure which brands are on the way up and which are on the way down?

When viewing the biggest movers on our list, the most common characteristic is that there is no common characteristic.

Hypotheses that we would see a tech wave as Silicon Valley brands dominate or a purging of traditional high street brands haven't come to pass. As a matter of fact, the brands with most momentum on our list straddle entertainment services, FMCG and even the much-maligned retail sector.

What this shows is that connection isn't inherent to any individual sector but a unique bond between the individual and the brand.


The diversity in the list of brands with momentum was encouraging, not just in terms of sectors but also in the very different ways each brand forges a connection with consumers.


As a quick roll-call of the key movers, we have Walkers that leverages emotion, Netflix which is charged with dynamism, Aldi prominence and LEGO distinction. All of the key movers play to different strengths and show the importance of measuring multiple facets of connection.

However, behind each increase there is a story, be it clear-sighted marketing decisions, brave creative campaigns or great product innovation.


 Walkers is an example of a brand steeped in the very fabric of the nation. Our study shows that Walkers is a brand that makes us smile – something Walkers marketing director Fernando Kahane recognises when explaining Walkers is “not in the business of crisps, we are in the business of enjoyment”. However, the brand hasn't relied on nostalgia alone, releasing a new Spice Girls fronted campaign to spark talkability along with a two-pronged approach to product innovation. With punchy new product flavours targeting younger palettes and a baked range for more health-conscious consumers.


 Netflix has revolutionised the way we consume entertainment, invested considerably in its own content and pervaded the public consciousness to the degree it has entered the urban dictionary as a well-known euphemism. All of which leads to it being seen as a brand that pushes boundaries, makes us smile and caters for everyone's unique needs in our study.

 Aldi's strength is anchored in value for money, disrupting the category with its no frills approach, recognising there is satisfaction to be had in low prices.

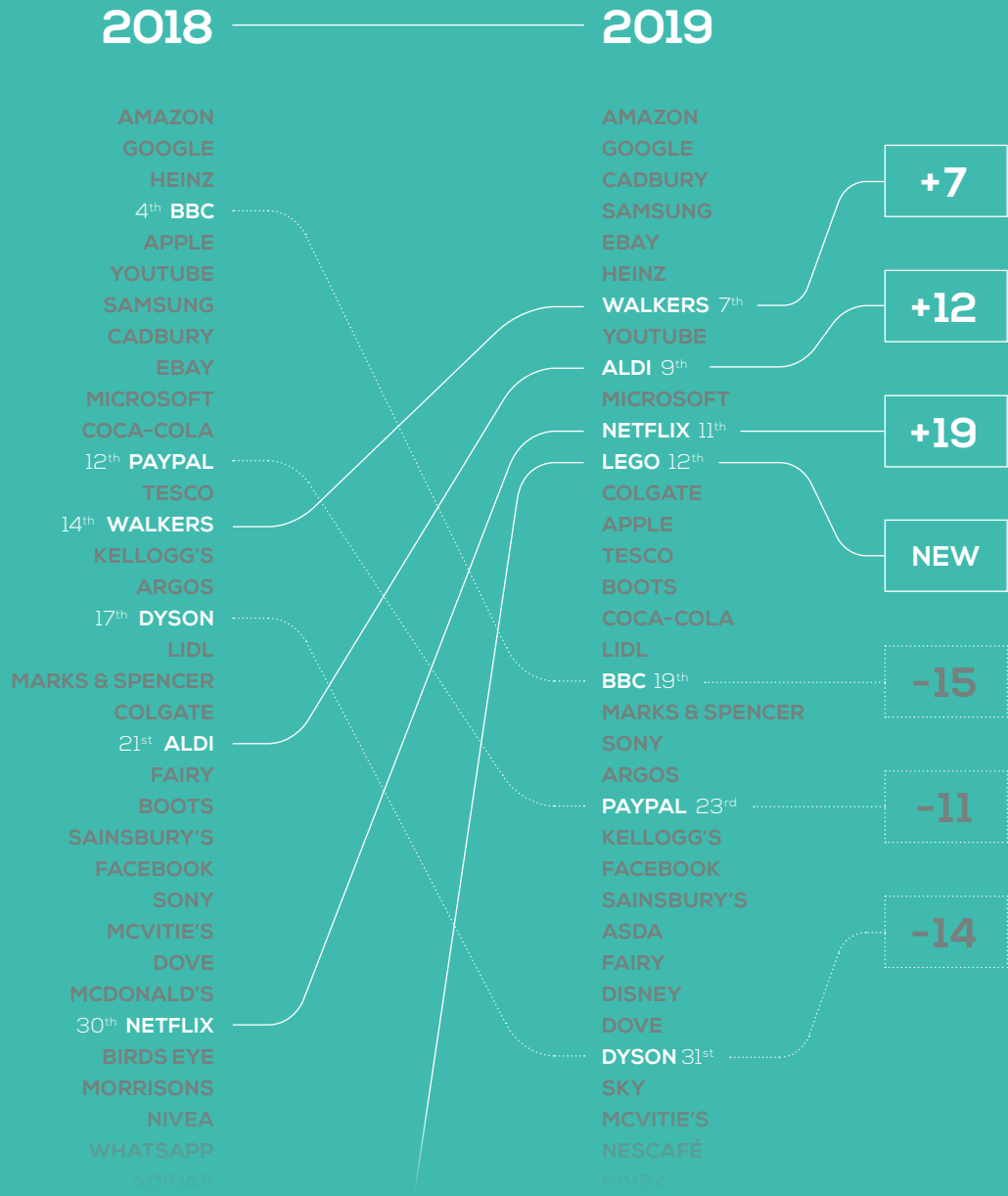
 LEGO taps into the child in all of us, we all remember our first set, or the look on our child's face as they received their first set. However, LEGO hasn't relied on nostalgia – most recently investing in movies, video games, YouTube channels and even Theme Parks.

However, where there are winners there are also losers. The three key fallers in our top 50 all face unique and clear challenges.

 For the BBC it is the drip-drip of negative media attention, coupled with the fact that competition for our interest has never been higher, via the rise of streaming services.

 The challenge facing PayPal is remaining disruptive and relevant in the rapidly evolving FinTech category, where safety and speed are now hygiene factors.

 Dyson potentially suffers from a polarising stance on the political issue of Brexit, along with the poorly timed decision to move their headquarters to Singapore.

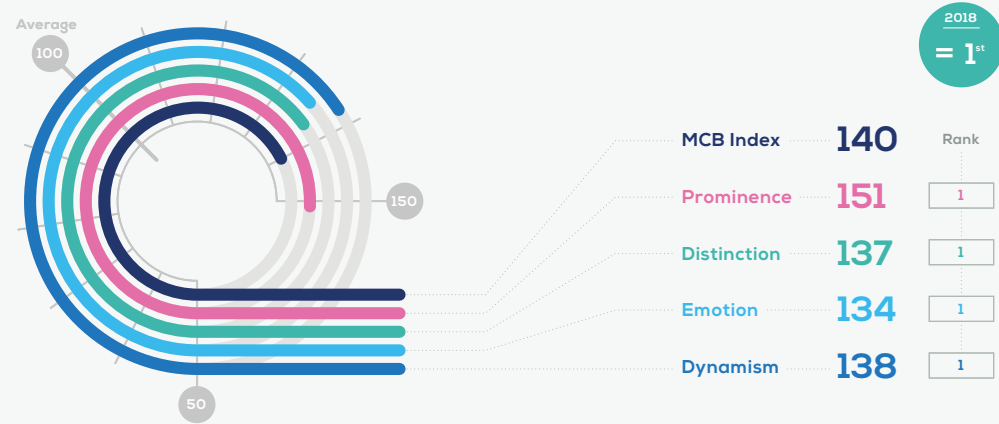




The top 15 Most Connected Brands UK



AMAZON



Still in prime position

Retaining a title is always satisfying, but to do so in such emphatic style must leave Amazon extremely pleased. The online giant's overall brand score and MCB Index have both risen, and the brand increased its rating across all bar one of our four constituent metrics.

One of the reasons for Amazon's success, both commercially and creatively, is its sheer ubiquity. Its stated ambition to be The Everything Store is lofty enough, but the company is much more than a retailer.

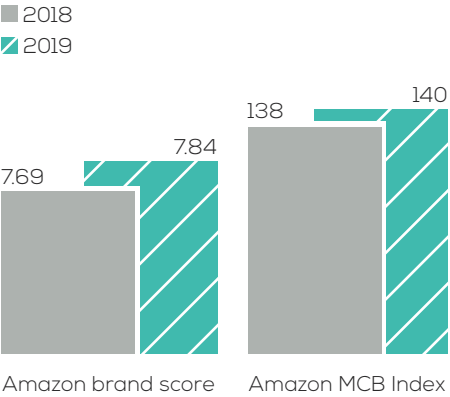
Amazon has always had its fingers in many pies – its AWS cloud services business which started as a mere side project was its main

source of profit for a long time. However, the expansion of these services over the past 12 months has made it increasingly moot as to whether the company can still be legitimately considered 'a retailer'.

While the company has never spent significantly on above-the-line advertising for its retail services, it is telling that its rolling 12-month ad spend increased more than 40% between June 2018 and June 2019. This was driven in large part due to ongoing campaigns for Amazon Prime Video in the increasingly heated battle for market share among TV-on-demand providers. Indeed, in the crucial pre-Christmas period of November and December ►

amazon

Amazon has consolidated its position at the top of the Most Connected Brands index

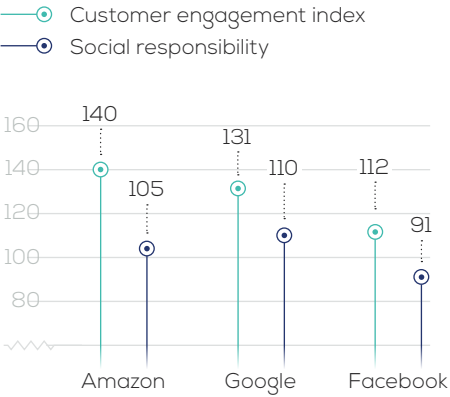


2018, the company spent more on advertising its non-retail services and products – including Amazon Prime Video, Echo, Fire, Kindle, Alexa, Ring – than it did on its retail services.

Despite this focus on digital services, consumer perceptions are sticky. When the company started selling CDs and other entertainment products in the early 2000s, it took a long time for consumers to fully shake off the perception that it was (mainly) an online bookshop. Similarly, our research shows that despite its marketing activity, consumers will still return to the perception that the company is an online shop, first and foremost.

The stubbornness of perceptions is a challenge for the company in other ways too. Like nearly all tech giants in our list, Amazon achieves its lowest score in our social responsibility metric.

Major tech brands significantly underperform on perceptions of social responsibility



While it may be providing many services, consumers still fault its behaviour as a retailer first and foremost. In particular, the company has not been able to shake off the perception that it is killing local high streets and employing people in poor conditions in its fulfilment warehouses.

Nonetheless, as Amazon reaches further into different parts of consumers' lives – and finally starts to turn its years of revenue growth into consistent profits – perceptions of the brand will inevitably broaden. If the company wishes to retain its title in years to come, it will have to develop and execute a brand strategy that is able to fully encompass this sprawling portfolio while retaining the clear and compelling overarching characteristics that consumers value.

When Amazon launched in 1994, our aim was to be the world's most customer-centric company and a place where customers could find and discover anything they might want to buy online.

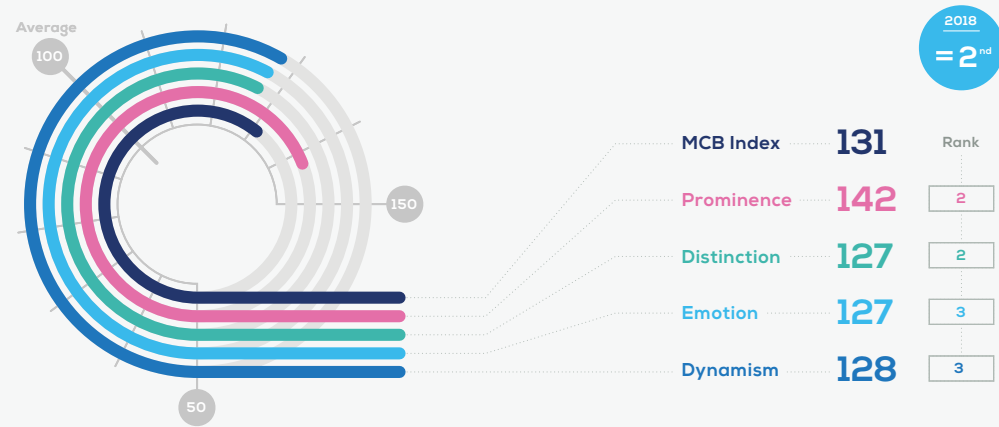
Twenty-five years later, much has changed but our customer-centric mission has stayed the same. We constantly strive for new ways to raise the bar of customer experience by using technology to expand consumer choice and by empowering small businesses and content creators to maximise their success. And this year we are continuing to invest in technology, research and jobs – including 2,000 new jobs, bringing our total UK workforce to 29,500 people.

That's why we're delighted to be recognised as the UK's Most Connected, distinctive and dynamic brand for the second year in a row. By continuing to innovate on behalf of our customers, we hope to ensure that customers continue to feel connected to Amazon while enjoying the range, ease and flexibility of our services.

Doug Gurr
UK Country Manager, Amazon



GOOGLE



Comfortably cutting edge

The most important thing to remember about Google is that the consumers who use the bulk of their services are not their customers. As everybody knows, Google's primary business model is an advertising platform which gathers data on the consumers who use their tools by making those tools intuitive, useful, essential and, above all, free.

A look at how Google scores on our brand attributes illustrates this starkly, over-indexing the most on 'a brand I could not live without' and under-indexing enormously on 'has great promotional offers'.

But is Google at risk of becoming too essential to peoples' lives? Do people now see it as part

of the infrastructure of everyday life rather than a cutting-edge technology company?

For a company that revolutionised the way people find information – and even find their way around where they live – Google scores remarkably low on 'are always looking to push the boundaries', far behind Amazon and Apple. They even fall behind Uber, a business that is basically a taxi company with an app that has yet to break even.

Does any of this matter? While consumers don't see it as excelling at pushing boundaries, the emotional reaction the brand elicits is nothing but positive. 'Inspiration', followed by 'happiness' and 'belonging' are the feelings the

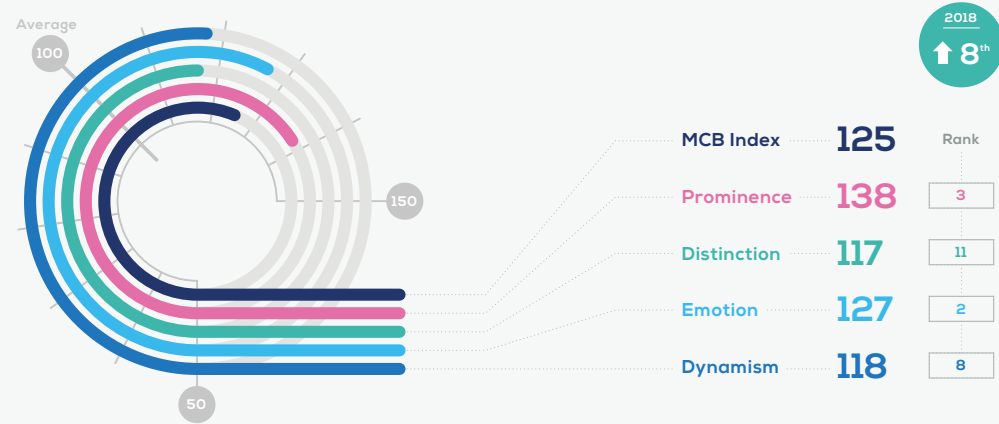
brand strongly overperforms on. 'Sadness', 'disgust' and 'anger' are not associated with Google at all.

Similarly, for all the modern concerns about privacy and use of personal data, 'fear' is also barely associated with the brand. Compare that with the other well known "services in exchange for data" tech company, Facebook where performance on all of the positive emotions is far below Google's while 'anger', 'sadness' and 'disgust' are much higher.

Facebook offers a good example of why Google must make sure consumers don't start to have doubts about the overall "free services in exchange for your data" bargain that they provide. Google overperforms other brands on almost every measure we have (there's a reason it's ranked second overall) but the measure it overperforms the least on is 'social responsibility'. Facebook's controversies since 2016 clearly show up in how much they underperform on social responsibility. But they also underperform against Google in how useful people think their services are. While both companies mine user data to sell advertising, the trade-off offers better value for consumers because Google's products are a more useful part of day to day life than Facebook's. The lesson here (as well as the more obvious one of 'don't allow your brand to become embroiled in political battles') is that brands like Google need to make sure that the bargain works as well for consumers as it does to advertisers.



CADBURY



The sweet taste of success

Last year Cadbury placed in the top ten of our index, sitting comfortably at number eight. This year, the brand has improved on its former position, rising up the ranks to become the third Most Connected Brand with UK consumers. A great result for the only British (definitely still British) brand in the top five of our Index.

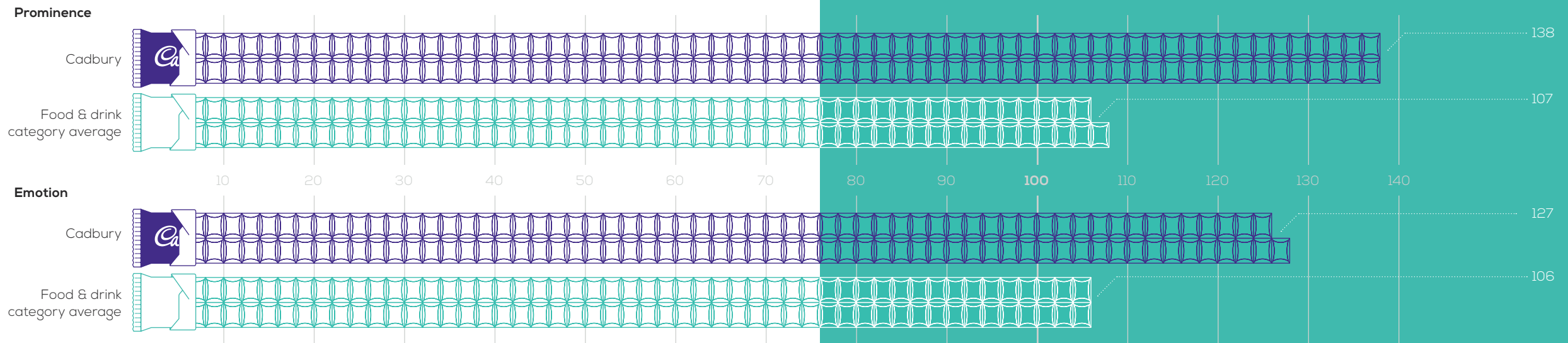
Cadbury's number three ranking is due to a strong performance in Prominence as a top of mind brand and the emotional connection it has developed over time with consumers.

In relation to brand imagery, Cadbury achieved the highest score in the top 100 for 'a brand that makes me smile'. Along with the natural grin-inducing reaction to eating a Dairy Milk, the continuous light-hearted advertising from the brand, with entertainment at the core, will have certainly contributed to the result. The brand also over indexed on being an 'iconic brand' – unsurprisingly so, we can recognise that purple or **Pantone 2685c**, to be exact, anywhere.

Buzz (i.e. currently hearing a lot about the brand) was another area the brand achieved ►



The Most Connected Brands 2019



a strong score for. Much of what we've all heard in the years since Kraft acquired the company has centred around the Americanisation of British chocolate, threats to UK jobs and most recently, the sugar tax and the taste effects on traditional Cadbury recipes. However, the confectioner has continued to balance out the corporate murmur and engage the nation with controversial collaborations (Crème Egg Heinz Mayonnaise anyone?) and flavour fusions with other sweet favourites such as Oreo and Daim to refresh the traditional staples.

On the topic of engagement, TV advertising has taken a sentimental direction for Cadbury in the last couple of years. The most recent example celebrates the relaunch of the brand's biscuit portfolio under the title 'Cadbury's Baked In'. The heart-warming advert centred around the generosity in sharing Cadbury Chocolate Fingers, showcasing Cadbury as a brand that brings people together, sharing experiences and building connection.

Cadbury's score for social responsibility and being a brand that 'puts people before profits' were relatively average in comparison to the other brands in the top 100. However, just recently, Cadbury has for the very first time removed all the wording from its Dairy Milk packaging and 'donated the words' to Age UK to help combat loneliness in older people. The proceeds from the limited-edition chocolate

bar will help to fund crucial services and care to those who need it most. Such activism from a brand of Cadbury's stature will no doubt resonate strongly with consumers who are increasingly more inclined to support brands that support causes. It will be interesting to see if Cadbury continues such favourable acts of social responsibility and the subsequent impact on consumer perceptions of the brand.

Think chocolate, think Cadbury. Think Cadbury, think chocolate.

Cadbury is an iconic brand that we've all grown up with and enjoyed at some point in our lives; from Christmas selection boxes to Easter eggs to Mother's Day treats and everything in between. Who can forget their first memory of a Cadbury crème egg – how did you eat yours? Whether you're six, 16 or 60, if you're having a good or a bad day, if you're celebrating or commiserating – Cadbury works wonders, literally.

Created in 1824 and formerly known as Cadbury's, then Cadbury Schweppes and now owned by Mondelez International, it has successfully tapped into the emotional psyche of consumers by deploying a number of broader marketing strategies which has included using a host of celebrities in its television ads. And who can forget some of those eye-catching ads that have gone down in marketing folklore, albeit now seem dated.

Today the world's second largest chocolate brand, which was first granted a royal warrant in 1854, is evolving in order

to not only remain relevant to its audiences of all ages but to respond to the changing needs and desires of society. The rallying call to tackle obesity continues. Similarly, to other FMCG food and confectionary retailers, Cadbury isn't the only brand facing pressure about sugar content in its products. In response, it reduced the amount of sugar in its Dairy Milk by 30% which went down a treat.

The brand is now facing a renaissance as it attempts to deepen the emotional connection by physically involving consumers so they in turn feel involved and part of the Cadbury story. The Annual Inventor competition, now in its second year, is a clever example of this. Whilst not an entirely original tactic, it's one that has traction and resonates. Who doesn't want to become a Willy Wonka.

And its 'Build Your Own Chocolate Christmas Cottage' puts the fun back into chocolate – who doesn't love getting chocolate on their hands.

The word 'purpose' can be overused in communications but it's one that works for Cadbury. Just think of the recent Dairy Milk 'Donate Your Words' campaign in partnership with Age UK; created to encourage people to take time out to speak to the lonely elderly. A concept that goes to the heart of our society and strikes a chord, even with the most hardened of people. This is Cadbury at its best, going back to its Quaker roots. The campaign is a stroke of genius with 30p from the sale of each bar donated to Age UK. It continues to bank on its heritage as a family brand.

While Cadbury may not always get it right in every country and it may now be owned by a multinational, it fundamentally remains a British favourite that has stood the test of time.

