



What people think,
feel and do



The Most Connected Brands 2021

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



Who we are

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

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Why Most Connected?

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



Foreword

What does it mean to be connected in a year like no other?

This is probably the question we have been asked more than any other over the course of the pandemic. How has connection changed? What does it mean? How can we be both physically distanced and yet closer than ever? And ultimately, what impact does this have on the brands and businesses that shape our lives?

Most Connected Brands was first published in 2018 – born out of the idea that whilst there was already a proliferation of brand rankings available, all these indices used a black box analysis that was defined by experts working in the industry. None of them simply asked the

people who have the power to build, define and sometimes destroy the brands that marketers create: the consumers themselves.

Fast forward four years and the idea of asking the people, and reflecting the human, lived experiences of the pandemic has never been more relevant. This year's ranking is forged in the collective shared experiences of lockdown and loss, but also resilience, hope and opportunity. It is truly a ranking of our time.

As restrictions start to ease across the UK, our belief remains that building connection has never been more important. Whatever your political, economic or social viewpoint, 2020 has been a year of unprecedented rapid change that 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 reports interests, excites and inspires you to create, build and grow the connections that matter to you regardless of the circumstances.



Alexa Nightingale

Director,
Opinium



Emily Dickinson

Director,
Opinium

A change of direction

Jack Tadman, Senior Research Manager, Opinium
Priya Minhas, Research Manager, Opinium

Since March we have tracked attitudes towards the pandemic, the way our government has reacted, and produced over 20 reports exploring the changes that have occurred to society and the impact this has had across a multitude of sectors.

So where are we now?

Well, in a less cohesive place than you might imagine.

Our latest research has showed that the UK is split in both expectations and aspirations of a post-pandemic life, which poses an interesting question for brands.

Are you going to be the same old brand as before, back to the good old days? Or are you refreshed and reinvented as lockdown lifts?

To find answers, a handy bit of market orientation might be in order.

At Opinium, we found that consumers attitudes towards the future, what they want to hear from brands and even their values have been shaped by their experiences over the last year.

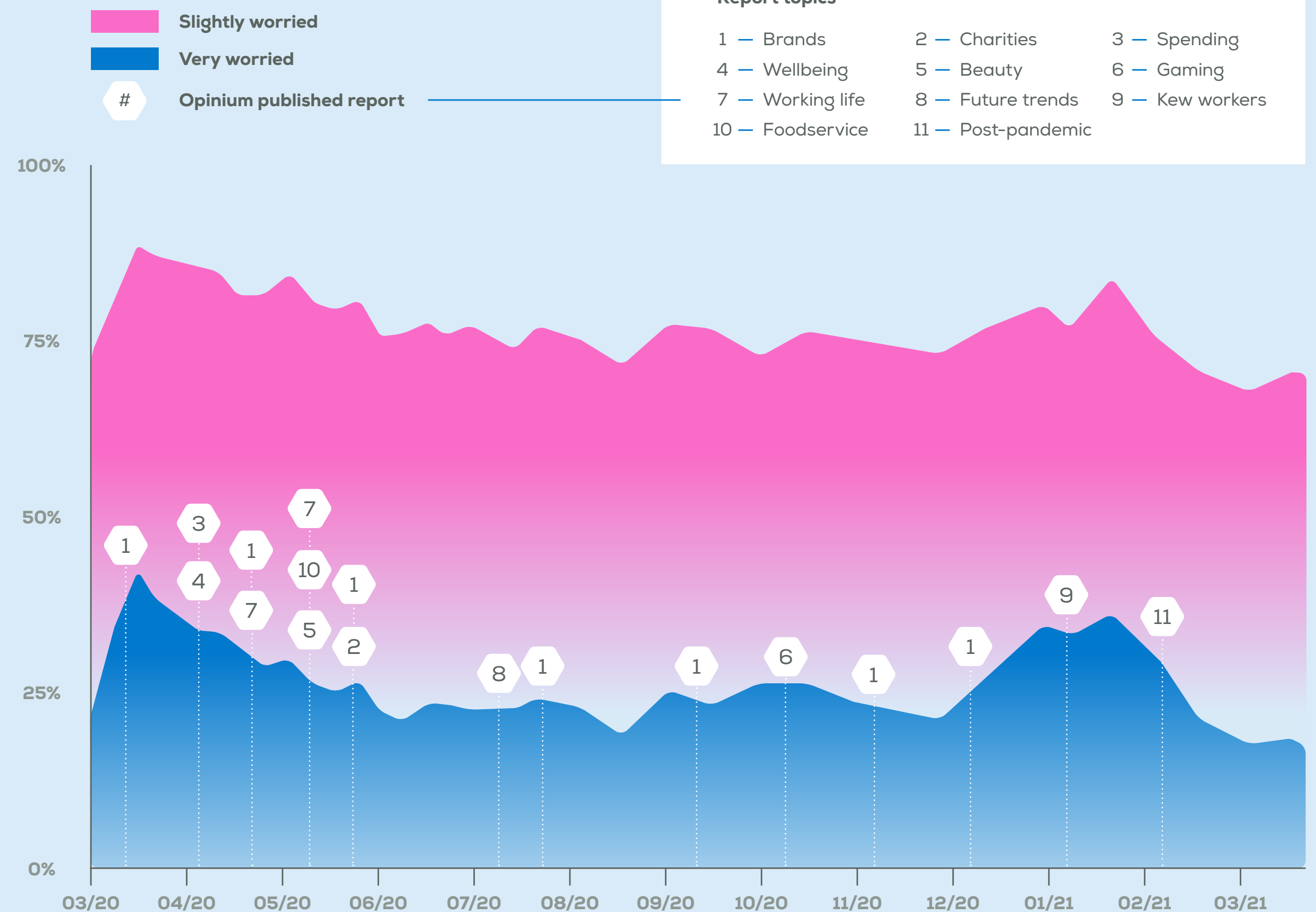
Do you know how your customers have fared?