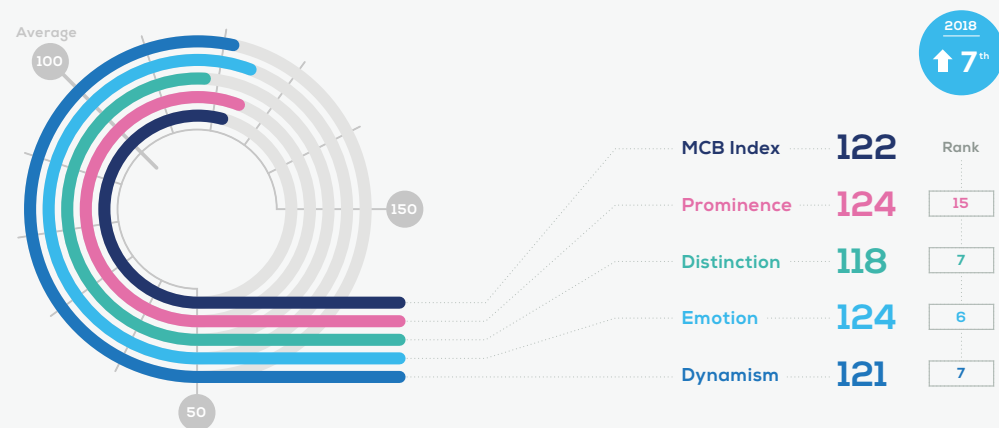
'Thank You Very Much' Cadbury.

Beverly Aujla

Director, Lansons



SAMSUNG



Doing the impossible

Samsung has shot up the UK Most Connected Brand ranking in 2019 to fourth, a rise of three places. Even more encouragingly they have overtaken their smartphone rival Apple, which now lie in 14th place – a fall of nine places.

A solid allrounder, Samsung has few discernible flaws as brand in the eyes of consumers; either maintaining or improving since 2018 across all our metrics, with particular improvements in Prominence, Popularity, Connection and Setting Trends. These latter two metrics are kingmakers within the technology category, with the ever-advancing personalisation and innovation of products and services cornerstones of established tech Goliaths and start-up's alike. With Apple's success

last year in our ranking due to its reputation for delighting consumers with sleek design and innovation, its decline in these metrics illuminates how Samsung's improvements have contributed to its rise up our rankings.

Samsung comparison scores

Emotion ranking

2018 9th 2019 6th

Setting trends ranking

2018 9th 2019 6th

So, what has Samsung been up to this past year to elicit these changes in perception?

Arguably the reception to its latest line of Galaxy and Note phones has been muted, with expert reviews highlighting the lack of breakthrough innovations seen in the latest Google and Huawei camera technology, whilst nonetheless praising the incremental improvements in design and hardware. A similar story exists in Samsung's other core consumer categories; TVs, laptops and household appliances such as fridges and washing machines: high performing products no doubt, but by no means ground-breaking.

However, success isn't purely driven by product innovation and where Samsung have excelled is how it communicates its' purpose to consumers. Samsung have adopted a

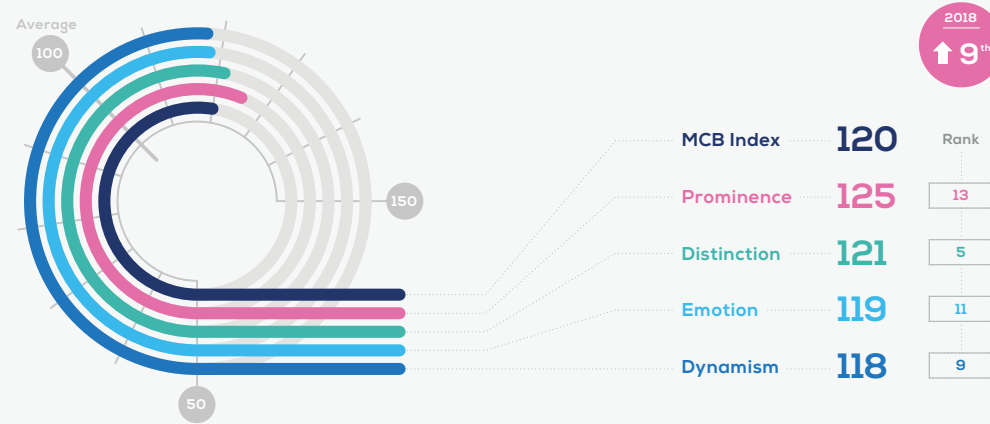
human-centred communications strategy, which focuses on how technology can help people excel and connect with others in their personal and professional lives.

Their flagship brand advert dubbed "The Future" encapsulates this approach, showcasing their vision of the relationship between technology and people. The use of virtual and augmented reality in this advert alongside forays in folding phones (functionality issues aside), as well as their QLED TV technology will have helped to cement sub-conscious consumer perceptions of innovation.

We see these perceptions reflected in our data, with emotions such as love, happiness, belonging and security all strongly associated with the Samsung brand.



EBAY



Thriving, not just surviving

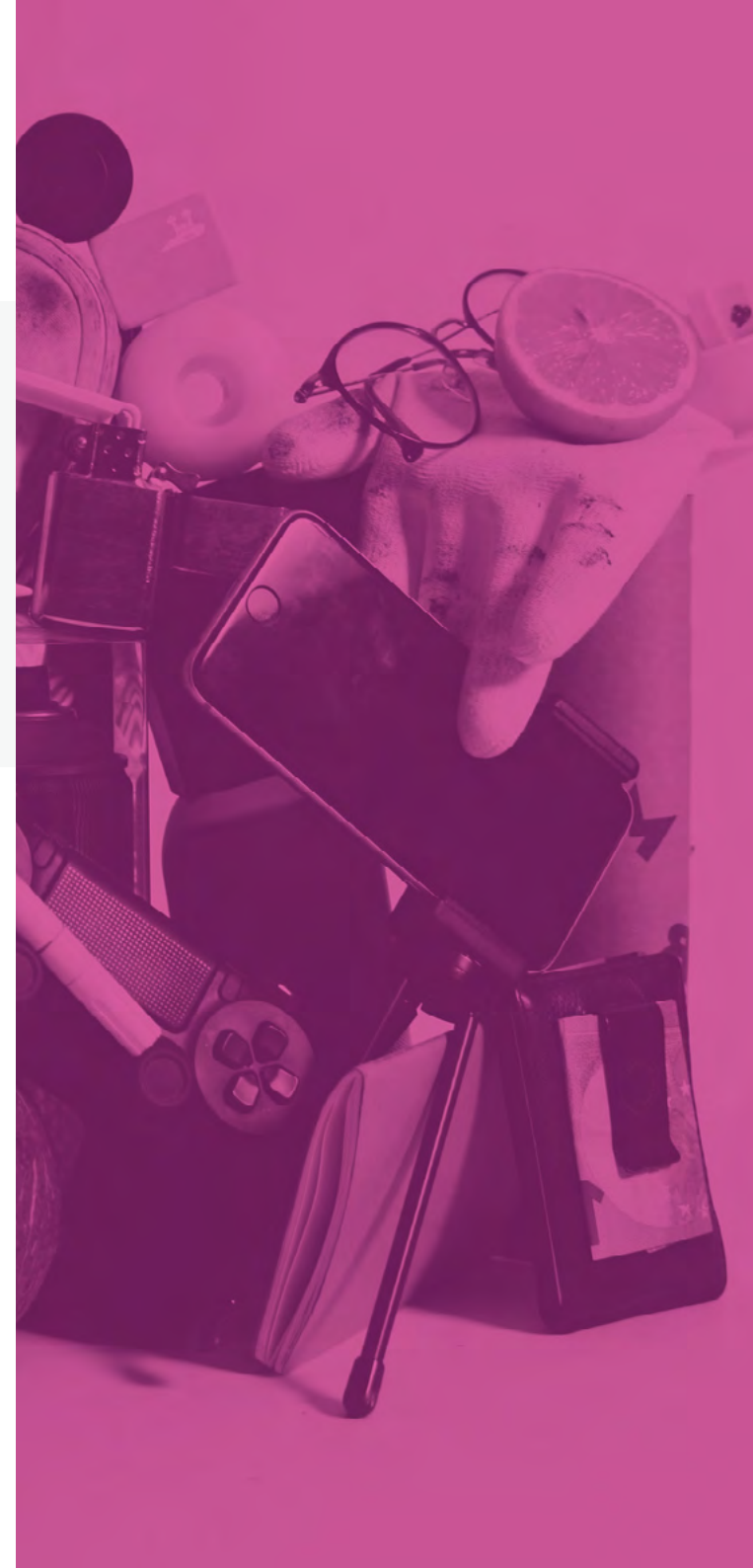
In the past 12 months, over 1,300 new businesses generated more than £1million of sales using the eBay marketplace.

Speaking to the BBC, Rob Hattrell, eBay's vice-president in the UK said: "The uplift in the number of eBay millionaires demonstrates how entrepreneurs up and down the country are keeping up with the ever-changing needs of consumers, despite some tough economic conditions".

Yet it is arguable that it is not despite, but actually because of, these economic conditions

that eBay is thriving. Propelled from ninth in 2018 to fifth, the tech giant scores consistently well across all four Most Connected Brand measures, but it is the ubiquity of its offer combined with its prominence in the market that is driving connection in 2019.

Yes, eBay is understood to offer value for money. Yes, eBay is recognised for the strength of its promotional offers. And yes, eBay performs strongly in terms of offering great products or services – all of which are undisputedly key drivers of choice in uncertain times.



But consumers want more from brands than simply a cost-effective way of fulfilling their needs. They want to connect with brands which are representative of their lives, whoever they are, whatever the economic, political or social circumstances, and it is here that eBay thrives. Twenty-four years after the platform was founded eBay is not only recognised for its ability to cater to diverse groups of people, but also to represent 'someone like me'. It's a fine line, but eBay succeeds because its offer is fundamentally dependent on people being able to buy and sell individual, often personal, items on an unprecedented, global scale.

Although detractors may therefore argue that the brand has perhaps lost some of the innovative, challenger sheen of the dot.com bubble – with only 18% of respondents viewing eBay as 'always looking to push the boundaries' –, the future nevertheless looks bright for the tech platform. Increasingly environmentally conscious consumers seeking to reduce, reuse and recycle mean that eBay has an opportunity to once again be at the forefront of a significant social movement which allows people to thrive, not simply survive in uncertain times.

Let there be life

It's tricky being a retailer right now. Traditional retailers with the clock running down are desperately trying to get online match-fit. Online retailers fending off an inexhaustible set of competitors are frantically trying to assimilate decades of physical retail secrets in order to thrive and survive. Phygital retail is the future, they all believe. It's a race to the middle.

Plugging away in the midst of all the chaos is eBay. Quietly going about its business of being the world's largest online marketplace.

eBay shouldn't work. The merchandising of goods is below-par. Quality is unknown until arrival. Nothing turns up when it's supposed to. The delivery experience will never be worthy of an un-boxing video. Returns are impossible; confrontational even. Trust is shaky at best.

Yet it ignores the pressures of Amazon and the benchmark it sets for digital retailing. There will be no purchases made in fewer than 10 clicks. And it stays stoic in the face of Argos and its impressive standards of physical retailing. Collect in store

today? Ha! You will have to wait days, maybe weeks.

eBay, not for these reasons, is refreshingly old-fashioned. The brand's success in communications has been to stay true to what consumers love about the brand – choice, value and discovery. And to keep its product truth firmly at the core of its advertising.

Fill Your Cart With Colour is the very truthful, very relatable brand platform. It is a celebration of its sellers and buyers. It flatters their need for self-expression and individuality but at the same time it's a message with relatability and scale. It is a useful, universal truth. Because who doesn't want to be different?

It would be easy for eBay to lock onto the trend for brand purpose. You can imagine the brand line Recycle The World. It is tempting and highly credible. But to do so would be to put brand vanity before the primary user motivation.

Keeping stuff out of landfill is a side benefit. What really

matters is finding unique stuff for an unbelievable price. Or, offloading questionable possessions you no longer want and getting a few quid to add to the holiday fund. eBay's emotional brand power and connection comes from keeping its product truth and product benefit central to its brand storytelling.

But whilst that might be refreshingly old-fashioned marketing, its creative execution is anything but.

eBay is rightfully one of the (UK's) Most Connected Brands.

Their recent campaign If It's Happening In Your World, It's Happening On eBay is a very contemporary take on an old fashioned retail message (choice). The campaign invites you to make the connection between contemporary culture and eBay. eBay is not a retailer studiously keeping on top of fashions and tastes. eBay is a mirror held up to culture and is what its users make it. There can be no greater symbiosis between a brand and its audience and therefore no greater emotional connection. The message is eBay is people. eBay is life.

Lisa Gulley

Planning Director, Red Brick Road

The original disruptor comes of age

The original disruptor of the e-commerce world, eBay has come of age – but it's still shaking up traditional retail with a global marketplace that welcomes big brands, empowers entrepreneurs and serves 27 million customers a month in the UK alone.

eBay was the first online marketplace. Today, it's a household name. A regular feature in lists of best loved brands, it connects millions of buyers and sellers, helping customers to find the item they're looking for from its 1.2 billion listings.

With buyers in 190 markets, trade is fast. The 2018 World Cup had us bringing home a waistcoat a minute in July due to Southgate fever and eBay reported nearly two searches for 'Chesterfield Sofas' every minute following the debut of BBC One's hit TV show, McMafia. This incredible interest directly benefits the small businesses who trade on eBay, giving them access to an audience once unthinkable for a small shop on the high street. Unlike other online platforms, eBay does not compete or undercut its sellers.

Whether an item is new, luxurious or rare, fashionable or one-of-a-kind, it's probably for sale on eBay.co.uk. The brand's mission is to be the place where the world shops first, and a continued focus on its powerful search gives strength to that promise.

While eBay remains true to its marketplace roots, 89% of the items for sale on eBay are now offered at a fixed price and 80% are brand new. The UK's big retail brands also continue to gravitate towards the marketplace, setting up their own eBay stores to be where British consumers are shopping.

All sellers on eBay benefit from one of the most popular mobile apps in the market – downloaded more than 440 million times and counting – along with a ready-made web presence that is fast, mobile and secure.

Throughout its 23-year history, eBay has helped many thousands of small businesses to succeed. Small British firms regularly rank in the top five grossing sellers on eBay.co.uk's

biggest trading days like Black Friday, and over a thousand British sellers who started with a shop on eBay are now running million-pound businesses, providing jobs to people in their communities.

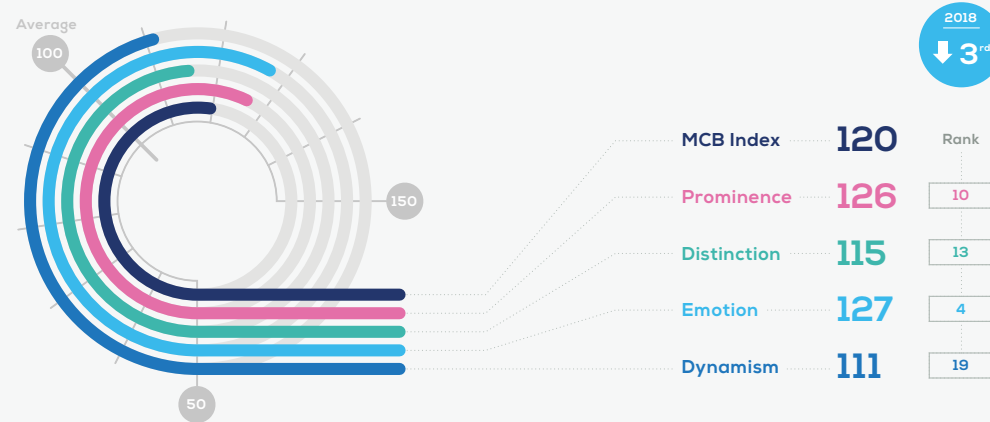
Each year eBay champions the best of its sellers through the eBay for Business Awards: a nationwide hunt for the best and brightest innovators on the marketplace. As a hub of retail in the UK, the marketplace also continues to welcome top brands to the site – including Adidas, Currys, Halfords, Canon, Jigsaw and more.

eBay's vision for commerce is one that is enabled by people, powered by technology and open to everyone. eBay focuses on providing opportunity for all, allowing charities, businesses and individuals to participate in – and benefit from – global commerce. This is bolstered by eBay for Charity, allowing people to easily support their favourite charities when buying and selling.

EBAY UK



HEINZ



Heinz means more than heritage

Heinz retains a spot in the top 10 Most Connected Brands ranking, although it has dropped three places from last year and is surpassed by Cadbury as the number one FMCG brand.

The Swiss army knife of the kitchen, however, is in rude health. Celebrating its 150th birthday, Heinz is a brand that consumers know they can rely on, and do so time, and time again.

That is very much a feature of our data with Heinz ranked one of the brands with which consumers are most familiar.

It is also ranked joint second within the FMCG category for Emotional connection. Heinz may not have the buzz of brands like Google or Apple, however, it is no less of an iconic brand. More people could live without an Apple product than one from Heinz, illustrating the strength of the product portfolio united under the Heinz banner.



Social responsibility is an area which continues to become more and more important for brands to address as consumers become increasingly aware of the importance of these issues and the power their purchases have to enact social change. From the food and drink brands in our top 100 only PG tips & Cadbury perform better than Heinz on social responsibility.

When Kraft Heinz was formed in 2015 corporate citizenship and sustainability were prioritised. The organisation's vision of "Growing a better world" by working to improve the planet, people and the communities where they work and live remains central to its efforts. Key initiatives have focused on the environment, palm oil, animal welfare and human rights.

Clearly Heinz is a brand that has managed to embrace its heritage and deep-seated consumer love with the demands that modern society places on the brands. Who's up for another 150 years of beans on toast and ketchup on your chips?

150 years of uncommon success

Heinz is one of the most loved and trusted brands on supermarket shelves, a reputation that has grown through generations of enjoyment of Heinz varieties. Testament to this enduring popularity is that Heinz is celebrating its 150th birthday this year. Heinz shopping basket essentials are as relevant today as when they were first sold in London's Fortnum & Mason and have become part of the national diet, offering mealtime favourites for everyone.

Heinz has long held number one positions in key grocery categories, underpinned by exceptionally high-quality standards. These include Heinz Beanz, Heinz Cream of Tomato Soup, Heinz Tomato Ketchup and Heinz Salad Cream. The popularity of Heinz in the UK is illustrated by the fact that 88% of households buy at least one Heinz product every year and

the average UK household purchases a Heinz product more than 13 times per year.

Driven by consumer insight and our innovative culinary skills, Heinz has also invested in bringing new recipes and pack formats to the market including microwaveable Snap Pot Heinz Banz and Pasta; Seriously Good Mayonnaise, Soup of the Day, microwaveable pot soup and reduced salt and sugar Heinz Tomato Ketchup.

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.

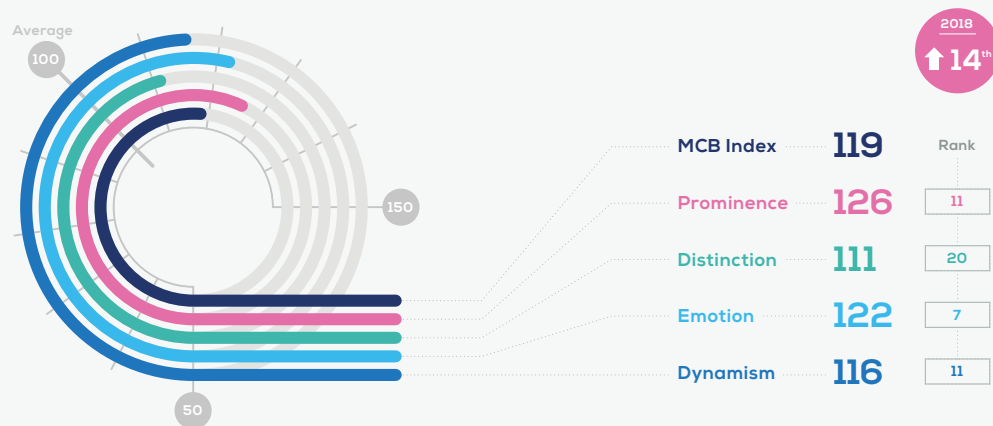
As Henry J Heinz said himself: "To do a common thing uncommonly well brings success".

Colin Haddley

Director of Strategy, Insight, Capability & Marketing Services,
The KraftHeinz Company, EMEA



WALKERS



Extra crunch

Walkers are another of this year's movers and shakers. Up seven places from 2018, they come in a significant 10 places ahead of the next food and drink brand: Coca-Cola.

Both Walkers and Coke trade heavily on audio/visual cues to remain omnipresent in the minds of consumers; the rustle of foil and subsequent crunch of eating crisps is almost as ubiquitous as the sharp 'pssst' of a fizzy drink being opened. Although neither of these sounds are unique to either brand, when used in combination with truly distinctive assets, such as the Walkers logo and the continued relationship with Gary Lineker, you've got a recipe for prominence.

Whilst being top-of-mind is crucial in the FMCG sector, the secret to Walkers success this year has been their doubling-down on connection with consumers. The brand is highly associated with the feelings of comfort and happiness, illuminating the surprisingly emotional role that crisps play in the life of an average Brit.

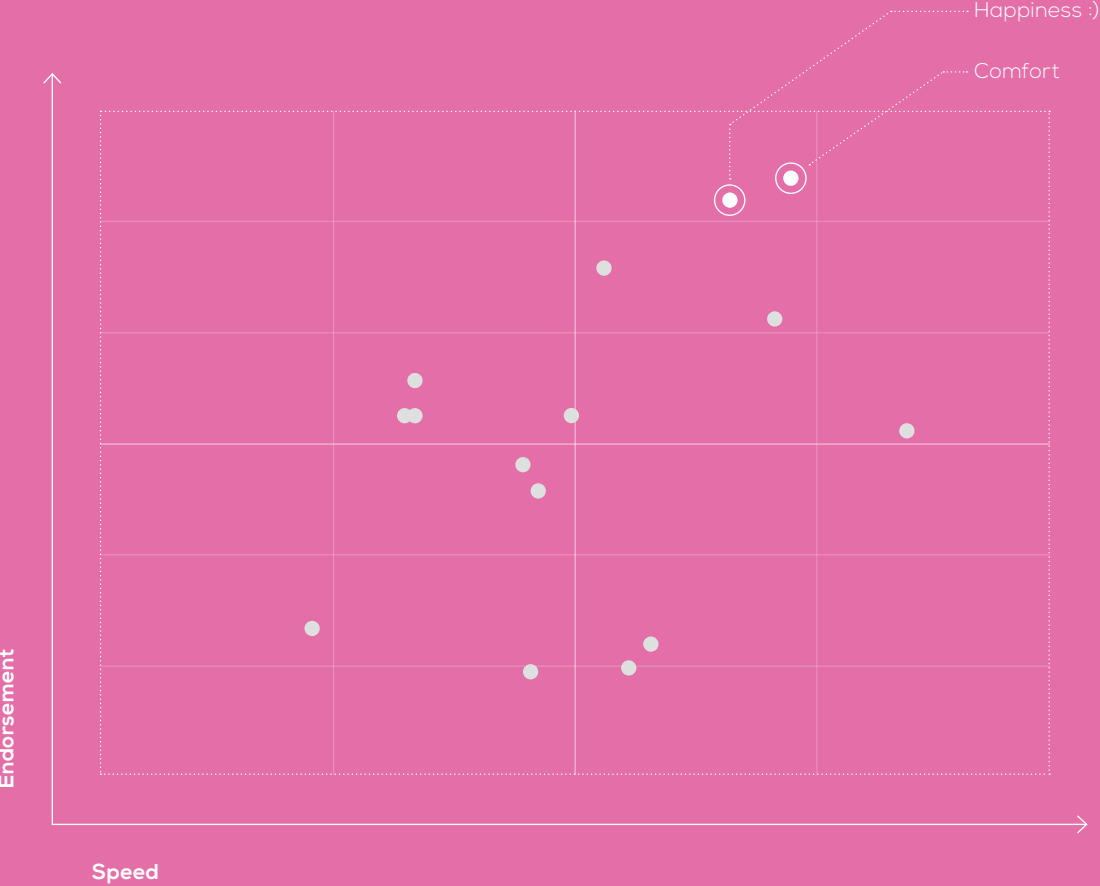
Walkers have managed to cement these emotions by delivering happiness in the form of competitions to win tickets to see the Spice Girls and creating comfort in a troubled nation by emphasising its 'Great' British potatoes and installing famous landmarks from throughout the UK on its packaging. These two core emotional pillars shine through the brand's ▶

marketing strategy and has fostered the notion that it is a 'brand people couldn't live without'. Combined with the perception that they have 'great promotional offers', it's little wonder they are one of the top brands that people say make them smile.