If not, it's time to find out.

The economy is gearing up for a boom, concern is declining, and those spending habits consumers have picked up are going to put to the test as society re-opens (and hopefully stays that way). There will be plenty of winners, but also plenty of losers, and without keeping on the pulse of how society rapidly expands, shifts, and reforms, your brand might get left behind.

This Most Connected Brands report comes at a pivotal time; treat it as the benchmark, the starting line, as we gear up for an explosive rest of 2021. ▶

Consumer concern about Coronavirus



Things people have missed most during lockdown



63%

Seeing my family / friends



44%

Going on holidays



42%

Eating in a restaurant



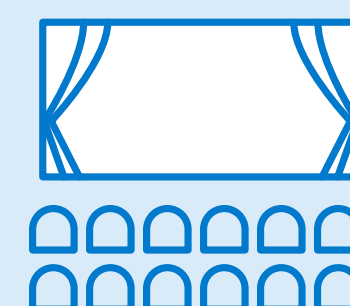
26%

Going to the pub



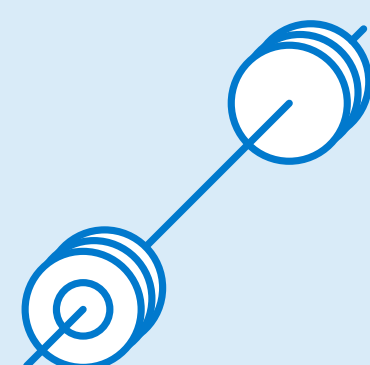
23%

Going to a café



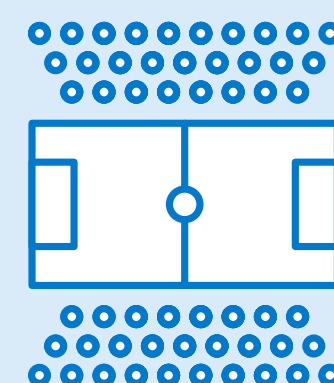
20%

Going to the cinema / theatre



10%

Going to the gym



9%

Watching sports live



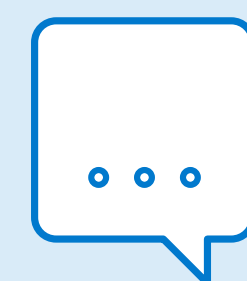
7%

Playing sports



5%

Working in an office



5%

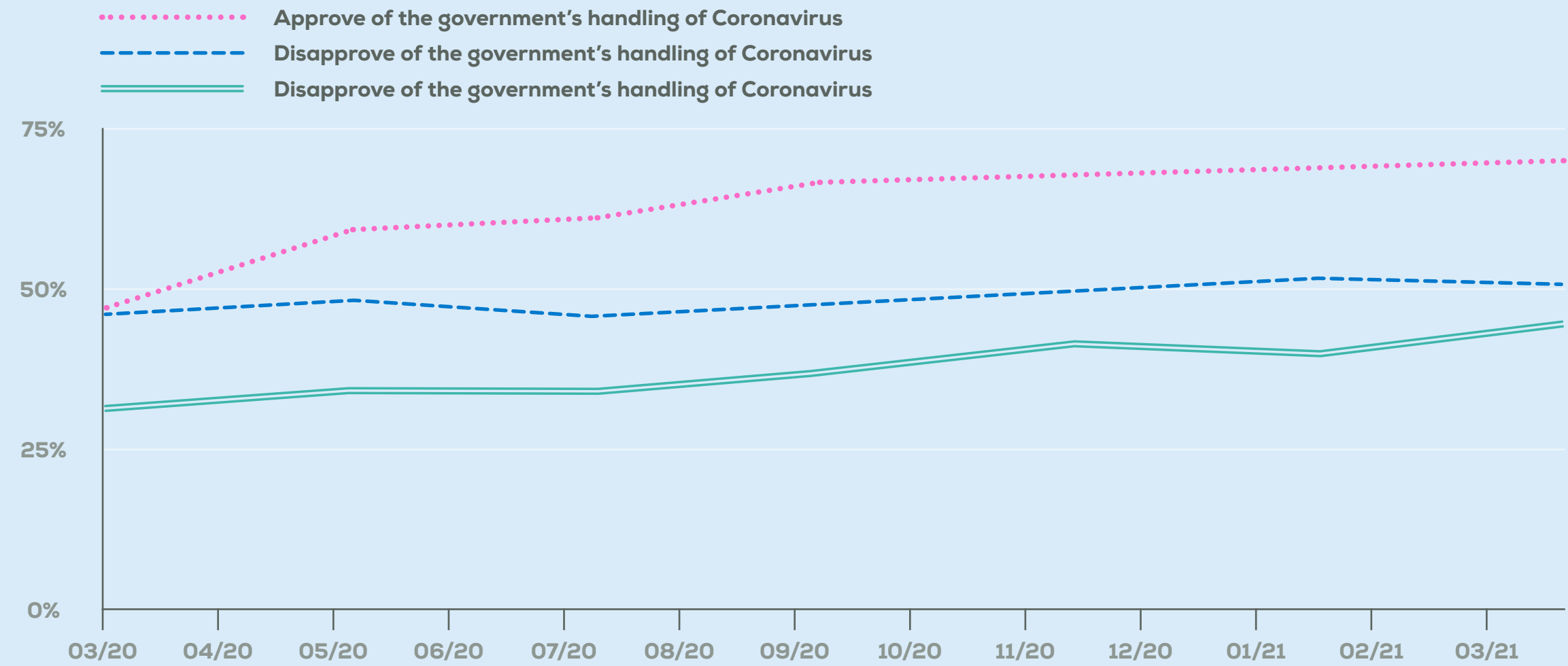
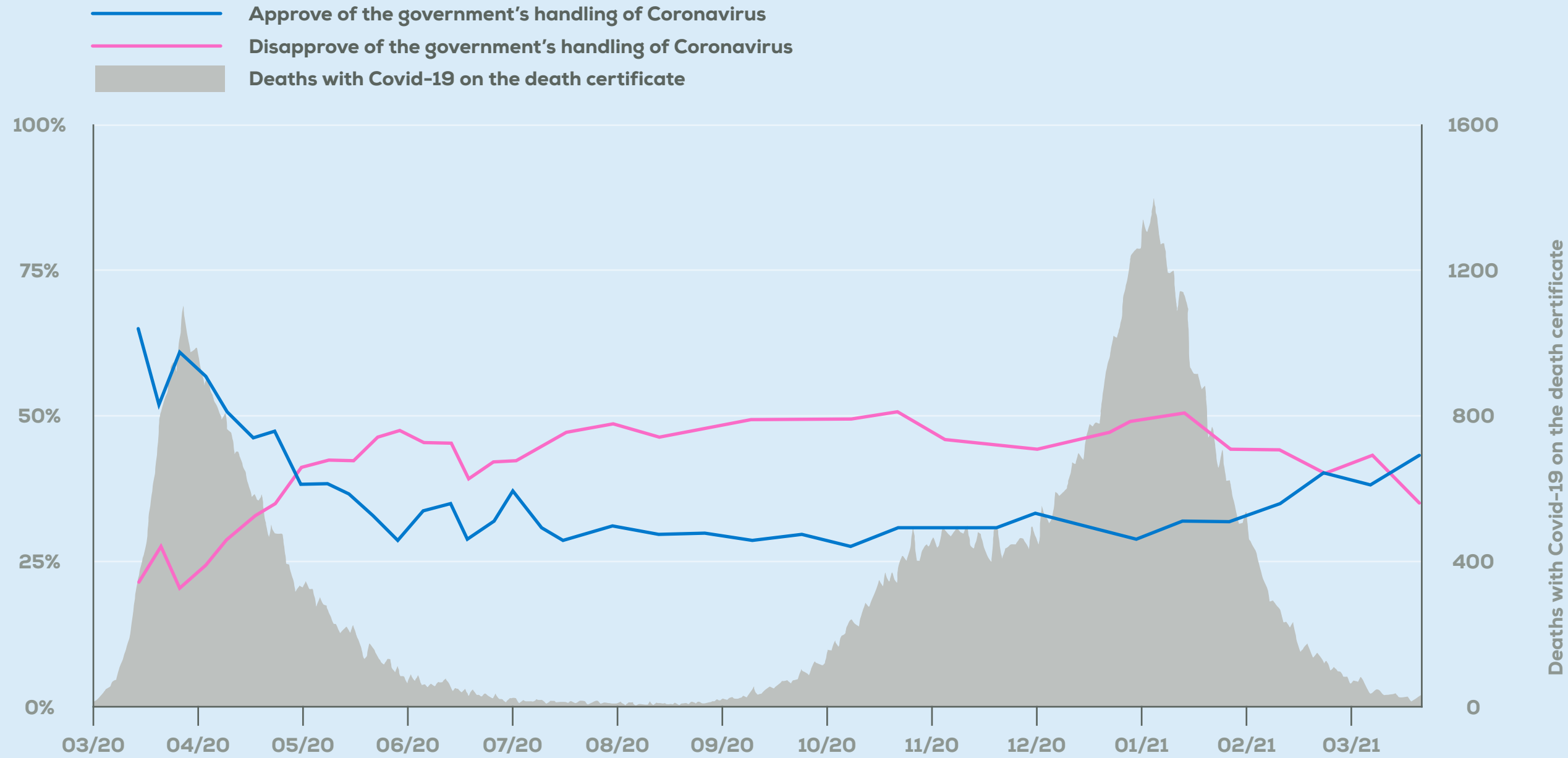
Other



6%

N/A - I have not missed anything

41% say that they want society to go back to the way it was pre-pandemic, whilst 45% want to build on the changes the pandemic has forced.



A year of missing out

It has been a long and intense year of on and off lockdowns. Social limitations and closures of many places have greatly affected all of our lives.

For much of the past year, the public were critical of the government's approach to handling the pandemic feeling that the government was underreacting and too slow. Opinion became more favourable due to the success of the vaccine program. The success of this program has led to the government producing a roadmap for easing restrictions in England; which is perceived to be the right pace for the majority (54%) of those living in England.

With many now happy with the pace of change, as society re-opens, brands will want to capitalise on providing experiences that chime with what people crave and have missed. People have missed seeing their friends and family. But they also very much missed the social scene of being able to go to a pub, eat in a restaurant, visit a café or watch a movie in the cinema.



Who we spoke to

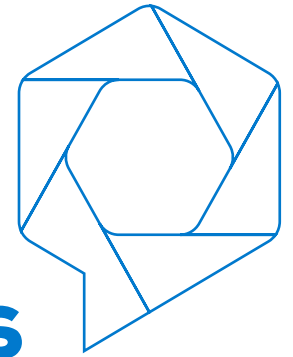
6,000 Consumers

5,514 Spontaneous
brand mentions

46,256 Brand
reviews

What it means to be Most Connected

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



The Most Connected Brands Index (MCB Index)

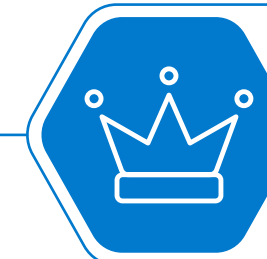
The MCB Index is the combination of four key brand metrics which are weighted together to produce a one-number summary of a brand's ability to connect with consumers.

We measure connection across four key characteristics:



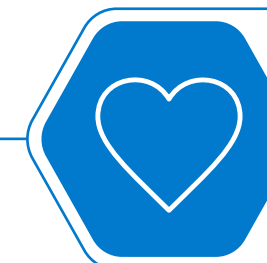
Prominence

The brand's presence and scale



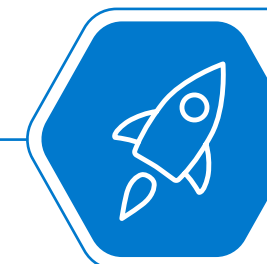
Distinction

The brand's unique identity and ability to set trends



Emotion

The brand's ability to form emotional relationships



Dynamism

The brand's momentum and social traction

The Top 100 Most Connected Brands UK



The Most Connected Brands 2021

01	02	03	04	05	06	07	08	09	10	11	12	13	14	15	16	17	18	19	20
amazon	NHS	Google	NETFLIX	Cadbury	Apple	HEINZ	SAMSUNG	Microsoft	Boots	WALKERS	M&S	LEGO	TESCO	ALDI	ebay	Sainsbury's	Kellogg's	BBC	Coca-Cola
21	22	23	24	25	26	27	28	29	30	31	32	33	34	35	36	37	38	39	40
LIDL	Disney	WhatsApp	SONY	Dove	dyson	IKEA	Morrisons	Argos	NIKE	JOHN LEWIS & PARTNERS	Lindt	B&Q	McDonald's	Mars	BOSCH	ASDA	NIVEA	Nestle	b&m
41	42	43	44	45	46	47	48	49	50	51	52	53	54	55	56	57	58	59	60
Currys PC World	NESCAFÉ	Iceland	GREGGS	Panasonic	sky	COSTA	adidas	Ford	hp	pepsi	Superdrug	OP	BMW	National Trust	BT	Mercedes-Benz	WAITROSE & PARTNERS	Waterstones	PRIMARK
61	62	63	64	65	66	67	68	69	70	71	72	73	74	75	76	77	78	79	80
JAGUAR	TESLA	Clarks	VW	KFC	Nintendo	Audi	DELL	Spotify	LG	Canon	next	THE BODY SHOP	Virgin	BRITISH AIRWAYS	Levi's	deliveroo	Etsy	George.	HOTEL Chocolat.
81	82	83	84	85	86	87	88	89	90	91	92	93	94	95	96	97	98	99	100
SKECHERS	Twitter	PHILIPS	fitbit	H&M	acer	CHANEL	Reebok	Tkmaxx	XBOX	LUSH	PUMA	MATALAN	ASOS	Lenovo	vodafone	Dior	HSBC	GUCCI	NEW LOOK





Brand connection in the time of coronavirus

Brand connection in the time of coronavirus

Wez Eathorne, Research Director, Opinium




The pandemic has touched every facet of our lives, forcing us to adapt how we shop, socialise, communicate, and work. As you would expect, this has had a fundamental impact on our Most Connected Brands Index colouring and shaping the fortunes of entire sectors.



Changing how we work and where we work

Arguably, the most influential change the pandemic has brought has been to our working lives. As our freedoms have been stripped away by the pandemic, it is somewhat ironic that we have never had greater freedom to determine our working patterns and routines.






The requirement for non-essential workers to forgo their daily commutes and embrace virtual working has meant that the tools required to support this have therefore never been as important nor as high profile. This has led to a marked increase in the rankings for technology providers.