Looking to the future, Walkers is not without its share of challenges. Trading in a sector increasingly under environmental and ethical scrutiny, Walkers needs to be wary of the fact Brits don't see the brand as putting

people before profits or particularly inclusive. Investments such as launching a recycling scheme for used packets of crisps and pledging to ensure all packaging is recyclable by 2025 will go some way in sedating these opinions. However, as brand purpose proliferates the FMCG world, they will need to continue to commit to corporate responsibility initiatives if they want to keep connected to the British public.

Walkers emotional response map



Walking on sunshine

Every time the sun comes up, Walkers produces 11 million packs of crisps. The brand doesn't just dominate its rivals, it crushes them – selling four times as many as own label or McCoy's.

How has Walkers become, and more impressively remained, both the out-and-out leader and one of Britain's best loved brands? In a word: relatability.

A fat slice of the population relates to and connects with Walkers. Why? Because crisps are an integral part of popular culture. The average Brit eats 150 packets a year. They literally make us, us. Snacking and grazing have elbowed-out sharing and dining. And with every meal a picnic, it is crisp-o'clock all day long.

And Walkers haven't stood still. They have stretched the brand judiciously to build a sunny family of sub and endorsed brands, including 'extruded snacks' like Doritos and Wotsits. But it is surely their readiness to adapt its heartland products playfully that makes Walkers stay special. Becoming generic can spell doom

for category champions (remember Ski yoghurt?)

Walkers has dodged that bullet by balancing strategic consistency with tactical variance. It doesn't mess with its core brand assets, but at the same time is responsive and topical. The 'Do us a flavour' initiative is a cracking example of customer engagement and testing the boundaries of brand and taste. Cajun Squirrel anyone? Not everything has gone smoothly. The Walkers Wave activation campaign was overwhelmed by a tsunami of trolls.

Perhaps mistakes have amplified the relatability of the brand. Nobody's perfect after all. Not even gorgeous Gary, the silver fox. Sticking with Lineker feels to me to be a masterstroke. I'd guess that only a small minority of munchers know about the Leicester legacy that set up Lineker as the brand spokesperson. And fewer still know about his unblemished disciplinary record that underpinned the Nice Guy persona. Mr Salt 'n' Lineker may now be more known for his banter and peppery tweets than his goalscoring, but just as Lineker

remains an everyman and a millionaire – so the brand is both accessible and superior.

Is success sustainable? The sector shows some movement towards perceived "healthier choices" like popcorn. Healthier? What is Generation XL learning in school these days? And whilst the public at large might not be turning their backs on snacks, surely a responsible business faces up to the impact of its products? A 'naughty but nice' brand personality is no substitute for promoting poor choices about diet.

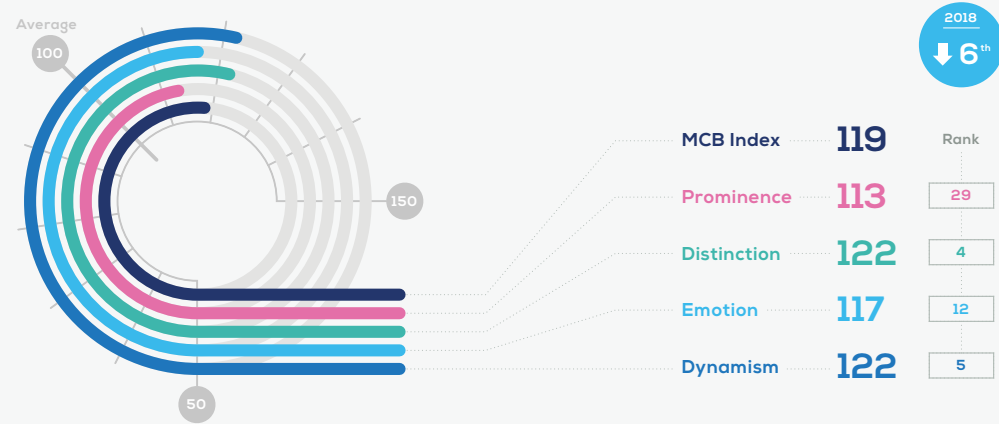
So, it might be time for the brand, at 70, to show more maturity. Brits love to think that "It's only a bit of a laugh" and the brand's relatability rests on its light-heartedness. But the nation has sleepwalked into a heavy-weight obesity crisis, propelled in part by the meal deal and the unholy trinity of butties, crisps and pop. PepsiCo is committed to 'Performance with Purpose' and will shift towards healthier and more nutritious products. That's a good direction of travel. My advice? Run, don't Walk!

Alec Rattray

Consultant



YOUTUBE



Still tuned in

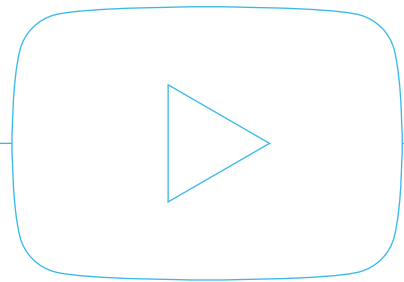
YouTube presents a challenge for brand analysts in that their competitive set is hard to pin down. There are other websites that allow you to create a profile and upload videos for others to see, but none of these websites were chosen by consumers to be part of our top 100 Most Connected UK brands.

In terms of reach for video content, YouTube's closest competitors in our list are arguably streaming services like Netflix or more traditional broadcasters with an online presence like the BBC.

But YouTube's combination of user generated content and widespread reach is unique and that brings enormous benefits as well as huge challenges.

The sheer variety of content available means that YouTube can produce the kind of tailored, emotionally rewarding experience that most brands would kill for. In our metrics, YouTube matches Netflix for 'caters to diverse groups of people' and 'represents someone like me' while beating all others on being a brand that 'makes you smile'. The emotions each brand





brings to mind support this as well. YouTube outperforms Netflix on 'happiness' and scores comparably to Netflix and the BBC for 'amusement'.

The downside of hosting rather than producing all of the content on your platform is that it leads to a loosely regulated environment where, unlike Netflix or the BBC, the overall brand has less control over what is shown on their platform. The sheer amount of content and the automated systems which choose which videos to promote can lead to unintended side effects and there is a reason why no other brand has an equivalent of YouTube's "extremism problem".

Put simply, YouTube's suggested videos algorithm is designed to ensure people spend

more time watching YouTube videos by recommending content they are likely to watch through to the end. The problem, as everyone knows, is that the factors that make a video compelling to watch seem to have an inverse relationship with whether or not the video is truthful and accurate. The videos most likely to guarantee a person stays on YouTube tend to evoke emotions like fear and anger which correlate strongly with conspiracy theories and far right extremist content. There are numerous examples of people watching an uncontroversial video before being directed down the rabbit hole towards more emotionally engaging (and extreme) content, a form of

Godwin's law in which, as a person spends more time on the site, the chances of being suggested extremist content approach 100%.

This has already had an effect on the bottom line with concerns about extreme content prompting some advertisers like Mars, Diageo, and Sky to scale back or even cut spend completely.

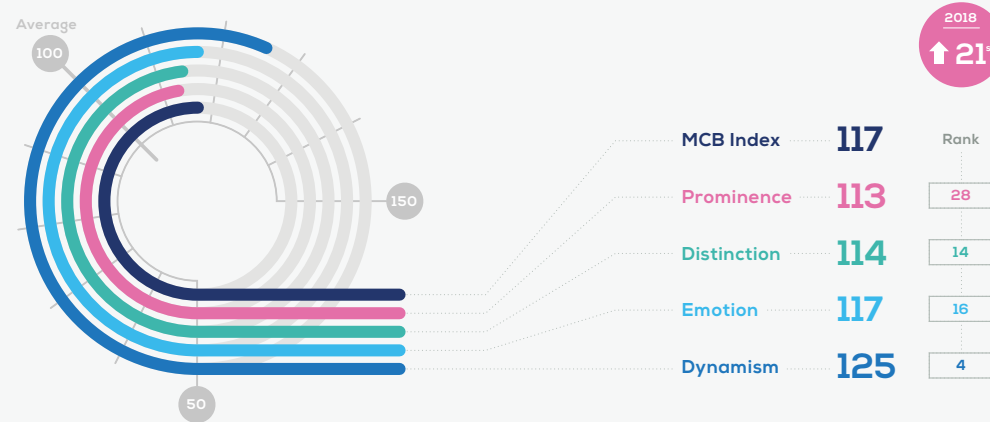
However, the good news for YouTube is that, so far, the issue has not dented perceptions of the brand. YouTube's role in recent political events has not been as controversial or well publicised as Facebook's and this shows in how the two score for 'social responsibility'.

Facebook underperforms significantly here while YouTube has a similar score to Netflix and a few below that of the BBC.

YouTube's challenge therefore is to get the extremism problem under control before concerns cut through from tech circles to the general public.



ALDI



Front and centre-aisle

Aldi has had an impressive 12 place climb from last year's ranking to claim the number nine spot in our Most Connected Brands UK Index this year. What's more, the grocer is now the highest-ranking supermarket, overtaking Tesco who claimed the supermarket top spot last year. Aldi's promise to deliver quality produce at affordable prices has naturally resonated with consumers, scoring the highest in our index on 'value for money' and providing 'great promotional offers'. The latter scoring three times higher than the average endorsement for the statement. With that level of validation,

the brand is certainly hitting the right notes with consumers and it's therefore unsurprising it's been a record-breaking year for the discounter. Aldi reported its highest ever sales for the Christmas and Easter periods this last year, suggesting the supermarket is becoming a seasonal staple for grocery shoppers.

The supermarket's popularity has traditionally been most prevalent in older shoppers, aged 50+, who on their own would have placed the discounter as the fifth Most Connected Brand. However, with the launch of a number of Aldi ▶

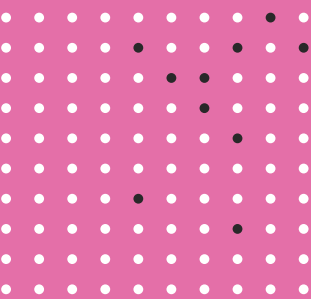


Supermarket rankings

MCB Index ranking

9 th	ALDI
15 th	TESCO
18 th	LIDL
20 th	MARKS & SPENCER
26 th	SAINSBURY'S
27 th	ASDA
37 th	MORRISONS
48 th	ICELAND
65 th	CO-OP
78 th	WAITROSE & PARTNERS

Where supermarkets sit in the top 100



Local stores in London earlier this year, the convenience and experience of the discount supermarket will likely to lead to increased popularity with young people living in the capital looking for easy ways to save.

However, it's not only the cost-saving aspect of shopping at Aldi that many find appealing. Social responsibility and sharing 'values or ideals you can relate to' were other elements that the brand performed particularly well on. Whether this is reducing its carbon footprint, ensuring there is honesty and integrity in their supply chain or sourcing produce from local farmers, the brand is saying and doing all the right things to build connection with consumers.

Grocery market share has been a growing topic of conversation in the retail world since the German discounters started building consumer momentum and overtaking the long-established British competitors. Now, with only 1.9 percent difference in overall market share, it may be only a matter of time until Aldi overtakes Morrisons and breaks into the 'big four' supermarkets.

From the mystery of the 'middle aisle' to the copycat brand alternatives and the high-quality grocery items that sometimes seem too good to be true, Aldi has set new expectations for shoppers and thus redefined the supermarket category.

Everyday amazing for everyone

As a discount supermarket with a clear focus on value, quality, range and provenance, our customers are at the heart of everything we do.

We opened our first UK store in 1990, and from there we have grown to become the fifth largest supermarket in Britain. Our business approach is long term and is based on our three core values; consistency, simplicity and responsibility.

Now with over 830 UK stores and more than 32,000 UK colleagues, we offer an award-winning range of carefully curated, high quality products. Our commitment to price leadership continues to attract hundreds of thousands of new customers through our doors every year.

Our core range of fresh produce is offered at a 40%+ discount through our Super 6 initiative which refreshes every fortnight; while our 100% British core range fresh meat is reared to Red Tractor standards. We make sure our range matches the very best brands in the market and in 2018, we won more than 400 awards for the quality of our products.

We are confident that when like-for-like products are compared, we will never be beaten on price and the average price per pack of Aldi products remains the lowest in the sector. This means that all Aldi customers can access fresh, quality food at affordable prices.

Our credentials are the best in the business. In the last year, we have prevented over 2,800 tonnes of food from going to landfill and secured a 'carbon neutral' status following investments in green technologies

and energy efficiency. In 2019 we partnered with Neighbourly to donate surplus food from our stores across England, Scotland and Wales, helping to support the communities where we operate.

We're proud that our core values are at the heart of everything we do, whether it's backing British farmers through the NFU's Fruit and Veg Pledge or educating children on the benefits of fresh food with our Get Set to Eat Fresh campaign. Our aspiration is to leave a lasting legacy for future generations.

We offer amazing quality products at unbeatable prices - facilitated by a lean business model, an Everyday Low Pricing mechanic, and a sustainable supply chain.

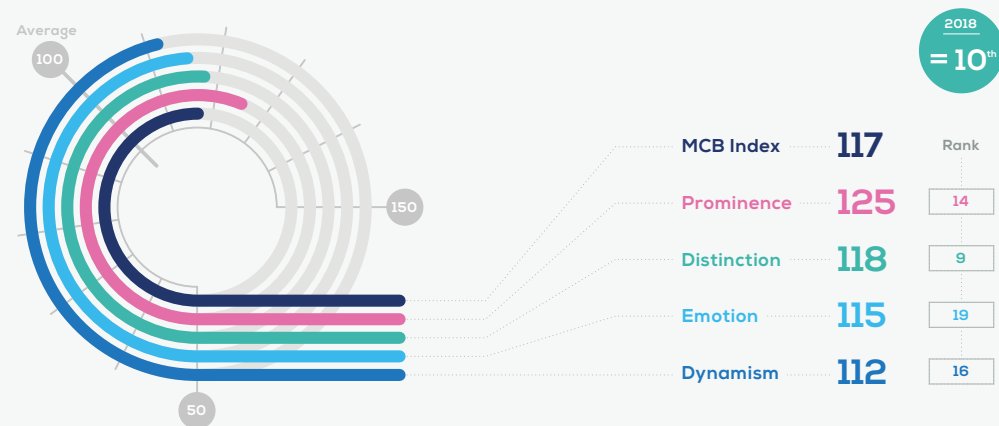
We are driven by our founder Karl Albrecht's vision:

"Access to fresh, healthy, affordable, good quality food is a right not a privilege."

ALDI



MICROSOFT



Keeping the standard set

Microsoft has retained its place within the list of top 10 Most Connected Brands in the UK, which is no mean feat, especially in the realm of large multinational tech companies where competition is fierce.

It's been a good period for the corporation in relation to its main competition: last year Microsoft overtook Apple in value for the first time since 2010, and in April of this year it became the third US company to be valued at over USD\$1 trillion. We have also seen Apple fall out of the UK top 10 while Microsoft maintains its 2018 ranking. But what is it behind this success?

Ultimately, Microsoft isn't perceived in the same way as its main competitor. Its brand equity is not bound up with it being an extraordinary innovator and driver of change, but in something a bit broader.

Key is Microsoft's relatively strong score on connection. While technology brands more generally have a slightly above average score on Emotional connection (102), Microsoft has a score of 115. Ultimately, its long-time place as the market leader of home computing means that it holds a strong place in consumer's hearts that other brands can't quite reach: 65% associate security with the brand, while 50% also associate Microsoft with hope.



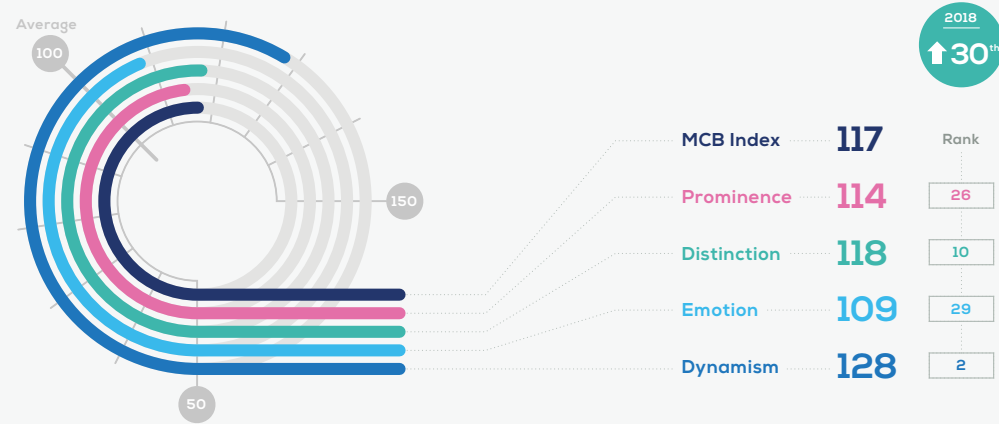
The role it has played in providing usable and accessible personal computers for decades ensures it is now seen by the majority of the UK population as a key part of their lives, regardless of whether they are younger or older. Not only is the brand perceived to offer great products and services (51%) and understands what is important to them (30%), but just under a third (30%) also think that they cannot live without the brand. This strong performance, especially on being perceived as a necessity, puts it in a league of brands that are simply seen as indispensable by consumers.

However, this isn't to say that Microsoft doesn't also succeed in many of the places that tech brands tend to. Microsoft overindexes in being viewed an iconic brand (59%) and in being seen to push the boundaries (36%).

Whilst the brand is not perceived to be quite as innovative as its main rival, Apple, Microsoft continues to be seen to push the boundaries and to benefit from a broader base of engagement from consumers. Unlike Apple, which performs best amongst under 35s, the generational divide in perceptions of Microsoft are much smaller, providing the brand with a less narrow and potentially less fickle foundation of support from consumers.



NETFLIX



Stream if you wanna go faster

Netflix has jumped up the ranks significantly this year, now sitting just outside the UK top 10 and is the highest placed media and entertainment brand in the ranking. And if those under the age of fifty had it their way, it would have hit the top five.

MCB Index ranking by age:

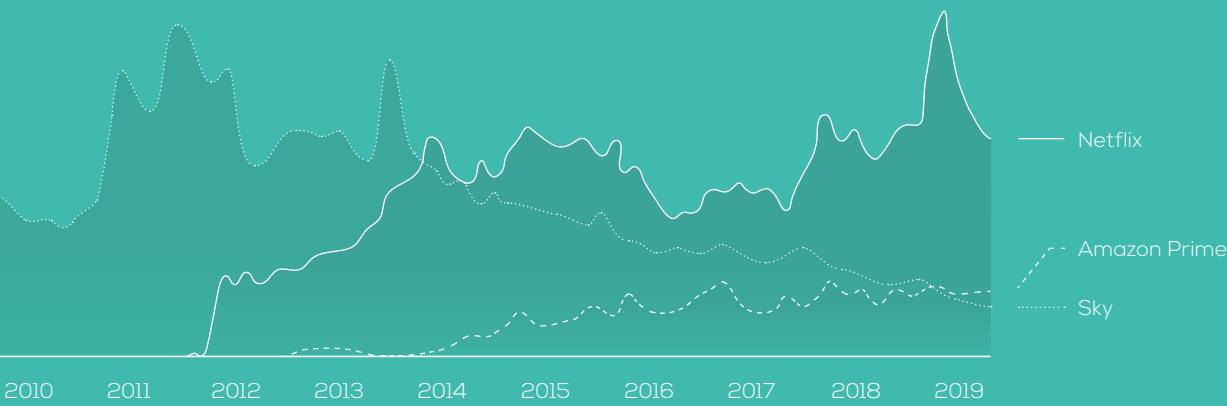
18-34s	4 th
35-49s	3 rd
Over 50s	34 th

It is deemed to be one of the killers of the TV licence, which perhaps is not a surprise when even the most premium Netflix package is only just the equivalent cost of a standard annual TV licence.

But is it all about cheaper viewing for consumers? Absolutely not.

Though overperforming on all key drivers, there is no question that Netflix's strength lies in its dynamism. Sitting only just behind the king of market disruption, Amazon; on par with the likes of Google and significantly ahead of the entertainment average. See Graph 2 overleaf. ▶

Graph 1
Google search trend



This sense of dynamism has by no means happened by accident, Netflix has worked hard for it. Their ATL spend grew by a whopping 213% in 2018 (£15.3 million); coming after competitors on their own platform, with 35% of that spend being on terrestrial TV. And having found their USP through the global success of their first Netflix original series 'House of Cards' in 2013, the focus of spend has been on creating buzz around this unique element. And create buzz it has, Netflix overtook Sky on Google searches back in 2014 and continues to drive a significant lead ahead of both Sky and Amazon Prime.

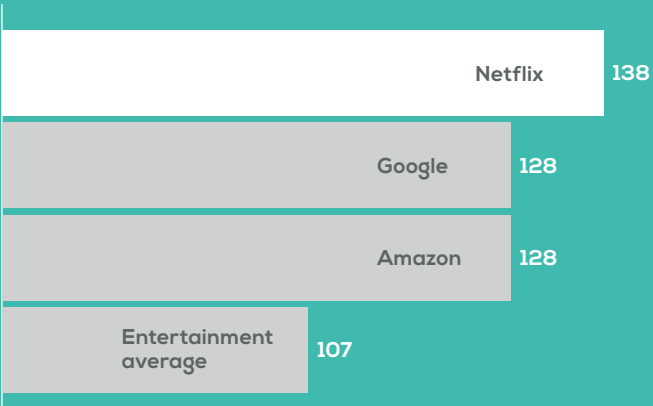
However, it's not just the noise around the brand which is helping to boost its connection; Netflix are proving to deliver on experience as well. Being an entertainment brand, you'd expect it sets out to make consumers smile; with an entertainment category average index of 121, Netflix exceeds even in this area, with an index score of 177.

This is probably to be expected when you see the deep positive emotional connection that it drives with consumers, carving out a very similar yet less negative profile to the BBC, a brand

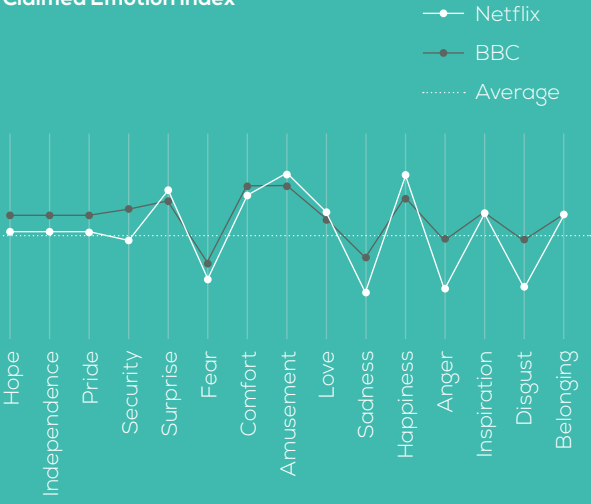
which UK consumers have known and loved before Netflix was a glimmer in their eye!

So, what does the future hold for a brand growing at such a rate? Well to be honest, probably a lot of the same! There are no signs of slowing down. Netflix's ATL spend in the first half of 2019 is already double that of 2018; they continue to break viewing records with launches such as Stranger Things and they have household names like Sandra Bullock, Jennifer Aniston and Ricky Gervais waiting on their roster.

Graph 2
Dynamism index



Graph 3
Claimed Emotion index



The next challenge for Netflix appears to be breaking down the barriers amongst the baby boomer generation – but based on their previous success, this may well be more a question of when, rather than if.

The power to programme

With two-fifths of UK adults claiming that streaming services are their favourite way to watch TV and a record 47% of UK homes now subscribing to a streaming service (Ofcom), it's of little surprise that Netflix comes in as the 11th Most Connected Brand. Not only has Netflix become one of the top generators of 'watercooler-conversational-moments' and cultural trends (such as Stranger Things and the Bird Box Challenge), it's also changed the cinematic rules for video storytelling.

In a subscription service world, ratings don't actually matter as the money's been paid up front. It's more important to create amazing content that wins awards, creates cultural buzz and cultivates fanbase's that will keep coming back for more.

Yes, you could binge watch boxsets before Netflix, but never brand-new shows. New shows required you to wait at least a week and to tune in at a time demined by a studio executive if you wanted to find out what happens

next. Netflix turned that thinking on its head and decided to cater to an Internet culture that thrives on being 'first' and having everything at their fingertips.

The power to programme is now in the hands of the consumer and it's safe to say consumers love it.

That's not to say that it's going to be smooth sailing for Netflix moving forward. The company has amassed US\$42 billion in debt, has an annual programme budget of US\$15 billion and is facing pressure to show advertising in order to help make more money – something it says it will never do. Its biggest threat however isn't financial. It's from other streaming service; in particular Amazon Prime Video and Disney's new service Disney+.

Amazing content is the key to Netflix's advertising strategy and unfortunately for them, it's one that competitors with deep pockets can copy. Disney appears to be going for broke in this regard as it's pulled everything Marvel and Star Wars off of Netflix and is launching spin off shows

on Disney+ that are directly connected to their cinematic universes (something Netflix could never achieve).

The key to Netflix's survival may be the familiarity it's achieved through its first-mover advantage and its connection to popular culture. Consumers don't actually want to purchase 15 different streaming services to watch their favourite shows – that was part of the issue cable TV had.

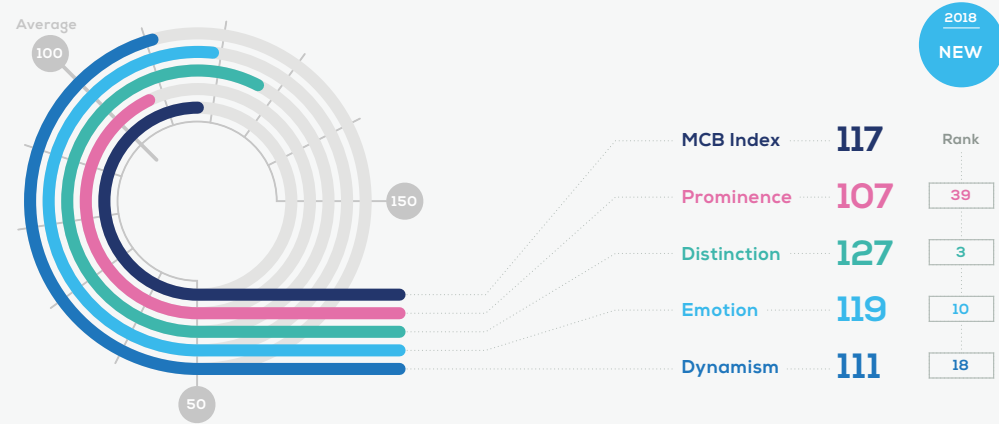
As long as Netflix keeps pushing the boundaries on storytelling forwards, such as its Choose Your Own Adventure formats and producing high quality content, there's a real chance that consumers will simply find other ways to watch non-Netflix shows. While it's true, and unsurprising, that other streaming services appear very high on the Most Connected Brands list, none of them have figured out how to influence cross-generational popular culture at the levels of Netflix and Chill.

Chris Walts

Strategy Lead, Social, Ogilvy



LEGO



Playing well: the enduring appeal of LEGO

LEGO sits just outside the top 10 Most Connected Brands in 12th position, displaying its unique ability for a toy company to emotionally connect with adults and children alike.

The brand's appeal is particularly apparent amongst those aged under 50, moving up to eighth position amongst those aged 18–34, striving ahead of the likes of Facebook, Instagram and WhatsApp.

MCB Index ranking by age:

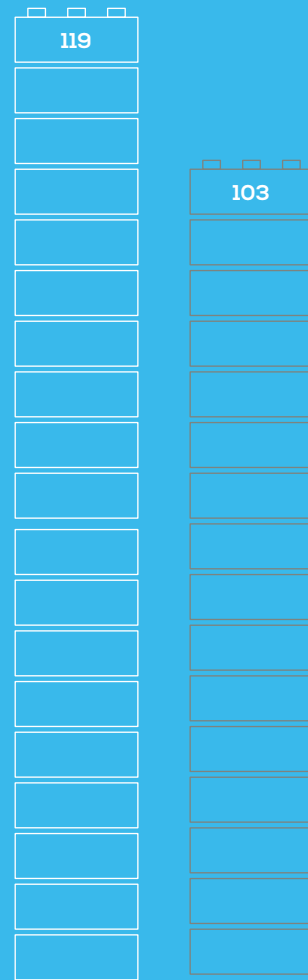
18–34s	8 th
35–49s	9 th
Over 50s	23 rd

The LEGO brick celebrated its 60th anniversary this year and its revival since its troubles in 2003 has been hailed as the greatest turnaround in corporate history. LEGO Group is now worth USD\$7.57 billion, making it the world's most valuable toy brand in 2018, and in the eyes of consumers an iconic brand.

The entire LEGO brand as it's known today was built on a simple foundation: one, small, plastic brick, 31.8mm long by 15.8mm wide, with eight studs in two rows of four.

There are now more than 3,700 different types of pieces, from mini figures to tubes and accessories such as wheels and swords and more than 900 million building combinations are possible with just six bricks of the same colour. ▶

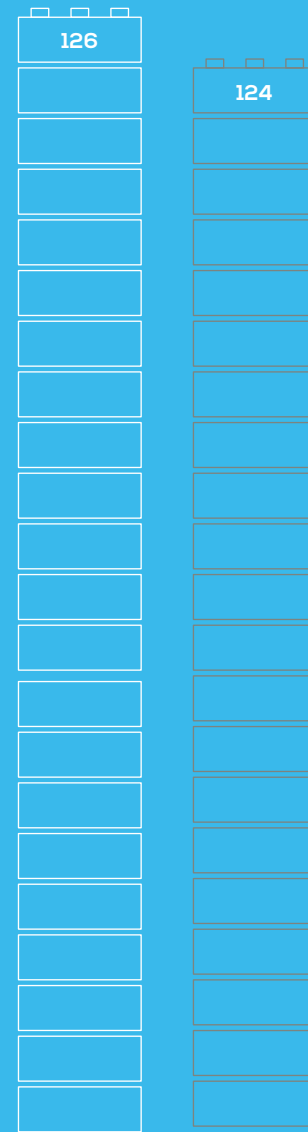
Emotion index



LEGO

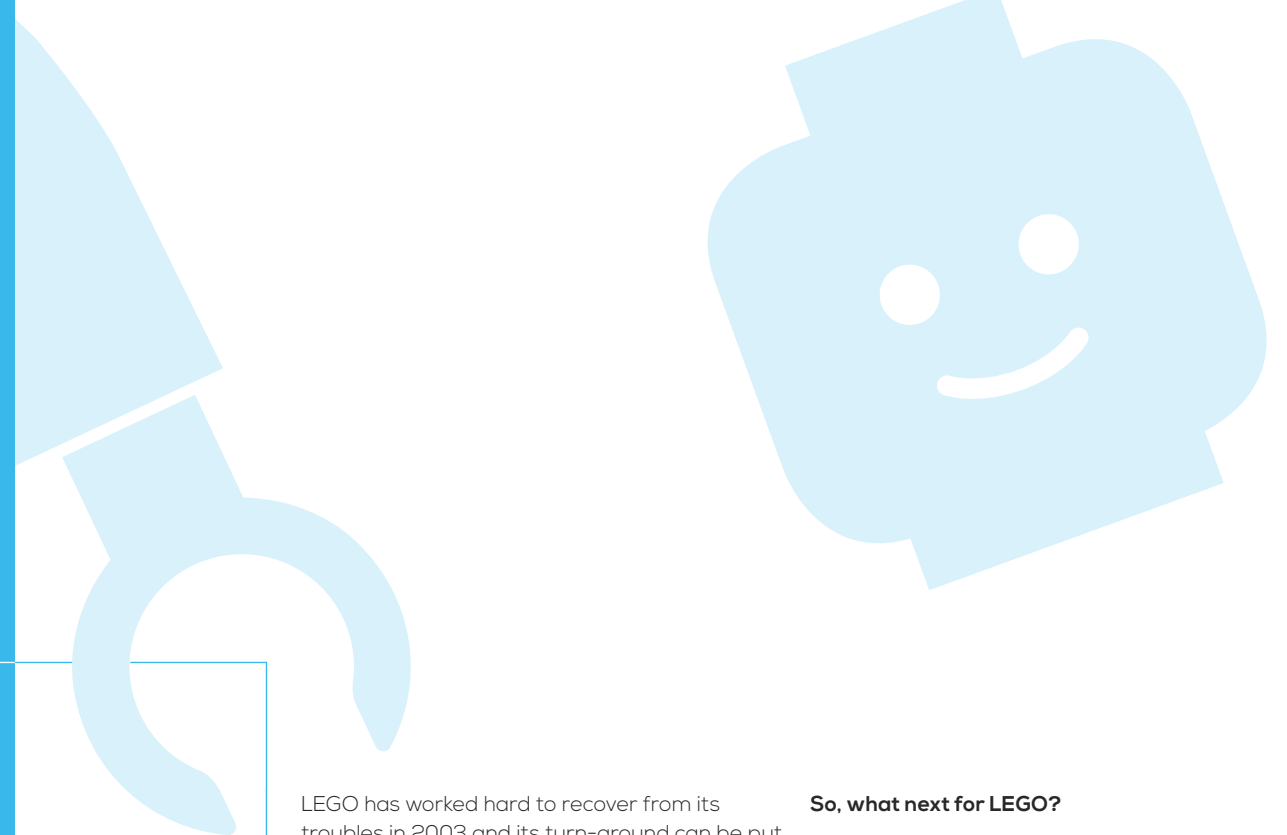
Apple

Setting trends index



LEGO

Apple



LEGO has worked hard to recover from its troubles in 2003 and its turn-around can be put down to diversification. Creating new entities, TV shows and two very successful movies, the brand's appeal shows no sign of abating.

This is certainly reflected in its core brand strengths, driving a positive emotional connection and delivering a great experience.

LEGO has often been called the Apple of toys and this design led company certainly competes with Apple in winning over consumers, overtaking the tech giant on both connection and setting trends.

So, what next for LEGO?

Last year the brand celebrated the 10th anniversary of LEGO Ideas, which was its first venture into user-driven innovation, allowing fans to submit ideas for LEGO products to be turned into potential sets. LEGO's push towards crowdsourcing their latest sets demonstrates the brand's ability to stay relevant, its desire to continue to engage their customers and create a buzz around the brand as it faces increasing competition from technology-based toys.

Building a bright future

Anyone wanting a 'best practice' case study in brand stewardship need look no further than LEGO. The company's ability to retain the brand attributes, so many of us enjoyed as children, and balance those with relevant innovation and reinvention is remarkable. As a result, LEGO is a brand that has consistently and reliably connected with children and their parents for over 60 years.

LEGO is known for its core product of bricks (they produce over 100 million a day!), but like all strong brands it's about so much more than the physical product. At a time when many brands are searching for a credible purpose, LEGO's 'Nurturing skills to help the next generation shape the world' is a relevant, engaging and motivating purpose statement that drives the strategy, culture, propositions and behaviours of an entire

organisation. And of course, it's always been a responsible and caring brand – the very first LEGO sets included a town plan to help children learn about road safety.

So how is LEGO positioning itself for the future? It's addressing issues of climate change and sustainability with its new plant-based plastic products (but more needs to be done on the environmental front). And it's tackling the competition for children's attention from the FAANGs (Facebook, Amazon, Apple, Netflix and Google) by keeping close to the consumer, crowdsourcing suggestions, harvesting ideas from a global insights group and then realising them with a team of over 250 designers from 40 countries.

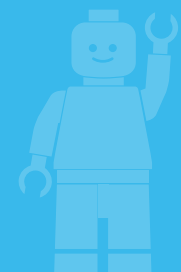
Indeed, LEGO has already made great moves to integrate the physical product with digital

technology. From the AR Playgrounds app to the LEGO Boost Creative Toolbox that encourages youngsters to learn coding basics, the brand is modernising and innovating in line with its purpose. And we should remember that even the techies at Google use LEGO bricks to help them innovate!

As Julia Goldin, LEGO's Global Chief Marketing Officer said "we look at every year starting at zero because you have to recruit every child again and make the brand exciting for them. That becomes a good challenge, of course."

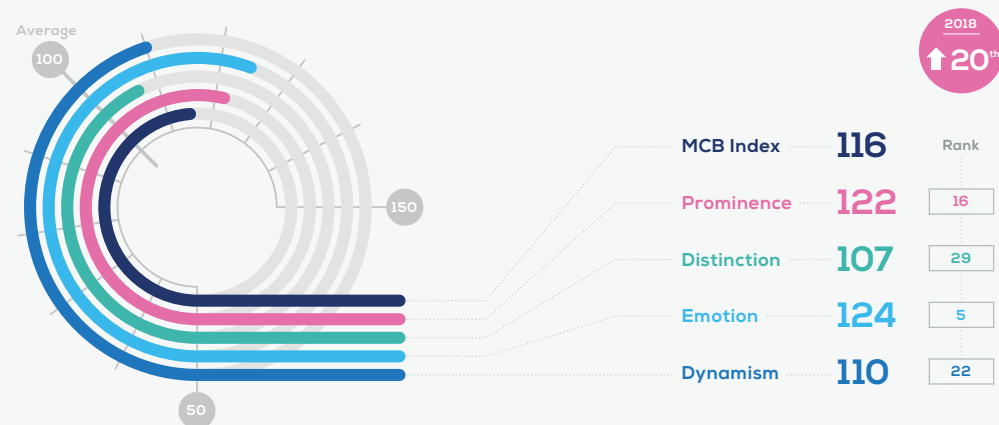
Perhaps in the future the fact LEGO bricks are physical (and not virtual/digital) will be a real strength – a way of weaning children away from 24-7 screen time and engaging with the real world directly.

Adrian Day
Consultant





COLGATE



Brushing up the ranking

For more than a century Colgate has been a market leader in oral hygiene products, and the brand's performance this year shows Colgate continues to put a wide and bright smile on the face of consumers.

Indisputably one of the brand's core strengths is its sheer prominence. The brand continues to hold more than 40% of global market share, and with an equally dominant place in the toothpaste market in the UK, it stands far taller than many of its competitors.

Colgate's place in the market is not because it's a flashy market leader. Although 51% would

describe Colgate as an iconic brand, this is not noticeably high by comparison to many of the brands near the top of our list this year.

In fact, what really cements Colgate's place in bathrooms up and down Britain is the connection it has with its customers. With a score of 124, Colgate ranks fifth this year on Emotional connection, as its almost abundant appearance in our bathrooms makes it one of the most relatable brands. Over two thirds (69%) say that Colgate represents someone like them. It might not be flashy, but it's the type of thing that ordinary people just have at home.

Its commonality and relatability clearly are supported by Colgate, marketing itself quite strongly as the brand that works. And in that sense the connection we have with Colgate is that it simply is the toothpaste that will clean their teeth the best. 63% associate the emotion of security with Colgate, and 26% even describe it as a brand that they cannot live without. Its long-term place in the bathroom, keeping our teeth clean, simply means that consumers trust the brand.

This brand might not have done anything noticeably differently in the last year, but

Colgate has moved up the ranking this year primarily because it has done even better on its already strong pillars of Connection and Prominence. And part of this is due to continued high spend through the medium most likely to engage with a huge swathe of customers: television. In the year to July 2019, Colgate spent almost £16 million on television advertising. This is a significant increase on the £8.5 million spent in the year to July 2017. With fears that Colgate could be losing market share, clearly this outlay is paying dividends in improved perception of the brand.

Colgate – still a bright smile?

Colgate is one of the most recognised brands in the world, standing for science-based effectiveness, as well as efficient brand management. We grew up believing dentists recommended it. The brand grew like Topsy and is now sold in over 200 countries.

Vast variety undermines brand credibility

But a large range and complicated brand architecture will at some point undermine the brand's authority and credibility. Today, there are 54 varieties of Colgate toothpaste not including all the Kid's ranges. Having a product called 'Total' surely means it should cover everything your mouth needs to be healthy? How can another be called Maximum Cavity Protection? How do we decide whether to prioritise gums over enamel or cavities? Why do we need to work through a long table of comparison just to choose our toothpaste? Complexity leads to loss of sales. It's Total confusion.

Leading brands need to fulfill expectations

In 2019 there are three key areas where we would expect to see Colgate taking the lead and really connecting with consumers; natural ingredients and sustainability, teeth whitening and electric ranges. Somewhat surprisingly, it is not leading in any of these segments.

In 2017 Colgate-Palmolive announced it would expand its business to respond to the demand of 'modern consumers' for natural products. Why wait until we demand it?

In the teeth whitening arena, Colgate's 2019 Max White Expert advertising campaign 'You've got it' drew much criticism for its seemingly bizarre choice of a blindingly white androgenous-looking, lead blonde model, shot in an all-white quasi-scientific ultra clean set. Apparently Colgate's 'new' whitening toothpaste is in fact, from the 1960s.

Colgate's electric range is also surprisingly basic. Compare it with OralB's electric toothbrush system Genius X, launching in 2019. It has AI built-in giving real time feedback from the brush via the Bluetooth-enabled app, alerting you when you brush too hard, in the wrong direction or for not long enough. You can even charge your phone with the USB port.

A more connected brand experience is in reach

Colgate could take inspiration from OralB and go much further. The Total brand is just crying out to be a Total System. Maybe even a family subscription model for brush heads, toothpaste and mouthwashes with connected toothbrushes, gamifying brushing for kids and adults and helping parents instill good habits in their children with the support of a trusted family brand.

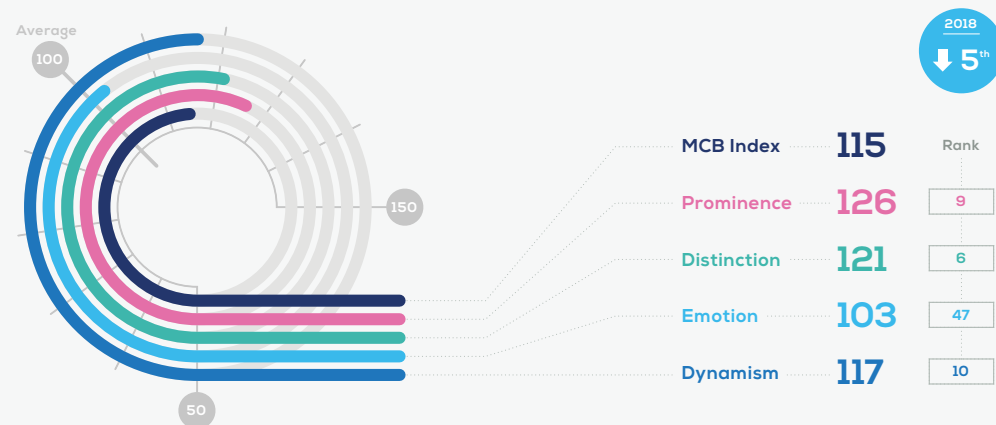
Smile, the future's bright.



Brigid McMullen
Managing Director, Workroom



APPLE



No longer an Apple a day

The multinational tech brand Apple might feel impossible to get away from these days. Phones, watches, tablets, laptops at work and at home. And that's without even touching upon Apple TV and iTunes. Building on its current payment method offering, the giant has even developed a credit card, Apple Card, this year. You could be forgiven for asking, 'what does Apple not do?'

Despite still being a top 20 brand in the UK, it might appear that the one thing that Apple hasn't done this year is win over all consumers in a fast-changing market. 2019 has seen

Apple's place fall nine places from fifth to 14th.

Although Apple no longer holds a coveted top 10 spot in the list of UK brands, this is not due to some terrible decline. It still maintains incredibly strong scores across our index, but it is facing some problems.

A notable issue for the brand is a decline in popularity, going from the fifth to 14th most popular brand in the UK, dropping from a score of 124 last year to 117 this year. To a slightly lesser extent, Apple also saw a decline in buzz, going from third place to eighth.



It's been 12 years since the first iPhone was unveiled by Steve Jobs, and keeping us all hooked on the latest release is hard to do. This year has certainly seen Apple watchers put a dampener on the latest iPhone developments, and some have even predicted a "lacklustre year for iPhone". With Apple relying on its reputation for innovation, sometimes it really is only as good as its next big hit.

Even if its reputation might be considered a curse if a new release isn't tipped to reach sky high expectations, other tech brands would be envious of how Apple is perceived by consumers. Just over half (52%) think that Apple is always looking to push the boundaries, more than any other brand in the UK, while three quarters (77%) think that it is an iconic brand. Perhaps it's unsurprising that inspiration

is by far the most common emotion associated with the brand.

But not only is it seen as a revolutionary brand, but its wide product range and ubiquity will continue to serve the brand well for some time to come. That we have welcomed these products into our lives is crucial for giving Apple's brand a strong base. A quarter (26%) think that Apple is a brand you can't live without, and 53% think that the products and services they offer are good.

With this immensely valuable underlying perception of the brand, expect Apple in the top 10 again at some point in future once another release captures our imagination as many have in the past.

Can Apple continue to lead the pack?

Apple has truly tapped into the emotional element of brand loyalty with its range of products.

They gave high technology design appeal, so that it is 'cool' to not just own an Apple product but be seen to have one, a status symbol.

The experience starts with the customer journey in the purchase of the product. The design aesthetics continue with the packaging before you get to the product itself. There is an element of both fashion and luxury to the Apple brand driving 'want'.

Indeed, Apple not only addressed the core product, it extended this to the complete offering.

However, despite having strong brand loyalty, early adopters are still concerned with keeping up with and acquiring the latest technology.

Indeed, look at the proliferation of smart phones in existence that to a large degree owe their existence to Apple's innovation and design. Witness the current focus particularly in the smart phone

sector where features continue to be promoted as 'must haves' as opposed to 'do I really need that?'

And with the recent launch of 5G, Apple decided initially not to follow the herd, its iPhone doesn't yet support 5G and probably won't until 2020. According to industry watchers they predict that iPhone sales over the next year are expected to drop between 15% and 19%.

The counter argument to this is whether 5G will have that much of an immediate impact. If you're happy with your 4G phone, would you really want to expend cost and swap to another brand? The research for Most Connected Brands showed the brand had fallen from 5th to 14th in popularity. Isn't this an indication of consumers expectations, that every September they have come to expect Apple to announce the latest amazing new products?

As technology-based products mature, endeavouring to find the latest new feature or function places stress on product development has to be balanced against whether the customer

will want or value these upgrades. Will they strengthen brand loyalty and produce an acceptable level of return on investment?

To reduce the reliance on hardware, Apple has diversified into the services sector, with Apple TV+ their latest streaming video service to appeal to users. Apple recently announced that Apple TV+ will be available on the Apple TV app for £4.99 / \$4.99 per month with buyers of iMac, iPad or iPhone receiving a years' free streaming. And with the Apple TV app available to download on smart TV's such as Samsung, Apple is extending its market coverage.

This is service innovation and part of Apple's strategy to reduce its exposure to hardware and provide a significant income stream.

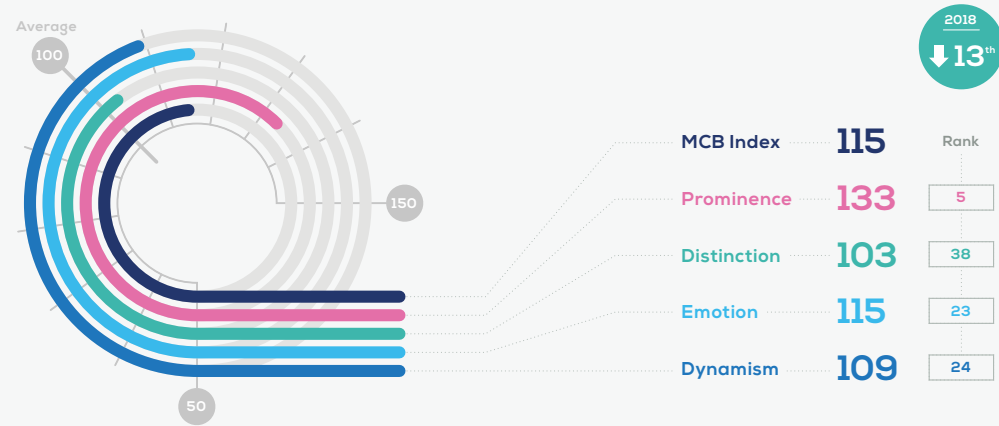
A canny move that whilst it will bring it into competition with Netflix and Amazon Prime, is set to underpin Apple's growth that will bring them back into the top 10 Most Connected Brands in the UK.

Les Wilcox

Managing Director, Outpost



TESCO

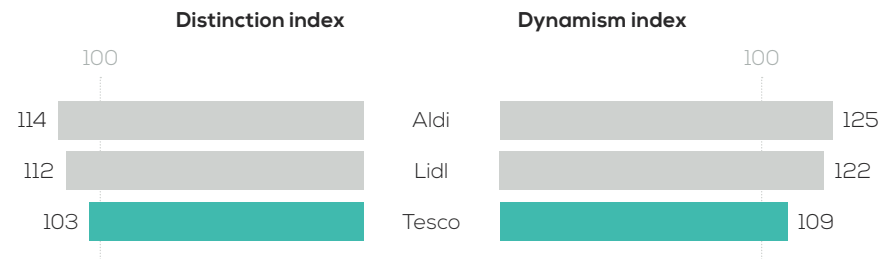


Every little adds up

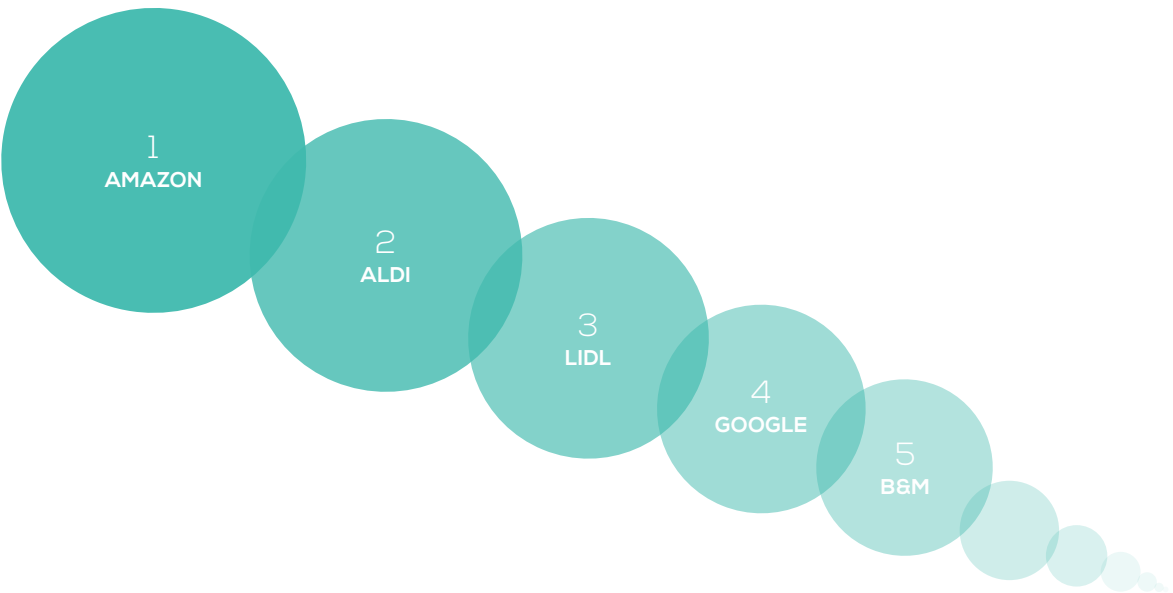
Tesco has been knocked off the top supermarket shelf by Aldi and Lidl snapping at its heels. Rise of the discounter? It's already happened.

So, has Tesco gone stale?

On first glance, it would appear so. Whilst still in the top five most prominent brands in the UK, Tesco lags behind 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 ▶



**Top 5 brands that offer
good value for money**



a harbinger of future success. The fact that Tesco is close to average on both these metrics indicates a brand which is stalling.

What’s more, both Aldi and Lidl excel at offering customers value for money, something which remains crucial to consumers who have been suffering from a stagnation in living standards and weak wage growth. It has long been attested that the Big Four of Tesco, Sainsbury’s, Asda and Morrisons would not fare well in price wars with the more nimble and shallow-stocked discounters, and consumer perceptions seem to support this.

Tesco, for example, has a strong association with ‘having great promotional offers’, yet

this doesn’t translate into an equally strong perception of offering ‘value for money’ or significantly higher levels of Emotional connection. This indicates that although discounting initiatives, such as their recent ‘100 years of great value’ campaign, are welcomed, they are failing to cut through and create a lasting impression of value. With profits a sensitive issue for Tesco, they should consider whether their current strategy is sustainable given the impact to their bottom line and lack of evidence it is driving consumer connection.

So where can Tesco go next?

Well, it’s far from game over. Within the supermarket category, Tesco have the highest

Most Connected Brands Score amongst 18-34 year-olds, an audience that the discounters haven’t been able to crack quite yet. Additionally, the brand scores well on understanding what is important to consumers, having values or ideals that you can relate to and on corporate responsibility. Combined, these factors indicate that despite stiff competition the brand is still in rude health.

As for enhancing the brand’s Distinction and Dynamism, Tesco have been looking to a different brand entirely: Jack’s. Jack’s is Tesco’s direct response to the challenge of Aldi and Lidl and focuses on offering cheaper produce. Currently only operating in sites in the North of the UK, Jack’s also has incorporated new

technology into its offering, such as using its app to scan barcodes as you shop, allowing customers to keep track of their spending and check out in a matter of seconds.

Whilst the idea that Jack’s could provide an innovation pipeline for Tesco stores and be a low cost challenger may have been good in theory, its success has been muted by a colder reality that Aldi and Lidl have created a stranglehold in the discounter supermarket space.

Tesco may have lost that battle, but as a brand it is showing signs that it is willing to innovate to remain connected and will certainly be vying for its crown back in next year’s index.

Small acts, big difference

Blue Planet has given Brexit a run for its money over the past year or so as the number one topic of concern and conversation in households up and down the country. And with movements like Extinction Rebellion appealing across the generations it's no surprise that, for the first time, care of the environment is now people's highest expectation overall towards business in the UK - surpassing expectations of better value.

This is one of the key findings of FleishmanHillard Fishburn's latest Authenticity Gap study which measures what a business says about itself against what an informed consumer experiences from that business. Our data on the UK supermarket sector indicates that, as a category, better value remains the number one reputational driver for people choosing where to shop but care of the environment trails it a close second.

As the largest supermarket in the UK Tesco is aware that it has both the opportunity and the responsibility to be a sustainable retailer at scale. Demonstrating big ambition, quick wins and validated through credible partnerships.

It's a little under a year ago (November 2018) that Tesco announced a four-year partnership with WWF with a bold but simple aim - to halve the environmental impact of the average UK shopping basket. This would be achieved by helping consumers eat a more sustainable diet; restoring nature in food production and eliminating waste in retail.

From a communications perspective, the partnership and resulting framework has provided Tesco with a steady stream of stories and initiatives that ordinary consumers and employees can relate to. The launch itself reiterated the demand from consumers for action and allowed Tesco to position itself almost as a delivery partner of the WWF helping to secure goals in common and echoing a sense of shared values.

Forging common cause with NGOs can also serve as useful armour in a climate where activists can deliver verdicts and mobilise social discontent towards businesses at speed. Such partnerships can also help businesses inform and manage the expectations of others in media and political circles who shape their

corporate reputation and ultimately determine their licence to operate.

In terms of taking credit where credit is due - Tesco's core brand value of 'Every little help makes a big difference' will hopefully mitigate against any sense of bravado at this stage. Plus, pressure to manage rising food costs on the (extended) eve of leaving the European Union will test initiatives that carry large operational price tags. However, there is evidence that Tesco feels it established its credentials sufficiently on environmental matters to call on others to follow suit - its recent supplier meetings setting targets on the recyclability of plastic packaging is a case in point.

There's no doubt that Tesco (and others) are applying themselves to this issue, but can it ever be enough? We often see a lag between what consumers expect of a business versus their appreciation of what is being delivered in practice. With climate concerns rising year on year Tesco needs to continue to 'do its bit' without coming to own the issue outright.

Liam McCloy

Food and Drink Lead, EMEA, FleishmanHillard Fishburn



Our expert views

Four key trends

The rise of resilience culture

The changing existence of consumers

Tom Savigar, Senior Partner, The Future Laboratory

We live in an age of self-censorship, hyper-safe spaces and comfort zone culture, nestling among the people, platforms, places and behaviours where we feel like one of the crowd.

But this bubble-wrapped existence isn't working. Personal dissatisfaction and anxiety remain prominent issues, and the American Psychiatric Association reports that 39% of US adults felt more anxious in 2018 than the previous year.

As Greg Lukianoff, co-author of *The Coddling of the American Mind*, says: "We are teaching a generation the habits of anxious, depressed and polarised people, and then we're surprised that they are anxious, depressed and polarised".

To help consumers break out of their mental and physical cocooning, counter-movements are materialising around the world. Coinciding with this sense of dislocation, simmering citizen discontent

has ignited our streets and social feeds, embodied most recently by France's gilet jaunes demonstrations, Venezuela's political and presidential unrest, and Extinction Rebellion's global climate change protests.

"At a time when a lot of people are experiencing greater pressures and austerity, there's a need for both resilience and a pathway for building it" Chris Johnstone, author of *Seven Ways to Build Resilience*, tells LS:N Global. "One reason is frustration tolerance – our ability to tolerate the difficult feelings that come up when there's a reality gap between how things are and how we'd like them to be".

Powering the rise of Resilience Culture, brands are driving this new movement, providing the challenges that will force us to recover, cope and transform, amplifying our largely untapped resilience in order to thrive. ▶

"Rather than attempting to eradicate negative feelings, brands have an opportunity to help consumers confront and mentally adapt to their internal anxieties"



Teaching tenacity

A recent study by the American Psychological Association highlighted how education is becoming a starting point for confidence and resourcefulness. It found children who had greater emotional regulation at age five were better equipped when it came to productivity, social skills and emotional problems at age 10.

A 2019 campaign from the British Army challenged young people for being selfie and gaming-addicted ‘snowflakes’ but with the aim of challenging them to enlist in order to build their resilience and debunk generational stereotypes. “We understand the drive they have to succeed and recognise their need for a bigger sense of purpose,” explains Major General Paul Nanson.

Positive discomfort

Experts are reframing stress as a positive force, rather than suggesting one must avoid it completely. “If you see stress as bad, catastrophic and something you need to avoid at all costs, each time you get stressed, it’s going to have a very negative effect on you,” explains positive psychology professor Tal Ben-Shahar. “If you see it as something that can make you more resilient, you will experience it very differently”.

This self-challenging mindset is now filtering into Western markets. Situation-based therapy, such as Authentic Revolution, attracts up to 5,000 people to its ‘game nights’, where individuals are placed in confrontational situations with strangers. Circling, whereby a pair share their honest perceptions of each other, encourages acceptance of personal criticism and boosts the ability to bounce back.

Extreme fitness

Challenging whether it’s healthy to keep chasing comfort, extreme fitness pursuits are re-igniting consumers’ visceral resilience. Tapping into this, the Extraordinary Adventure Club –whose expeditions are designed to unlock self-confidence and resilience – is working on a programme for cosseted Millennials, with demanding, mentor-driven experiences that will enhance their physical and mental development.

Perhaps the most notable rise in Extreme Fitness has been among women who are honing their resilience through exposing, sometimes unsafe, pursuits. Brands are recognising this opportunity. The North Face’s #SheMovesMountains global campaign reiterates the brand’s commitment to diversity in activities that rarely represent women.

Fortitude in failure

While the media lauds rags to riches stories, the reverse is rarely celebrated: the loss of success or desirability, starting over and becoming better for it.

Some brands are finding fortitude in failure. A notable example is fast food brand KFC, which hit headlines in 2018 when delivery problems caused UK outlets to run out of chicken. Some 600 UK stores were temporarily closed, with the brand reporting a five percent drop in operating profits.

With widespread customer backlash, the brand quickly responded with UK-wide newspaper adverts with the letters FCK printed on an empty KFC bucket. In the campaign, the brand wrote: “A chicken restaurant without any chicken. It’s not ideal... It’s been a hell of a week, but we’re making progress”, offering a humble and honest message, and publicly thanking its staff.

Enigma Brands

In future, with humans feeling more resilient and able to adapt to what life throws their way, brands will no longer need to pander to consumers, but will become evasive entities designed to be chased – with only the most resilient gaining their attention.

Having been used to getting what we want when we want, humans haven’t learned how to cope without. This will inspire a counter-movement in which brands will add complexity to the acquisition process.

Early iterations of this shift include Nike’s collaboration with designer Martine Rose. Making customers go the extra mile to purchase, the collection was only available via classified ads on Craigslist, with interested buyers required to contact one of three London-based sellers to arrange collection.

Taking this further, activewear brand Wone doesn’t advertise, has a minimal social feed and makes people apply to purchase products. Those who are successful then have to wait another week before being able to make a purchase.

In future, brands could take this concept a step further by testing their customers’ resilience, requiring that they embark on extreme experiences to be initiated into the brand family.

Are you building resilience?

In the face of a destabilised and volatile world, brands will need to help consumers move away from feelings of anxious helplessness and build in new parameters for resilience to allow consumers to make up their own minds and take ownership and responsibility for their actions.

Consumers are acknowledging the value of mental and physical wellbeing as a tool to tackle modern day aggressors. To confront and progress from their anxieties, rather than eradicate negative feelings altogether, consumers will want brands to embed vulnerability and stress into their pursuit of fulfilment.

Brands and businesses have created and shaped aspirations that consumers are beginning to realise and acknowledge are unattainable. It’s time for brands to close the frustration gap and adopt more responsibility for building a better, more diverse and realistic tomorrow.

Talkin’ ‘bout my generation

Subverting the stereotypes

Wez Eathorne, Research Director, Opinium

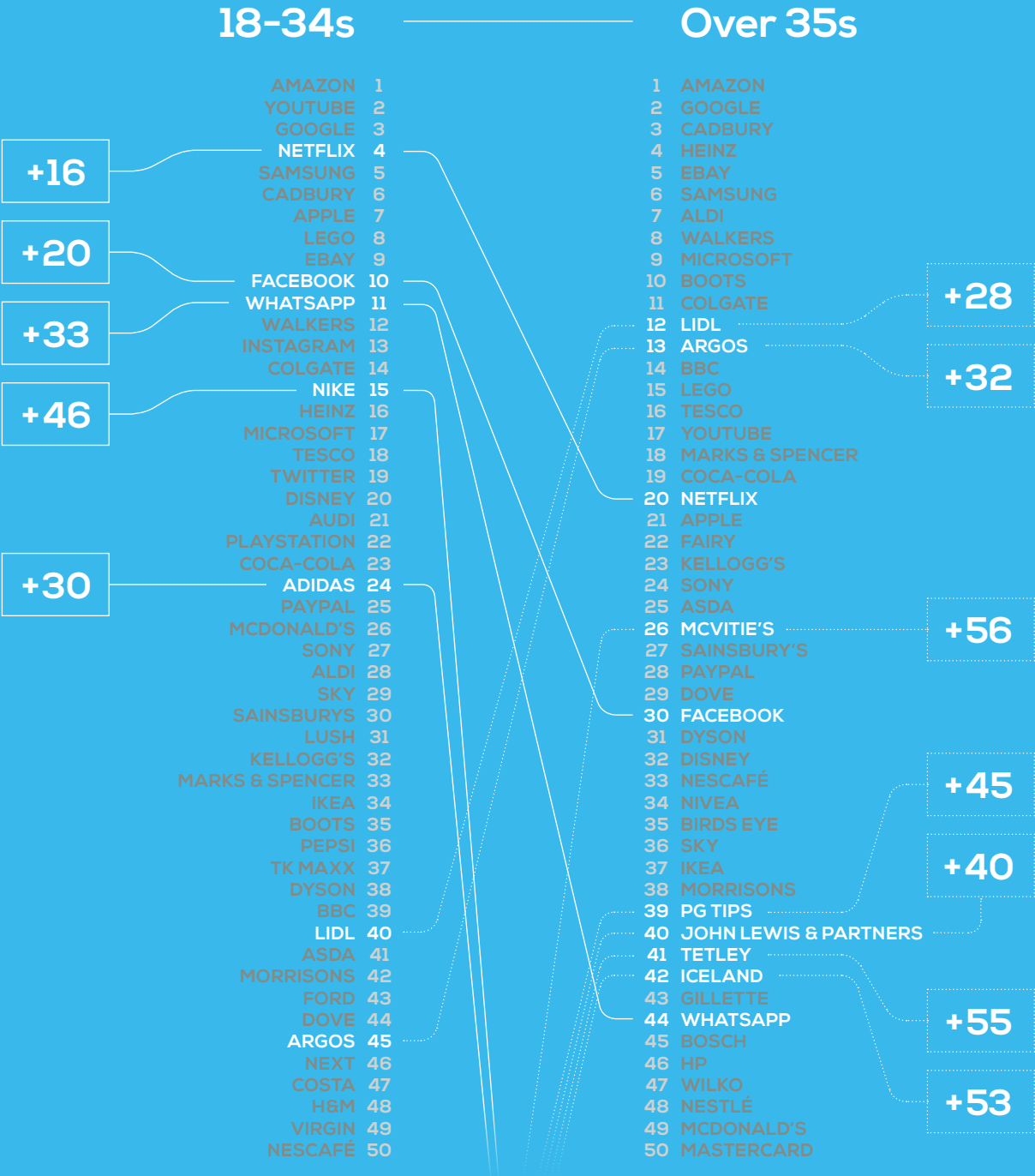
When comparing the Most Connected Brand ranking by age, there is a temptation to jump on lazy generational stereotypes. For example, that older consumers favour brands anchored in the past whereas younger consumers gravitate to the virtual world online.

However, this is far too simplistic; our study shows that the differences are driven by fundamental social, cultural and technological changes.

One of the most striking differences across the generations is that the very meaning of the term ‘Brand’ has evolved. For the older generation it represents the physical product you buy or the shop you buy it

from, whereas for the younger generation it is the app on your phone or the streaming provider that displays before your favourite show begins.

We have focussed on five key trends evident from the study, with many pointing to wider societal differences between each generation beyond just how they view their relationship with brands. Some of the differences link to how different generations view globalisation and the UK’s place in the world, whilst others explain why brands are so eager to go beyond a narrow focus on the products and services they offer to stepping into social debate and activism. ▶



Brand activism

Activism and the importance of global issues are on the rise amongst the younger generation. Be this Greta Thunberg leading a campaign warning of the global environmental crisis, or the survivors of the Parkland School shooting stepping into the gun control debate. Brands are increasingly aware of this and the responsibility that lies with them to strive for positive societal change. However, to truly benefit from brand activism the stand made must be authentic to the brand’s purpose, Gillette is a recent example where their campaign ‘The best a man can be’ intended to enter the #Metoo debate but in a way that felt insincere to many.

A global community

A clear trend in the study lies in the decreasing relevance of iconic British brands amongst the younger generation. Expansion of international trade and high levels of internet access has dramatically increased the British public’s exposure to other countries and cultures. This has led to British brands having to compete on an equal footing with global brands. Amongst the older age group, nostalgia has bonded them to these British institutions in a way that it hasn’t for the younger generation. How the generations view the world and the UK’s place in it isn’t just a feature of our study, but a mirror of the generational political schisms evident with issues like Brexit.

Changing tastes

A secondary effect of increasing globalisation lies in the pervasive influence of other cultures on UK tastes. An example of this would be the dramatic decline seen for brands like Tetley and PG tips in favour of brands like Starbucks amongst the young. The glamorisation of coffee via the likes of Friends and George Clooney is in danger of leading to the irrelevance of the ‘Great British Cuppa’.

Age is just a number

Our previous trend focused on the difficulty for historical brands in engaging with the younger generation. However, there are some brands that have successfully leveraged their history, whilst adapting for the new age. Disney is a great example, with the older generation growing up with Mickey Mouse in the same way the younger generation will grow up with Marvel. As a company Disney never stands still, spotting new possibilities and always adapting, this is evident throughout its history from Disney World, The Disney Channel, Pixar and more recently Galaxy’s Edge and Disney+.

The pervasive force of tech

However, by far the most disruptive influence between the generations lies in technology. It has shifted how we communicate, illustrated by WhatsApp’s appeal to the young, as well as how we shop, with bricks and mortar retailers like Debenhams losing ground to online retailers such as ASOS.

Brand purpose is dead. Long live brand activism.

The new world of corporate social responsibility

Emily Dickinson, Director, Opinium

Brand purpose. Heralded as fundamental to the success of brands and business alike, it has become agencies' go-to-explanation of what companies need to aim for, communicate and action.

But in 2019 is simply articulating your purpose, your reason to exist beyond making a profit enough?

Twelve months ago, it was apparent we had reached a watershed moment in public opinion on the excessive use of plastics. There was widespread scientific, if not political, consensus that climate change is the issue of our time. The tragedy of Grenfell Tower highlighted the social challenges facing so many in our cities whilst the growing awareness of the impact of air pollution on our health, increased pressures on social care and the rising obesity crisis all posed - and continue to pose - uncomfortable questions about how we as individuals and as a society, expect to be treated and to treat others.

Yet as consumers' belief in the ability of traditional institutions to resolve these issues has begun to wane, have brands and businesses embraced this as an opportunity to step-up and bridge the divide?

For anyone attending Cannes this year it would seem so. From Netflix to Unilever, P&G to The Body Shop, the topic of enacting brand purpose was the festival's hot topic.

But as every marketer knows, words only get you so far.

The emergence of the phrase 'purpose washing' is an uncomfortable reminder of the greenwashing phenomenon of the early 90s and a reminder too of the repercussions when consumers can and do see through false claims. ▶



Top 20 most socially responsible brands

- | | | | |
|------------------|-------------|------------------|-----------------|
| 1 st | CO-OP | 11 th | MARKS & SPENCER |
| 2 nd | LUSH | 12 th | LEGO |
| 3 rd | SAINSBURY'S | 13 th | MICROSOFT |
| 4 th | LIDL | 14 th | IKEA |
| 5 th | DOVE | 15 th | GOOGLE |
| 6 th | ALDI | 16 th | NIVEA |
| 7 th | MORRISONS | 17 th | NATIONWIDE |
| 8 th | ASDA | 18 th | PG TIPS |
| 9 th | TESCO | 19 th | CADBURY |
| 10 th | BOOTS | 20 th | HEINZ |

Key trend 3: Brand purpose is dead. Long live brand activism.

Yet when 92% of the UK population want businesses to speak up on key societal issues when is it safe for brands to not only talk-the-talk, but to act upon their principles?¹

The answer is probably never.

Taking a stance is never the safe option.

It's often inherently risky and divisive. The opportunity to alienate key audience groups is great.

But that doesn't mean that it's the wrong thing to do.

Nor does it mean that your brand needs to stand for something that it is not.

Very few of the top 20 most socially responsible UK brands could be compared to companies such as Patagonia or Allbirds. Whilst the Co-operative and Nationwide are owned by their members, none are not-for-profit organisations. None are charities.

But all actively and repeatedly embrace brand activism.

If that sounds like an oxymoron, it's not.

It's easy to categorise brand activism as addressing broader, 'big picture' societal issues, but employees, shareholders and customers are equally valid beneficiaries.

Activism does not (always) need to be altruistic.

The prevalence of supermarkets in the top 20 is testament to this. Food wastage, the removal of plastic carrier bags, the furore around both excessive and black plastic packaging, all have been issues that have forced these brands to take a stance. To create, improve and ultimately compete on the activation of their principles.

The result? Better for the planet, people and profits.

To many of us, this may not fit comfortably with the notion of brand activism defined by Levi's stance against the NRA or Nike's equally praised and derided Colin Kaepernick campaign. But it is equally valid and has, arguably, potential to drive longer-term and wider-reaching change.

Each of the top 20 supermarket brands has had as great, if not greater impact on the lives of their supply chains, their customers and the communities in which they operate. Each has ensured activism is central facet of their business by altering their day-to-day operations to reflect their principles. And each has understood that controversy alone does not equate with or drive lasting change.

If the top 20 most socially responsible brands remind us of one thing only, it is that in 2019 actions often speak louder, and resonate longer, than words alone.

Brand Brexit

Views of brands are divided by demographics more than politics

Adam Drummond, Associate Director, Opinium

Bringing politics into a report about brands seems impolite at a time when it seems like the British public is more divided on the issues of the day than at any point in recent history. A report² by the UK in a Changing Europe think tank found that peoples' political identities are increasingly based on the choice they made in the 2016 referendum rather than which party they usually vote for.

Because the Remain / Leave divide is a hardening, binary choice, rather than a choice between three or more different parties where perceptions often change over time, it bleeds into peoples' non-political lives much more than party politics normally does. The stark age split of the two camps with, broadly speaking, under 45s voting Remain and over 45s voting Leave means that the natural cultural differences between ages and classes have taken on a new significance as political markers.

In theory though, if we really are dividing into two electorates, shouldn't we see two different patterns of brand consumption?

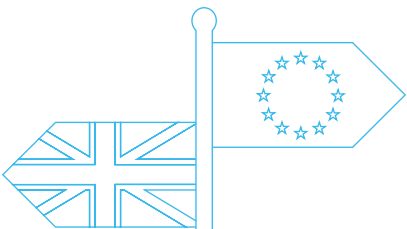
The consensus from our data is that we haven't.

Looking at the top five Most Connected Brands among Leave and Remain voters, the two camps share three out of the top five brands overall: Amazon, Google and Cadbury. The same is true of 2017 Labour and Conservative voters with both groups having these three brands in their top five.

Is there a "public position on Brexit effect"? Big businesses were notably reluctant to take public positions in the 2016 referendum, nervous about a repeat of what happened in the 2014 Scottish referendum which led to a backlash against businesses that had taken overt anti-independence positions. Those that did have tended not to be the kind of ▶



Key trend 4: Brand Brexit



consumer-facing brands that make our Most Connected list. However, there is little evidence among those where there is a high-profile pro or anti-Brexit connection.

Few brands are as closely associated with their founder as Dyson but founder James Dyson’s frequent public support for Brexit has not led to any backlash among Remain voters. Dyson is the 34th Most Connected Brand among both Remain and Leave voters. Conservative voters are likely to place it higher (15th vs. 36th for Labour voters) but Dyson’s prominence as a great British business success story is more likely to have tipped the balance here than views on Brexit.

Similarly, football and crisps icon Gary Lineker is a vocal supporter of a second referendum, and target of a tabloid campaign to have him sacked by the BBC because of this, but this doesn’t appear to have affected views of Walkers. The brand is actually more popular

among Leavers than Remainers (ranked fifth overall vs. 10th among Remainers) and party differences are negligible. While Lineker has been the face of Walkers for 25 years, the lack of any Brexit impact is a pleasing reminder that most people aren’t on Twitter.

The phrase “German car makers” now has political implications but, on balance, there is little difference between the way Remainers and Leavers perceive the three German car brands on our list as a category. Both groups give Mercedes-Benz virtually the same ranking (73rd among Leavers, 72nd among Remainers) and there is little difference in how they see Volkswagen (57th among Leavers, 63rd among Remainers). However, Leavers are more partial to BMW than Remainers (ranking it 55th vs. 71st for Remainers).

A significant political difference is in views of Boots. Overall it is ranked 16th but among Conservative voters it is as high as fifth while

Remain voters place it as low as 24th. In reality though, this is more a function of age. Boots’ ranking rises from 35th among 18-34 year-olds to 20th among 35-49s to ninth among those aged 50+. Very generally, the older you are, the more likely you are to interact with Boots and older people are more likely to vote Conservative and have voted Leave.

Where one might expect more of a political difference is in consumption of media and there are two points here. The first is that views of the BBC differ sharply while the second is

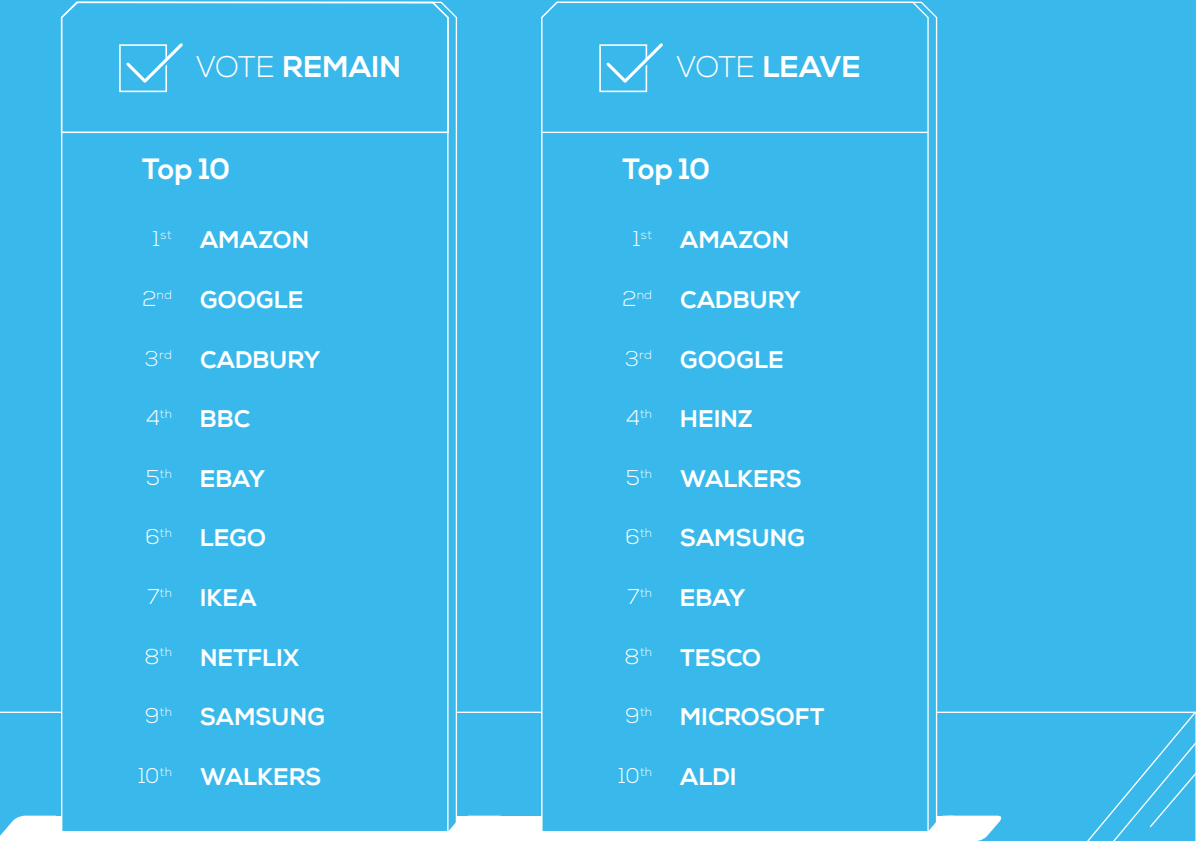
the fact that few of the more partisan news sources (e.g. news brands like The Daily Mail, The Guardian) don’t come close to making the list.

Remain voters and Labour voters both place the BBC in their top 10 Most Connected Brands (fourth and sixth respectively) while Leave voters and Conservative voters place it at 40th and 38th respectively. Views of the BBC have always varied politically but the lack of other news sources on this list suggests that it is the BBC’s wider cultural footprint, rather than and perceived stance on Brexit, that is driving the connections here.

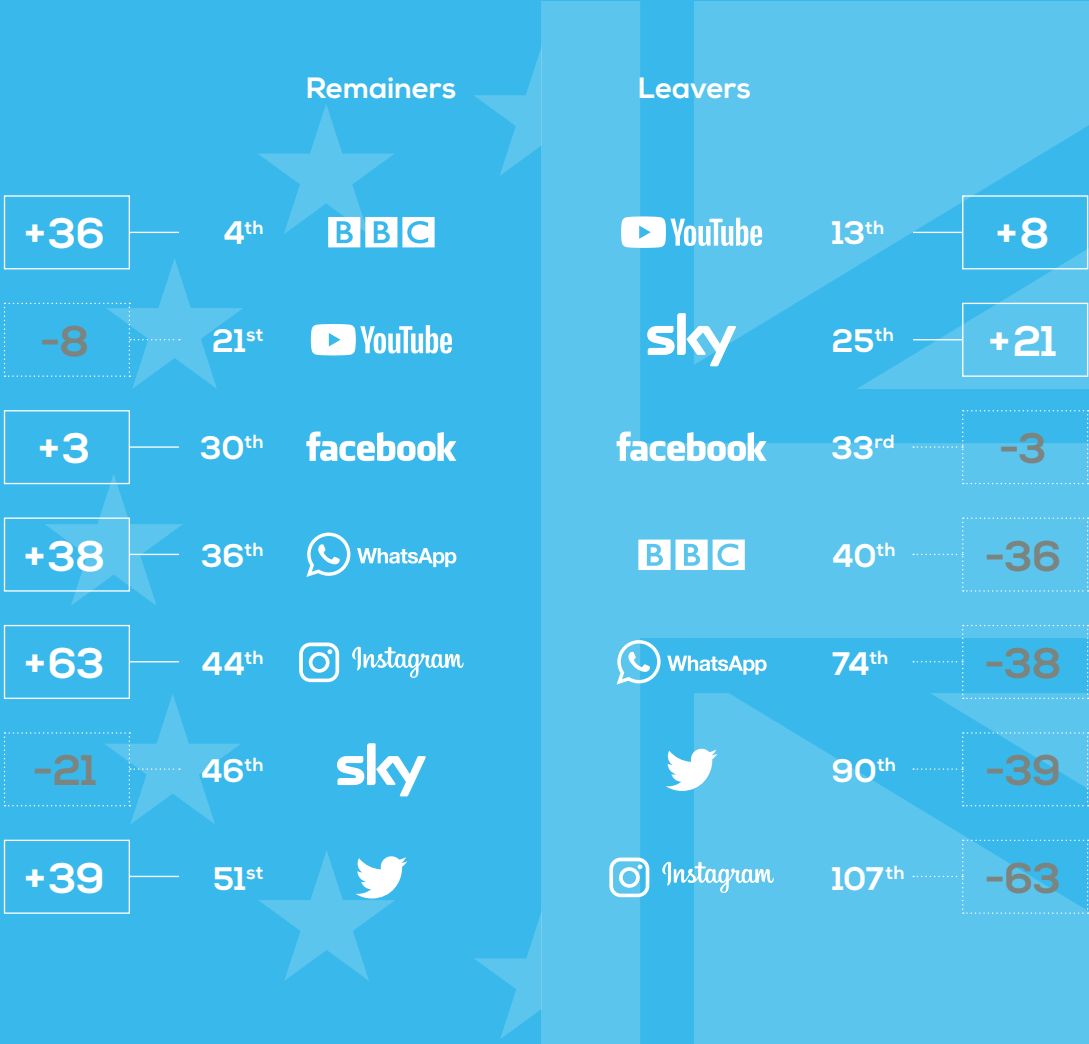
Judging by these results, therefore, the real change in recent years is the degree to which politics has mapped onto existing differences in life stage, age group and social grade. Those differences have always existed but, from a brand perspective, at least current political divisions aren’t exacerbating them.

Connecting with voters

MCB Index ranking by referendum vote



How voters connect with media brands





Sector overviews

Signs of resurgence for the banking industry

Alexa Nightingale, Associate Director, Opinium

Financial services brands remain few and far between within the UK top 100 Most Connected Brands. However, despite their limited appearance, our Most Connected Brands Index shows some encouraging signs for the sector this year.

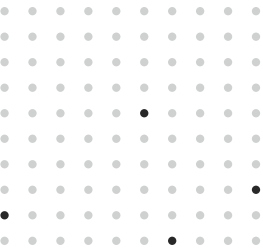
Whilst the two payment brands PayPal and Mastercard top the financial services category, retaining their favourable position, it is the retail banking sector which has made the most gains.

The UK top 100 Most Connected Brands now feature four of the major retail banks. Given the competition from other category brands, as well as the sector's reputational challenges over recent years, this is quite a significant achievement.

MCB Index ranking

- Nationwide 56th
- Halifax 80th
- Santander 81st
- Lloyds Bank 97th

Where banks sit in the top 100



Looking at the retail banking category as a whole highlights some relative strengths, with all four banks scoring highly on customer satisfaction and loyalty, as they continue to innovate and deliver a better more frictionless experience. ▶

The growing influence of FinTech's and nonbanks is obvious. PSD2 and open banking are having the intended effects—spurring innovation and creating a more level playing field. At the same time investments in mobile technologies are continuing to rise as the retail banking industry is fast embracing a mobile-centric customer experience.

The most notable gain this year is from Nationwide who is leading the way in winning over its customers, with high scores on all three metrics; satisfaction, willingness to use again and meeting needs.

But the challenge for banks has been always been less about winning over its own customers. People 'love' their own bank but love to 'hate' the banking industry.

That's why it's even more significant that Nationwide is changing perceptions beyond their own customers. It does so by connecting with consumers on an emotional level, standing out from the category and projecting itself as a socially responsible brand. For a sector that has traditionally suffered from reputational issues, it is a remarkable success for the brand to be recognised for its social responsibility, even outperforming some of the top 10 heritage brands such as Cadbury and Heinz in this area.

Nationwide has worked hard for these positive perceptions. As a building society owned by its members, it has recognised a clear opportunity for the brand to separate itself from the mistrust associated with the world of banking. This opportunity was realised with the Voices campaign, which first launched in 2016. Driving a message of inclusion and inspiration, it has earned the brand huge success, helping to grow the building society's share of switched accounts to 20%.

Creating a campaign brought to life by spoken word poets across a range of diverse backgrounds and ethnicities, Nationwide has successfully demonstrated to consumers what it set out to achieve – that it is a brand that represents the wider market and the rich diversity of British society.

Other major banks in the category can learn a lot from Nationwide as they continue to strive to connect with consumers across all generations. New challengers such as Monzo and Starling Bank are starting to break new barriers and as the retail banking sector embraces new innovations, delivers more frictionless, more connected customer experiences, there are signs of a sector that could be on the up.

Why the financial services industry needs to tell its story

Tony Langham, Chief Executive and Co-Founder, Lansons

Financial services scores lowest of the ten sectors measured in this year's Most Connected Brands Index. And that's no surprise. We've all got used to the perceived wisdom that financial services is seen as boring. Banks are the personification of boring. Insurance is the classic "grudge purchase". The investment industry speaks a different language.

But it shouldn't be like that.

The financial services industry enables many of the joys of life. The joy of buying that first house. The ability to enjoy a better retirement. Survival when things go horribly wrong. The sweetness of seeing money turn into more money.

The industry should be better at telling its own story and better at being relevant and connected to its customers. Although you can no longer see it, money still does make the world go round.

The part of the industry that most helps people live their best life, namely payments, has the easiest job. But that doesn't tell the whole story. The top-rated brand, PayPal, has made sure that it never seems like a bank and that shows in its ranking. And if you go to festivals and gigs, you'll see Mastercard alongside you, striving to give you a customer benefit. It can be done.

Underlying the industry's problem is its inability to define its purpose and value to society. Problems with public perceptions of executive pay, gender pay gaps and attitudes to diversity have silenced many of the industry's leaders and left the industry timid. This will not wash in the modern world. Businesses that look and sound like the establishment are out of favour. People will soon want to know what a business is doing to combat climate change and balance inequality. It won't be long before Greta Thunberg and her fellow travellers turn their gaze to financial services.

The presence of Nationwide at number 56 in the top 100 validates this argument. One of the UK's last remaining mutuals, Nationwide has deployed the whole range of marketing and communications techniques to articulate its social purpose. And it has worked.

The elephant in this particular financial services room is the price comparison industry. As anyone who's watched television recently will know, between the betting and car advertising they will be urged not to be confused, or to strut or to go to the cinema for half price. The absence of price comparison businesses from the top 100 is a sign of brand failure, rooted in highly repetitive, hollow marketing, that has worked commercially but has not connected with the people.

Ten years on from the financial crash, all of Britain's major banks, with the exception of RBS/NatWest, nestle at the lower end of the

rankings, between 81st and 106th. This reflects their creditable response to political and societal pressure. However, it could be judged as a poor return for the huge changes and investments in brand that they've each made.

In future years it will be fascinating to see how these banks fare against the challengers Metro and Starling, not to mention Monzo and Revolut. My suspicion is that to survive and prosper, the major financial services brands need to shed their timidity, explain how they benefit society and engage with the key issues affecting their customers.

How tech ate the world

Josh Glendinning, Associate Director, Opinium

What is a tech brand? The question may sound simple, but the answer is increasingly complex.

One in five names in our index are what we would define as a technology brand, but this hides a huge diversity. The brands range from those known primarily for manufacturing communication and entertainment products (Samsung, Sony, LG) to makers of household appliances (Dyson, Bosch) to PC and laptop brands (HP, Dell). They span social media giants (Twitter, Facebook, Instagram), financial service providers (PayPal), and mobile networks (Vodafone, EE).

Indeed, while consumers may mostly know these companies in one domain, the size, scale and diversity of their operations is sometimes difficult to comprehend. The idea that Google (second in the MCB Index) is simply ‘a search engine’ is faintly ridiculous when it has operations

in maps, mobile operating systems, machine learning, cloud computing, traffic monitoring, advertising, phone manufacture, payments, entertainment, self-driving cars, and much else besides.

There are plenty more on the fringes too. Entertainment and media firms like YouTube (eighth) and Netflix (11th) and transport firms like Uber (94th) are often considered tech brands, as of course, are the retailers at the top of our rankings – Amazon (first) and eBay (fifth).

Meanwhile, the past decade has seen many older firms sufficiently inspired – or perhaps frightened – by Silicon Valley to ape both their language of progress and their massive investment in R&D.

It has taken a while, but consumers are starting to evaluate even the youngest tech firms like they would any others. Technology giants are much more firmly embedded



Top 20 brands for Dynamism

1 st	AMAZON
2 nd	NETFLIX
3 rd	GOOGLE
4 th	ALDI
5 th	YOUTUBE
6 th	LIDL
7 th	SAMSUNG
8 th	CADBURY
9 th	EBAY
10 th	APPLE
11 th	WALKERS
12 th	WHATSAPP
13 th	INSTAGRAM
14 th	PAYPAL
15 th	FACEBOOK
16 th	MICROSOFT
17 th	SKY
18 th	LEGO
19 th	HEINZ
20 th	COCA-COLA



as part of the general brand landscape of consumers’ minds. It turns out the internet is just like real life, but online.

Of course, this change has pros and cons for tech brands. Perhaps unsurprisingly, nine of the top 20 brands according to our Dynamism metric are technology firms, but their increasing ubiquity means consumers now also feel a sense of loyalty and connection even to the youngest of start-ups.

On the other hand, bringing tech brands off a pedestal inevitably opens them up to the kinds of scrutiny and criticism that other companies have always faced.

Facebook is of course the case-in-point. The company may be content that its ranking has held firm since last year (25th) despite no let-up in negative headlines. However, the brand is still dogged by poor scores for customer satisfaction (95) and social responsibility (91). The other two brands in our UK top 100 owned by Facebook (WhatsApp and Instagram) are similarly afflicted.

Top 20 brands for social responsibility

1 st	CO-OP
2 nd	LUSH
3 rd	SAINSBURYS
4 th	LIDL
5 th	DOVE
6 th	ALDI
7 th	MORRISONS
8 th	ASDA
9 th	TESCO
10 th	BOOTS
11 th	MARKS & SPENCER
12 th	LEGO
13 th	MICROSOFT
14 th	IKEA
15 th	GOOGLE
16 th	NIVEA
17 th	NATIONWIDE
18 th	PG TIPS
19 th	CADBURY
20 th	HEINZ

Bottom 20 brands for social responsibility

81 st	INSTAGRAM
82 nd	BT
83 rd	NISSAN
84 th	NINTENDO
85 th	ADIDAS
86 th	MARMITE
87 th	VAUXHALL
88 th	PEPSI
89 th	TWITTER
90 th	FACEBOOK
91 st	LLOYDS BANK
92 nd	BMW
93 rd	VODAFONE
94 th	STARBUCKS
95 th	PRIMARK
96 th	EASYJET
97 th	MERCEDES-BENZ
98 th	KFC
99 th	UBER
100 th	CHANEL

And the sheer scale and global influence of these companies means it is so much more difficult for them to effectively control their brand reputation. WhatsApp is criticised for facilitating terrorist networks in the Middle East; Apple is blamed in China for the treatment of workers in its factories; YouTube is castigated for spreading conspiracy theories in Brazil. While it is not in our index, the string of recent headlines around Huawei show how these brands can get dragged into complex issues far beyond their control. These scandals and their impact don’t respect national borders.

This is clearly a problem for the tech industry, and younger firms in particular. Of the top 20 brands for social responsibility, just two – Microsoft and Google – are in tech. Meanwhile, tech brands make up five of the 20 brands with the lowest scores on this metric.

There is also a mutually reinforcing relationship between external reputation and internal angst. Recent leaks from

within major tech firms have exposed disquiet among employees at their actions, while undermining their long-cultivated reputation for harmonious unity of purpose.

While the tech firms towards the top of our index may seem infallible at the moment, it is useful to look at brands that held this same position 30 or 40 years ago. Sony, Panasonic, HP, Dell, and most especially, Microsoft have all been seen as infallible at one point or another. Indeed, it is interesting to note that some of the longest-established tech brands in the index (LG, Bosch, HP, Panasonic) achieve their highest scores in Connection, rather than Dynamism.

All these more established brands are still firmly ensconced in our UK top 100 Most Connected Brands. For those that are currently sitting on top, managing the transition from hockey-stick growth and apparent omnipotence to established and respected player is perhaps the next big challenge.

With great ubiquity comes increased responsibility

Matt Muir, Senior Consultant, Grayling

It's little wonder when looking at a list of the UK's Most Connected Brands in 2019 that so many of them are from the technology sector; after all, it's technology which increasingly connects us as people. From interpersonal connections facilitated by the Facebook suite of brands – whose role in people's lives seemingly transcends reputational harm – to the connections with the wider world enabled by Google's products, more than ever it's clear that businesses we would traditionally have thought of as being based on silicon, circuit boards and transistors are now based on their ability to link businesses, individuals and ideas across the world.

There's an extent to which one could argue that modern technology brands almost transcend the technology that supports them; far more important from the consumer's point of view is the personal and emotive impact these companies have on their lives. It's this

which drives the high degrees of consumer engagement with the technology brands on this year's list, and which, to an extent, protects them against some of the negative news stories which can often surround them.

From a point where just, scant decades ago, tech brands intersected with the average consumer only a few times per day, we have now reached a point where technology impacts our lives on a second-by-second basis. We check our phones every 12 minutes, we're glued to computers and the web at work, we augment our intelligence with Google, Wikipedia, Shazam and any number of online directories, we ask Alexa for everything from playlists to help with personal training, and we buy from Amazon more than monthly on average. Factor in smart watches, smart TVs, smart fridges(I), connected homes, smart doorbells, the inevitable smart glasses or contacts of the future, and it's impossible not to conceive of a world in which

technology isn't the primary lens through which we experience life.

So, what does this mean for brands?

Firstly, with great ubiquity comes increased responsibility. The 'techlash' from consumers has in the main been overstated by media – after all, Facebook's numbers seem consistent, and Amazon's dominance of the e-commerce sector doesn't seem to have been dented by reports of poor working conditions and the promise of a dystopian surveillance network in the offing – but that doesn't mean it's not coming. The importance of demonstrating social responsibility as a business has never been more important, particularly for Gen Z, with 55% of young people preferring brands that are eco-friendly and socially responsible. As technology becomes even more fundamental to the fabric of our lives in the next decade and beyond, we can expect consumers to pay more scrutiny

to the nature of the brands and businesses delivering the future.

Perhaps more significantly, a brand's connection with its customers is set to become the defining factor in its ability to gain market advantage. One of the parallel side-effects of the post-web tech boom has been the increase in, and demand for, personalised services to consumers. Customisation and personalisation at scale is one of the great benefits of modern digital technology – but to undertake this effectively, brands must not only have the technical capabilities but also the deep understanding of, and connection with, their customer base. Who are your consumers, what do they want, and how can you deliver this, seamlessly, in a manner which enhances their life and experience? Tech brands are perfectly-placed to win this battle and entrench their relationship with customers.

Fast fashion, slowing the retail market down

Hannah Teale, Associate Director, Opinium

What if the average UK shopper had the choice?

One in three would prefer to shop in-store. One in three would prefer to shop online. And, you've guessed it. One in three aren't bothered which channel they use!

UK consumers have never had more options when it comes to where they choose to buy their groceries, clothing, furniture or just that random new thing they needed. And it's not even as simple as a three-way split; within each channel there is an abundance of purchase options available – be it a pop up-store, concession stand, Instagram post, sponsored video. The list is never ending.

With the continued popularity of these new channels comes opportunity for an

endless list of challenger retailers to appear and chip away at brand loyalty. So surely, now more than ever, retailers need to be focussing on building a connection with shoppers, showcasing why they should be selected as the retailer of choice over and above all others.

Unfortunately, that doesn't seem to be happening. In 2019 the total UK Retail ATL spend has dropped 6 percent year-on-year whilst market brand performance proves to be distinctly average:

Emotion:	102
Prominence:	98
Distinction:	99
Dynamism:	100



It is a challenging time for retailers, so cutting budgets and relying on promotions isn't an unreasonable choice to make. No-one wants to join the long list of retailers that have disappeared from the high street over the last decade. But is that how those gaining success are winning? Simply put. No.

Winning through convenience

Online, multi-category pure players – Amazon and eBay, hold first and fifth place ranking of all brands this year respectively and pull ahead significantly on every key driver. Their focus on delivering a quick and convenient service has made them brands that shoppers claim not

to be able to live without (also ranked first and fifth respectively). And they've not done this quietly. Both brands have invested significantly in building this place in the lives of the British shopper; Amazon and eBay have grown their ATL spend by 22% and 56% respectively over the last couple of years.

Another retailer putting their focus towards driving a convenient experience is Next. Although just missing a place in the top fifty (ranked 51st), the brand jumped 20 places vs. last year (the highest growth seen for any retailer). No easy feat with no ATL spend seen in that time. The brand instead focussed on investing in the launch of several developments that aim to achieve a seamless customer

journey, including the likes of Same Day Click and Collect, Amazon Pick Up Points, Three Step Payment Methods, In-Store Credit Offering. You need an easier way to shop? Next is probably working on it.

Unfortunately, where there are brands on the up, more often than not there are those on the down. And one retail market feeling it the hardest is Fashion, with an average market ranking of 92 (down eight places year-on-year).

	2018	2019	
PRIMARK	46 th	53 rd	↓ -7
CLARKS	63 rd	59 th	↑ +4
TK MAXX	81 st	86 th	↓ -5
H&M	87 th	92 nd	↓ -5
ASOS	94 th	103 rd	↓ -9
NEW LOOK	96 th	107 th	↓ -11
RIVER ISLAND	98 th	108 th	↓ -10
TOPSHOP	—	110 th	■ NA
ZARA	89 th	112 th	↓ -23

As a group they underperform on most key attributes but suffer particularly on being seen an 'iconic brand' and 'always looking to push the boundaries'. There are very few feelings of surprise, amusement, pride or hope towards these brands. A rather bleak view for what should be an area that most closely expresses shopper's individuality and style.

Regular emails to my inbox and trips to local high streets suggest that these brands continue to rely on frequent sales and promotions as a

saviour for dwindling footfall; ironically fashion retail has one of the lowest associations with 'having great promotional offers'.

This raises the question of whether a good bargain really is what shoppers are looking for from retailers. In this time-poor world of choice, are shoppers prioritising those retailers who are taking the time to truly understand them, their needs and simply make their life easier. Potentially.




The enduring pull of the household name

Steve Looney, Research Director, Opinionum

The FMCG category remains a powerhouse of brands that consumers are connected to. It provides over a fifth of the UK top 100 and has 15 brands in the top 50. Unlike other categories, there is something very comforting when you look at the top FMCG brands, household names that have been around for years that we all know and love, the likes of Cadbury, Walkers, Heinz and Colgate.

The future looks bright for those super power FMCG brands with our data looking very consistent across age groups; 18-34 year-olds connect with these brands just as much as those aged 50+. However, that isn't the case for all FMCG brands. Granted, this will be down to life stage in some cases; with more and more younger consumers struggling to afford to live on their own, they aren't as likely to be responsible for what goes in the kitchen cupboards. Nevertheless, the warning signs are there for some.

MCB Index ranking

	18-34s	35-49s	Over 50s
	84 th	56 th	33 rd
	96 th	52 nd	41 st
	88 th	77 th	72 nd

The leading tea brands paint an interesting picture, with household favourites of PG tips and Tetley both comfortably ranked in the top 50 amongst those aged 50+ but taking a significant drop, and in Tetley's case nearly out of the top 100, amongst 18-34 year-olds. Twinings however, albeit ranked lower overall, has a more consistent profile. Now you could argue that brands can't appeal to everyone, but in a category as ubiquitous as tea this must be worrying for PG tips and Tetley.

They aren't the only brands that have differing levels of connection across generations.

MCB Index ranking

	18-34s	35-49s	Over 50s
	23 rd	7 th	29 th
	36 th	67 th	69 th
	55 th	85 th	64 th
	82 nd	35 th	17 th

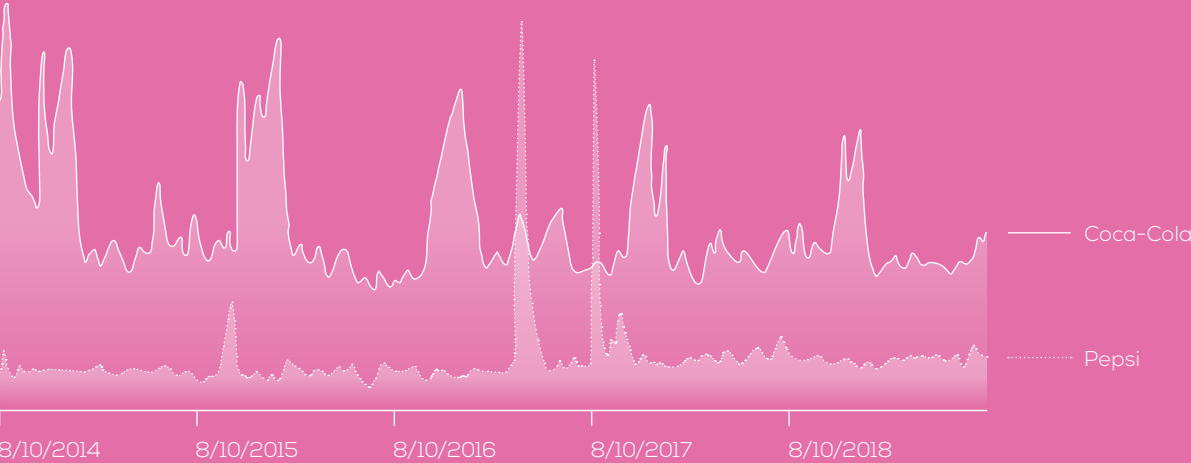
The dynamics between the two Cola giants is fascinating. Coca-Cola overall are more connected but with a sweet spot amongst

35-49 year-olds; however, Pepsi has a much stronger relative position amongst 18-34 year-olds. Guinness also has a much stronger connection with 18-34 year-olds, appealing to the younger generations want for something distinctive and different. The alarm bells could be ringing at McVitie's as they see a huge shift in consumer connection across generations.

This then begs the question: how do these heritage driven FMCG brands stay connected across generations?

Heritage is no bad thing; take Heinz for example successfully celebrating 150 years this year, moving from being first sold in Fortnum & Mason to becoming the store cupboard stalwart that it is today. However, you can't wallow in heritage and Heinz have also strongly embraced the need to innovate, creating new recipes and exploring new categories.

Google trends (UK)



As a whole, the FMCG category outperforms the other brands on all of our key metrics but brand Dynamism is a weak point. The Emotional connection with the top FMCG brands is very strong but keeping the conversation relevant and, more specifically, creating a ‘buzz’ around FMCG brands is harder.

Brands that buck the trend on this front are Cadbury, Walkers and Coca-Cola. Cadbury has remained true to core brand values, maximised seasonal opportunities such as Easter and Christmas, whilst delivering some lovely heartfelt campaigns like ‘Mum’s birthday’. Walkers have innovated their portfolio well in recent years and backed it with media investment, diverting spend across sub brands, Sensations, Oven Baked, Sun bites,

Tear ‘n’ Share, and Max to keep the brand relevant across demographics whilst also causing a stir by hooking up with the Spice Girls in 2019.

Going back to the arch cola rivals, looking at Google search trends it’s easy to see how, apart from a couple of ill-fated ad campaigns from Pepsi, Coca-Cola have maintained a much higher interest in the brand.

The challenge is thus for the major FMCG players to not lose the strong emotional attachment that consumers have to brands that they have grown up with, but find ways and means to keep the brand relevant and engaging across generations, without damaging the strong heritage that many of them have.



How to create an effective test & learn digital culture

Joe Harper, E-commerce Marketing Manager – Western Europe at Kellogg Company

If Digital Marketing options were restaurant dish choices, the World's top eateries would have to clear out their fridges and rewrite their menus on an almost daily basis. The ever-increasing number of channels and platforms from which we users can choose to spend our 'lean forward' and 'lean back' browsing hours create a never ending race that must be run in order for brands to stay ahead of the game.

Some general investment choices, such as Facebook and Video on Demand, have been around for a while and are generally perceived as here to stay, or a 'safe bet' for effectiveness.

Others, like Influencer Marketing and Twitter, ride the flavour-of-the-month rollercoaster and come under constant pressure to reinvent themselves in order to prove their worth within the advertising landscape.

What agencies and platforms perhaps don't consider is that a very similar pressure exists on the client side, as marketers strive to ensure their brand balances staying true to its tone of voice with the creation of effective, relevant content. They're expected to assess the right blend of strong (and measurable!) media performance metrics versus channel relevance

and suitability. The days of nervously laughing off the role of "The Facebook or whatever it's called!" whilst crossing your fingers in the hope that your agency partners are your Digital eyes and ears are long gone – the modern Brand Manager is expected to take questions like these in their stride. There's no hiding from it, particularly when your not-so-digitally-savvy marketing director knocks on your door for an update on where your latest Q2 budget pennies ended up being spent...

Whether it be a sideways-step to cover another brand within your portfolio, an internal

promotion or a new opportunity elsewhere, the reality is that the time each FMCG marketer spends working on one individual brand is often relatively short. Couple this with the current FMCG landscape, (Private Label threat the rise of the discounters and Brexit-inspired economic uncertainty) and it's perhaps natural that the choices which Brand Managers make tend to prioritise the immediate impact for their brand, and that there is less appetite to explore new, untried choices which may build the foundation for longer-term growth, albeit with small or immeasurable initial yield. Annual, Quarterly and even Weekly sales performance of your brand ▶

are the pegs on which you hang your hat when it comes to reviewing your personal performance.

Learnings from previously untried choices are invaluable to the business on a holistic level; however, it is difficult to maintain a culture of sharing this collective, common goal across differing brands (even more so categories and markets) where performance and budget constraints differ and vary so greatly.

So, we've identified the challenge for FMCG

brand marketers: to ensure the selection of measurable investment choices whilst addressing an insatiable desire from within the business to innovate and stay ahead of the curve.

If you can look at your organisation and say "we're already there on this" then great – hats off to you! However, if you still have work to do, here are a couple of tips on how to shape a truly effective test & learn culture:



Switched on and tuned in

James Nicandrou, Senior Researcher, Opinium

I want it all, I want it all, I want it all, and I want it now.

Consumers have never had a greater choice or control of the types of content they consume, leading to a sea change in the ways in which consumers watch TV shows, movies, and videos. There has been a significant shift towards streaming and production of online content away from traditional terrestrial and satellite TV in recent years and this will continue with no end in sight.

Huge media and entertainment brands continue to put enormous production budgets behind shows to create immensely popular programming to be the next Game of Thrones or Breaking Bad. It'll take over four years for you to watch everything on Netflix, and on average 100 hours of content is uploaded to YouTube every minute. This not only leads to a greater choice for viewers but also results

in a considerable amount of quality programming. This resonates with the UK, placing five media and entertainment companies within the top 30 Most Connected Brands 2019.

MCB Index ranking

	2018	2019	
YOUTUBE	6 th	8 th	↓ -2
NETFLIX	30 th	11 th	↑ +19
BBC	4 th	19 th	↓ -15
DISNEY	38 th	29 th	↑ +9
SKY	62 nd	32 nd	↑ +30
VIRGIN	58 th	64 th	↓ -6

This is a successful time for entertainment brands especially for YouTube and Netflix, as online-only brands continue to dominate the entertainment industry and rank highly. YouTube has maintained its top ten rank whilst Netflix soars up 19 places compared with last year's report. Other brands that feature in the top 30 are the staples of the UK entertainment industry. Giant brands such as Sky and Disney feature lower down the list than YouTube and Netflix, but Sky has notably jumped up 30 places.

With so many rival brands competing for the same number of viewers, brand loyalty is hard to build. Viewers have many accounts with different brands, only choosing what to watch based on content rather than brand values. However, the UK does feel a strong connection with the entertainment brands but why is this?

The secret behind the success in our metrics for this entertainment sector is 'Buzz'. This is the ability and the extent to which a brand creates excitement and anticipation. Media and Entertainment companies rank exceedingly well in the UK; four out of the top ten brands for the metric 'Buzz' are in the entertainment category. These brands are effective in creating a following about the brand and/or programming, meaning that they are always at the forefront of consumers' viewing habits and so merit their place as some of the UK's Most Connected Brands. ▶

Buzz ranking

Netflix	2 nd	YouTube	6 th
BBC	10 th	SKY	11 th

Alongside 'Buzz', personalisation and customisation are important drivers here. Consumers want to be valued as individuals rather than a pound sign, so creating brands which value and cater for individuals will always prosper and grow brand loyalty. It's no secret that YouTube and Netflix use algorithms to show programs similar to previous viewing habits and make educated recommendations for viewers to get their content fix. This keeps viewers coming back to the brand time and time again and leaves the more rigid entertainment competitors behind.

This customisation of programming extends into how their programming is

viewed; downloadable content is now the norm with an increasing amount of programming being viewed 'on-the-go'. This produces the perfect storm for viewers (particularly the youngest generation) to watch what they want, when they want, where they want, across whichever device they want.

The threat to this category is entirely internal, poor content equates to poor engagement as viewers tend to not be brand loyal. In a crowded category the challenge will be to continually produce high quality programming whilst maintaining the personal connection the brand has with the viewer.



The second wave of streaming disruption is here. Are you ready?

Rahul Titus, Head of Influence, Ogilvy

We already know that the internet revolutionised access to media. And, for the behemoth businesses that produced film and television before this shift, consumers' newfound preference for streaming content has nearly sunk them.

But now that the dust has settled, those very same businesses have begun to catch up.

Disney, BBC and many other studios have already waved a white flag of sorts – deciding that, instead of fighting against dwindling ratings and box office sales, it was better to compete with Netflix directly by offering the same service.

Of course, Big Tech wants your eyeballs, too. Amazon Prime and Apple TV are already hot and, on the market, and Facebook recently announced the release of its Portal device.

If you can't beat 'em, join 'em.

In the UK, the average person now spends eight hours each day consuming media. And, for any business,

all of that time is valuable – because, as a consumer, your attention is the new currency.

Of course, streaming content is not an end in itself – and it's not why Netflix has been so successful. If its meteoric rise can be attributed to a single thing, then that thing is understanding consumers' preferences, both at scale and as individuals.

We're now in the wake of the so-called 'streaming scramble,' which presents a fundamental change in the landscape of entertainment. While consumers formerly had to choose between Netflix and going to the movies, or Netflix and watching cable TV, they now have to choose between Netflix and a bunch of other services trying to provide basically the same thing.

And, as subscribing to all of available streaming services would cost around £1,450 a year (we did the maths), consumers will certainly have to choose.

It will be interesting to watch.





Introducing the Most Connected Brands US



We're opening our first overseas office, and it just had to be in the US. Madison Avenue, New York, to be specific. To celebrate this, I'm delighted to present you with, 'The Most Connected Brands US 2019'. A snapshot version this year, but in 2020 we'll certainly give it the full attention it deserves online and in print.

Why the US?

Well, apart from the fact that we've been conducting research amongst US consumers for over 10 years and we now have a brilliant group of lovely clients over there we need to support, it is also an incredibly large, powerful, and a really interesting market to enter. American consumers are fascinating and not just because they spend a ton of money on the brands listed in our index, but they often set the trends that brands around the world follow.

With an improving economy and increasing employment levels, consumer confidence and spending is on the up, but as with the UK, the economic crisis led to a growing price consciousness among American consumers. However, this hasn't necessarily meant that they're completely switching to less expensive brands in any huge numbers. Instead they appear to be staying loyal to their favourite brands, but where possible finding innovative ways to spend a bit less on them. Millennials are leading the way in this regard by now accessing brands through the sharing economy, borrowing, buying them second hand, or still purchasing but just a bit less often.



James Endersby
CEO,
Opinium

The top 100 Most Connected Brands US



01	amazon	02	Google	03	HERSHEY'S	04	m&m's	05	NETFLIX	06	OREO	07	SAMSUNG	08	YouTube	09	Kellogg's	10	Crest	11	DAWN	12	Doritos	13	Microsoft	14	Coca-Cola	15	Walmart	16	CLOROX	17	Apple	18	Lays	19	Disney	20	Tide
21	Kraft	22	Colgate	23	Dove	24	HEINZ	25	Target	26	Lysol	27	FedEx	28	McDonald's	29	Bounty	30	General Mills	31	hp	32	SONY	33	M&M'S	34	Nestle	35	Charmin	36	NIKE	37	facebook	38	Gillette	39	Chick-fil-A	40	LG
41	Johnson & Johnson	42	Hanes	43	TOYOTA	44	pepsi	45	STARBUCKS COFFEE	46	DELL	47	DUNKIN'	48	BURGER KING	49	Dr Pepper	50	CHEVROLET	51	GE	52	KOHL'S	53	HONDA	54	Nintendo	55	Domino's	56	Ford	57	verizon	58	Tyson	59	adidas	60	hulu
61	Under Armour	62	Bath & Body Works	63	HBO	64	TRADER JOE'S	65	KFC	66	Folgers	67	PlayStation	68	Suave	69	FOX	70	AT&T	71	SKECHERS	72	Neutrogena	73	COSTCO WHOLESALE	74	XBOX	75	VANS	76	OLAY	77	OLD NAVY	78	PANTENE	79	ALDI	80	Gain
81	ARNY DENT	82	NEW BALANCE	83	Reebok	84	L'ORÉAL	85	PURINA	86	MAXWELL HOUSE	87	VICTORIA'S SECRET	88	CONVERSE	89	IBM	90	macy's	91	Kroger	92	Old Spice	93	AMERICAN EXPRESS	94	PUMA	95	RALPH LAUREN	96	COACH	97	Budweiser	98	DODGE	99	Kirkland's	100	GAP

The next brand/consumer dynamic

The view from the US

Jamie McCracken, Head of Agency, NYC, Protein



The biggest opportunity and issue facing brands today is their changing relationship with consumers. In the past, the brand-consumer relationship was very much top-down, brands were completely in control as they defined and constructed aspirational worlds that their consumers bought into without too much thought. Now, we're witnessing a shift in power as increasingly conscious and informed individuals move away from blind allegiances to brands and begin to explore what's personally right for them. We're entering a consumer-first landscape where relationships with brands are symbiotic, not top-down, and based on a system of shared ideals, values and mutually beneficial interactions. Consumers' expectations of brands have exponentially increased.

This increase in expectations is being driven by three key consumer changes - a desire for action, a movement towards self-realization and a need for subjectivity.

A desire for action

The US is in a state of unrest and there's a growing feeling of helplessness in the face of nationwide and systematic issues related to social, economic and environmental unrest. Progressive consumers are trying to abate and modify their personal behaviors, from recycling plastic and buying "better" to embracing their local community and protesting for social justice, but they're acutely aware of the limit of their impact. Their trust in government to implement changes for a brighter future is on the wane so they're turning to big brands and demanding they use their social power and cultural influence to lead by example, educate the masses and take action on the issues that they've played a part in creating. US companies are taking note; in August this year 181 big businesses' CEOs pledged that their firms' purpose was no longer to serve their owners alone, but customers, staff, suppliers and communities, too.

A movement towards self-realisation

Today's progressive US consumers have matured in a landscape of over consumption, over branding and shortening trend cycles and they've discovered that it's emotionally, financially and environmentally unsustainable to continue down this path. Constant access to information means they're increasingly informed, opinionated and conscious in the decisions they make. They're beginning to realize that the only way to feel fulfilled in their brand interactions is to know what they personally stand for and to find the institutions that align with their values. We're seeing a wave of empowered consumers shifting away from externally validated groupthink and into a space where they're making product and brand choices based on internally defined values and personal needs.

A need for subjectivity

Institutions and establishments are consistently exposed for abusing their authority while media and brands are scrutinized for misrepresenting and misleading society. In this post-truth world, trust and transparency are at a premium. Consumers are tired of seemingly objective institutions misrepresenting reality so they're seeking out subjective opinions so they can form their own point of view. This need for subjectivity is funneling down into their relationship with brands. They're on a journey to find brands that have a clear POV so they can make an informed decision on who they want to align their identity with and support with their dollars. They're demanding total transparency and for brands to make a clear stand in terms of their beliefs and ideals. ▶

The next brand/consumer dynamic

Protein has interviewed countless consumers over the past year about their relationship with, and expectation of, brands and the same examples were discussed time and time again as capturing their attention, adding value to their lives and as moments where they felt brands truly understood and connected with them.

Brands doing it well

Nike's Just Do it – Dream Crazy 2018 / Dream Crazier 2019

The 2018 ad narrated by Colin Kaepernick shows a series of amateur individuals and professional athletes overcoming adversity and striving to become the best ever in sport. The idea of being the “best ever” arguably didn’t land with US consumers as they’re now more focused on personal progression and more relatable/realistic aspirations, but the main narrative of “believe in something, even if it means sacrificing everything” was hugely impactful. Consumers loved the fact that Nike took a risk in supporting a divisive figure in Kaepernick and in doing so made it clear that they stood for social justice and racial equality. This ad was celebrated as genuine and authentic as it was viewed as a risk to Nike’s profits and universal popularity as critics, including Trump, took to social media to boycott the brand and others even burned their products.

Chobani's – #WarwickPublicSchools

Chobani CEO Hamdi Ulukaya is well known for his commitment to social good and in May 2019 he continued to action his values. Ulukaya paid \$50,000 to help schoolchildren clear their lunch debts after it was announced those with unpaid bills would only be allowed peanut butter and jelly sandwiches. Consumers often talk about how hard it is to relate to faceless corporations, and the importance of understanding who’s in the boardroom making the decisions, so Ulukaya’s use of his personal Twitter to urge other businesses to tackle childhood hunger really humanized the brand and its values.

The New York Times – Truth Has a Voice

Building on its award-winning “Truth” platform, the New York Times created the “Truth Has a Voice” ad series. The series launched content at important events and key cultural moments that seemed to ignore or brush aside issues around inequality or ignore the truth. The latest ad focused on the gender pay gap, releasing content to coincide with the U.S. Open semi-finals. The ad highlighted the paper’s historical commitment to covering gender inequality and female athletes’ protracted battle for equal pay. ▶

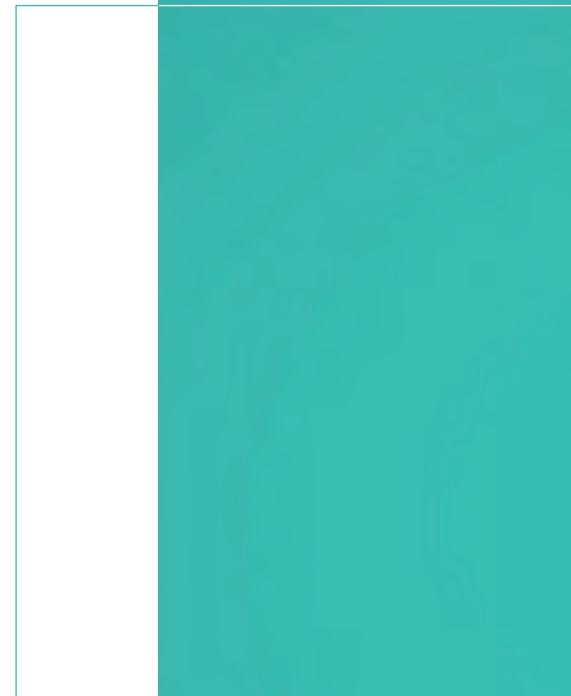


What we've learned from these case studies is that good is the new cool. The brands that are making a memorable impact on consumers are the ones bringing meaning to their campaigns and initiatives. Purpose brands, and brands with a purpose, are fast becoming the only ones that progressive American consumers are happy to openly align themselves with.

Two brands that I was surprised did not make the list, and that I'm sure will make future lists, are Patagonia and The North Face. Culturally speaking, outdoor brands are having a real revival as urban escape pursuits continue to grow in popularity and the outdoor design aesthetic begins to infiltrate mainstream fashion. More importantly, these brands' buyback and repair programs are viewed as increasingly important by the next wave of conscious consumers.

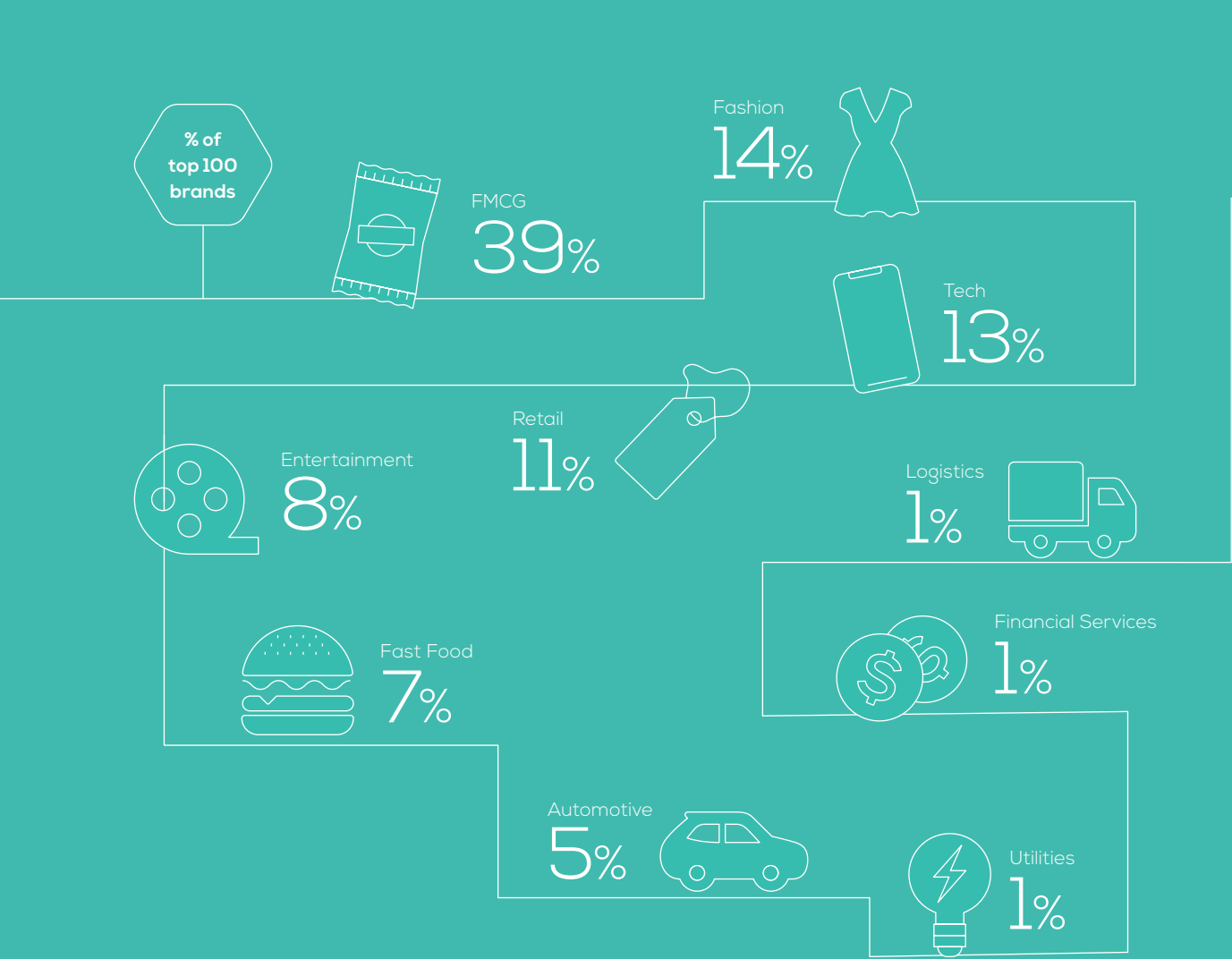
Brands that are beginning to readdress the concept of ownership and take responsibility for the full lifecycle of their product, from the cradle to the grave, are the ones that are setup for long-term and sustainable success. Brands like adidas with their, currently in beta stage, FUTURECRAFT.LOOP program that creates 100% recyclable performance running shoes that can be returned to the brand every season and repurposed, not into lesser goods like bags or bottles but into the next iteration of the brand's high-performance shoe.

Brands that take risks by clearly standing for something, actioning their values, and by becoming leaders of positive change are the ones that are making a memorable impact now and are futureproofing their status as the Most Connected Brands.



US market overview

Breakdown of the top 100 Most Connected Brands US



Top 10 split by age				
	18-22	23-35	36-55	56+
1 st	NETFLIX	GOOGLE	AMAZON	AMAZON
2 nd	GOOGLE	AMAZON	GOOGLE	GOOGLE
3 rd	YOUTUBE	NETFLIX	OREO	CREST
4 th	OREO	YOUTUBE	DAWN	M&MS
5 th	DORITOS	DORITOS	SAMSUNG	HERSHEY'S
6 th	LAY'S	NIKE	HERSHEY'S	DAWN
7 th	VANS	SAMSUNG	YOUTUBE	KELLOGG'S
8 th	NINTENDO	HERSHEY'S	NETFLIX	APPLE
9 th	AMAZON	M&MS	M&MS	CLOROX
10 th	HERSHEY'S	OREO	DORITOS	COCA-COLA

Watch outs

Apple losing its connection?

Apple **17th** overall

Emotional connection **48th**

Trouble at the Golden Arches?

McDonald's **28th** overall

Customer satisfaction **88th**

Social media that isn't that social?

Facebook **37th** overall

95th in terms of social responsibility

A tale of two giants

Key differences in ranking by political leaning

As the US political landscape remains deeply divided, distinct differences in voters' connection to key brands have emerged

Voted for 
Hillary Clinton

Voted for 
Donald Trump

MCB Index ranking

NETFLIX	3 rd
YOUTUBE	6 th
TARGET	11 th
COLGATE	13 th
APPLE	14 th
DAWN	20 th
CLOROX	21 st
NIKE	25 th
TIDE	27 th
BOUNTY	36 th
NABISCO	45 th
ADIDAS	52 nd
LG	53 rd
CHICK-FIL-A	64 th

MCB Index ranking

DAWN	3 rd
CLOROX	8 th
CHICK-FIL-A	9 th
TIDE	11 th
NABISCO	15 th
YOUTUBE	20 th
NETFLIX	21 st
BOUNTY	22 nd
APPLE	25 th
LG	28 th
COLGATE	31 st
TARGET	49 th
NIKE	71 st
ADIDAS	75 th

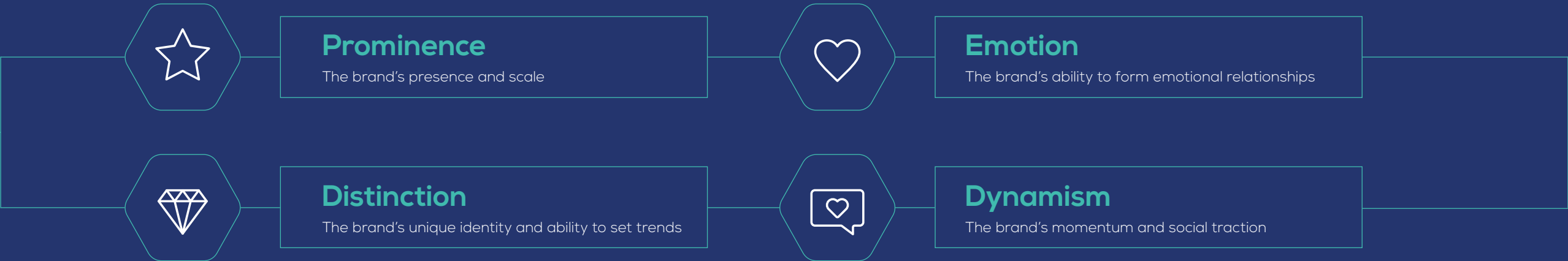




Methodology

How we ranked the top 100 brands

We conducted a nationally representative study amongst 4,000 consumers (UK 4,217 and US 4,033). Based on our experience of evaluating brands via our Brand Strength Index 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 was 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	Value for money
Recommendation	Social responsibility
Delivery on needs	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 & 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 synthesising all three data sources and applying a rank order, we established how each brand performs on three different consumer metrics:

1

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 (UK 10,385 and US 18,213) from our sample of 2,000 consumers (UK 2,000 and US 2,536) and identified the top brands mentioned (UK 183 and US 415).

The brands consumers think about

2

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.

The brands consumers talk about

3

Brand revenue

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

The brands consumers buy



Key contributors

Key contributors



Adam Drummond
Associate Director,
Opinium

✉ adamdrummond@opinium.co.uk

Adam is an Associate Director and partner at Opinium, heading up our political polling team and working with clients ranging from giant consultancies like PwC to single-issue campaign groups and charities. His background is in thought leadership, distilling complex issues into their component parts so that research participants can give informed responses.



Adam Wilson
Associate Director,
Opinium

✉ adamwilson@opinium.co.uk

Adam specialises in global, online research using quantitative and qualitative research to help some of the world's leading brands understand their audiences, develop new products and communicate effectively. He has a particular focus on financial services, energy and technology.



Adrian Day
Consultant

🐦 @adrianday1
✉ adrian@dayadvisers.com

Adrian is an independent brand and business consultant with many years' experience gained working in leadership and consulting positions at market-leading firms including Landor and Siegel & Gale. He has advised clients such as Accenture, Nokia, GE and Shell on their brand strategy, communications and identity.

Adrian is experienced at brand and customer research, brand strategy and designing brand engagement, communications and implementation programmes.



Alec Rattray
Consultant

✉ alec.rattray@live.co.uk

Alec Rattray is a highly experienced strategy consultant who focuses on brand and culture.



Alexa Nightingale
Associate Director,
Opinium

✉ alexanightingale@opinium.co.uk

Alexa is an Associate Director at Opinium and heads up the financial services division. Her experience comes from across the financial services category, working across consumer and business audiences for challengers through to iconic global brands.



Ande Milinyte
Senior Researcher,
Opinium

✉ andemilinyte@opinium.co.uk

Having focused on behavioural economics and data analysis during her Economics degree, Ande has a deep interest in human behaviour and decision-making. Ande's background is strongly rooted in brand tracking and communications testing. Her experience includes measuring the brand impact of a complete brand overhaul for an automotive brand, campaign pre-testing for a leading UK bank and continuous communications tracking for the maker of one of the most popular global mobile games, among other projects.

Key contributors



Beverley Aujla
Director,
Lansons

🐦 @BevAujla
🌐 bevaujla

Bev is a seasoned communications practitioner who has built her career advising brands in the B2C space for over 10 years and creating call to action strategies.



Brigid McMullen
Managing Director,
Workroom

🐦 @The_Workroom
✉ b.mcmullen@workroom.co.uk

Brigid brings 25 years of purpose-driven strategic creativity to illuminate and invigorate global brands such as Coty, adidas, RB, Balfour Beatty and Scouts.



Carolyn O'Meara
Research Manager,
Opinium

✉ carolynomeara@opinium.co.uk

Carolyn is a Research Manager at Opinium and works primarily in brand and communications research within the FMCG and retail sectors. She has worked with many household name brands, helping them to optimise and refine customer experience and communication strategies through unravelling the influences behind consumer perceptions and decision making.



Chris Walts
Strategy Lead, Social,
Ogilvy

🐦 @chriswalts
✉ chris.walts@ogilvy.com

Chris has over nine years' experience developing social and digital projects and uses his creative thinking to design real world marketing strategies that deliver tangible business results for his clients. He co-leads the social strategy offering at Ogilvy UK.



Colin Haddley
Director of Strategy, Insight,
Capability & Marketing Services,
The KraftHeinz Company, EMEA

Previously, Colin worked across a number of industries with Molson Coors, Kimberly Clark, RBS and Brand Learning. He studied Biological Sciences at Durham University and has an MBA from Lancaster University.



David Johnson
Senior Researcher,
Opinium

✉ davidjohnson@opinium.co.uk

David is involved in research in the brand and communications as well as thought leadership practice areas. He has contributed to domestic and international research, across various sectors, to provide clients with valuable insight into consumers' attitudes and behaviour. David enjoys harnessing the power of visual and audio outputs to connect clients with consumers.

Key contributors



Doug Gurr
UK Country Manager,
Amazon
🐦 @AmazonNewsUK

Doug is UK Country Manager for Amazon and is responsible for leading the company’s UK strategy, consumer e-commerce business, digital content and device offerings, as well as helping to guide Amazon’s UK innovation programmes.



Emily Dickinson
Director,
Opinium
✉ emilydickinson@opinium.co.uk

Emily specialises in engaging with key opinion former and consumer audiences on behalf of both private and public-sector clients to help shape communication strategies, evaluate market trends and increase the strategic responsiveness of their organisations. She sits on the advisory board for Loughborough University’s Online Civic Culture Centre for Doctoral Training which is studying the impact of social media on the spread of misinformation, disinformation and the rise of hate speech and incivility.



Hannah Teale
Associate Director,
Opinium
✉ hannahteale@opinium.co.uk

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
Research Manager,
Opinium
✉ jacktadman@opinium.co.uk

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 Vodafone 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.



James Crouch
Research Manager,
Opinium
✉ jamescrouch@opinium.co.uk

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
Chief Executive,
Opinium
🐦 @jamesenders
✉ jamesendersby@opinium.co.uk

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.

Key contributors



James Nicandrou

Senior Researcher,
Opinium

✉ jamesnicandrou@opinium.co.uk

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.



Jamie McCracken

Head of Agency, NYC,
Protein

✉ jamie@prote.in

Jamie spends his time designing, managing and producing quantitative and qualitative led consumer and market insight reports and brand strategies. His work has been communicated through magazines, films, workshops, and industry reports and has helped brands understand their consumers, innovate in their product category and shape their marketing and long-term strategy.

Jamie’s global experience and in-depth understanding of consumer attitudes, behaviors and motivations has helped a diverse range of brands from Nike, adidas, PUMA, Converse and Red Bull to Google, HSBC, Diageo, PepsiCo, and Microsoft.



Jenny Bates

Senior Operations Executive,
Opinium

✉ jenniferbates@opinium.co.uk

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.



Joseph Curran

Research Executive,
Opinium

✉ josephcurran@opinium.co.uk

Joe is a Research Executive at Opinium working across brand and communications, thought leadership and product and service development for clients such as Not on the High Street, Berry Garden Growers 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.



Joseph Harper

E-commerce Marketing Manager,
Western Europe,
Kellogg Company

Joseph is eCommerce Marketing Manager for Kellogg’s Western European business and is based at the American multinational FMCG company’s Manchester headquarters. Joseph works across Kellogg’s ever-increasing portfolio, which covers established global cereal brands from Corn Flakes to Special K and snacking giant Pringles, plus the new multi-award-winning innovative breakfast range W.K. Kellogg.



Josh Glendinning

Associate Director,
Opinium

✉ @joshglendinning
✉ joshglendinning@opinium.co.uk

Josh enjoys the challenge of translating complex issues and research into actionable insights. With a background in strategic and creative communications, he has research experience across brand and communications, thought leadership and stakeholder engagement. He has worked across the charity, financial services, and technology sectors.

Key contributors



Kate Jalie
Director,
Opinium

Kate has worked in market research for 12 years and was made a partner of Opinium in 2013. She specialises in research for PR and thought leadership and has worked on a wide range of consumer, B2B, healthcare and international projects using a variety of qualitative and quantitative methodologies tailored to deliver maximum impact for each campaign.



Les Wilcock
Managing Director,
Outpost

Outpost is an independent creative agency working across advertising, branding, design and digital. They develop smarter strategies and execute them in exciting, persuasive integrated campaigns which make brands stand out from the crowd.

A marketer with experience extending over 40 years, 20 of which were as a client followed by management consultancy with KPMG, advising clients on marketing across a diverse range of sectors. He moved from client side to agency in 2004. Les is also an experienced Non Executive Director having spent 6 years at Stockport NHS FT Trust.



Liam McCloy
Food and Drink Lead, EMEA,
FleishmanHillard Fishburn

Liam has spent over 20 years providing consultancy support to food and drink brands and businesses right across the supply chain.

He specialises in helping clients navigate often complex political and regulatory climates which impact their brand and corporate reputation and their licence to operate.



Lisa Gulley
Planning Director,
Red Brick Road

With 20 years of studying consumers and delivering insight-driven, through-the-line strategic planning, Lisa is currently Red Brick Road's Planning Director, building brand followings that deliver consumer connection and commitment for brands such as Suzuki, Jägermeister, L'Oreal, Hilton and Just Eat.



Matt Muir
Senior Consultant,
Grayling

Matt has two decades experience in communications, specialising in digital. He is a senior consultant in Grayling's IGNITE team - the agency's strategic and creative hub.



Olivia Playle
Senior Researcher,
Opinium

✉ oliviaplayle@opinium.co.uk

Olivia specialises in online international research in a number of sectors such as technology, finance, and healthcare. She has extensive experience working with brands globally to produce news provoking or actionable research. Olivia, previously working at a digital consultancy has a vast array of experience working with different brands to enhance their status digitally.

Key contributors



Rahul Titus

Head of Influence,
Ogilvy

🐦 @rahult90

Rahul has been a prominent player in the world of influencer marketing from its infancy. He is currently the Head of Influence at Ogilvy, where he runs a dedicated team to help clients navigate this increasingly complex space. Prior to this, he established and ran MediaCom’s global influencer offering, responsible for award winning influencer work on a diverse portfolio of clients including Shell, Revlon, Coke, P&G and Sony.



Steve Looney

Research Director,
Opinium

✉ stevelooney@opinium.co.uk

Steve has 15+ years of experience working in market and consumer research and has delivered insights for clients from small start-ups through to iconic global brands.



Tom Savigar

Senior Partner,
The Future Laboratory

🐦 @thefuturelab

Tom Savigar is a Senior Partner at The Future Laboratory. Today, he works across the business to help the likes of Absolut, lululemon, Jameson, The North Face, L’Oreal, UBS, Selfridges, Sony and Cartier to make a better future happen. Since Tom was a teenager, he has been tracking consumer trends and has a particular passion for the Emotional connection people feel with brands, products, retailers, marketing and services, and how brands can better resonate with consumers accordingly in the future.



Tony Langham

Chief Executive,
Lansons

Tony is Chief Executive of Lansons, the leading reputation management consultancy he co-founded in 1989. He is also a non-executive Chairman in the financial technology, market research and horse racing industries.

His first book Reputation Management: The Future of Corporate Communications and Public Relations was published by Emerald Publishing in December 2018.



Wez Eathorne

Research Director,
Opinium

✉ wezeathorne@opinium.co.uk

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 the stark differences evident in the study in connection and what it represents to different generations.



What people think,
feel and do

Let's chat

research@opinium.com

opinium.com

 [@mostconnectedUK](https://twitter.com/mostconnectedUK)

mostconnectedbrands.com