	2020	2021	Difference
 Microsoft	19 th	9 th	+10 ↑
	71 st	50 th	+21 ↑
	87 th	68 th	+19 ↑



A health and wellness bug alongside a nation comfort eating

A second trend has been the explosion in health and wellbeing as people found themselves anchored to their local areas with physical exercise one of the few pastimes available to them. This has led to brands like Nike and Fitbit surging up the rankings. Ironically confectionery brands have also benefited from the pandemic with a nation eager for a slice of happiness and distraction that can be bought over the counter

	2020	2021	Difference
	37 th	30 th	+7 ↑
 fitbit	—	84 th	NEW —
	43 rd	32 nd	+11 ↑
	46 th	39 th	+7 ↑
	74 th	65 th	+9 ↑

A nation desperate for entertainment, escapism, and distraction

Unsurprisingly, the pandemic and associated lockdowns have seen the entertainment sector thrive. Whilst it's easy to think that people have been living on a diet of Netflix boxsets it isn't just streaming companies who have benefited.

Brands such as Waterstones and the National Trust have powered up the rankings as consumers seek to escape the confines of their living spaces and look for screen-free sources of entertainment.


	2020	2021	Difference
NETFLIX	4 th	4 th	- =
LEGO	21 st	13 th	+8 ↑
Disney	33 rd	22 nd	+11 ↑
Nintendo	91 st	66 th	+25 ↑
National Trust	-	55 th	NEW -
Waterstones	70 th	59 th	+11 ↑



Signalling the death of the high street or just 'non-essential' shops?

For retail, the term non-essential has become the difference between a thriving business and unemployment and store closures. Brands that were less affected by restrictions such as M&S and Boots have proven far more resilient than those



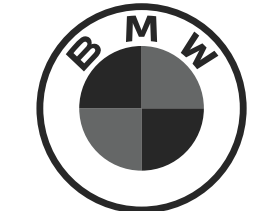



deemed non-essential, with retailers like Primark and New Look facing an existential crisis as the pandemic has accelerated the adoption of online shopping.

	2020	2021	Difference
PRIMARK	44 th	60 th	-16 ↓
NEW LOOK	89 th	100 th	-11 ↓
M&S	23 rd	12 th	+11 ↑
	16 th	10 th	+6 ↑

Forcing people off public transport, with a greater environmental awareness

One positive consequence of the first lockdown in March was the environmental impact. With daily commutes abandoned and travel restricted, air quality dramatically improved. Optimism that this would have a lasting effect on our relationship with the planet, though, was quickly checked when the first lockdown finished.

The public’s concerns over the safety of public transport coupled with the desire to escape their local areas meant car manufacturers surge up this year’s rankings. Sustainability has not been banished from consumers consciousness, however, with brands such as Tesla entering the MCB Top 100 for the first time.

	2020	2021	Difference
	75 th	61 st	+14 ↑
	62 nd	49 th	+13 ↑
	67 th	54 th	+13 ↑
 Mercedes-Benz	83 rd	57 th	+26 ↑
 TESLA	—	62 nd	NEW —
	73 rd	64 th	+9 ↑



Top scores by key measures



Prominence

The brand's presence and scale

Prominence in a pandemic: decided on the doorstep

Grace Tulip, Senior Research Manager, Opinium

Over the last three years we have seen two brands dominate when it comes to prominence, Amazon and Google. Given the omnipresence of these brands in day-to-day life, it is unsurprising they have held onto the gold and silver spots for another year. However, in a year that has redefined so many aspects of our lives the bronze has been taken by a previously unmentioned competitor, the NHS. Not traditionally considered a brand, the NHS has nevertheless been a guiding light for the nation through this pandemic and has been at the forefront of nationwide campaigns.

For ten weeks in the original lockdown, the nation took to their doorsteps every Thursday to applaud the key workers saving lives and keeping the country going. As well as grass roots initiatives, the NHS was a key theme of the government messaging for the spring of 2020, where we as a nation were urged to "Protect the NHS". In all the Government has

been reported to have spent more than £184 million¹ on Covid communications and advertising in 2020 alone. The emotional importance of the NHS to the nation can be clearly seen if we look at the emotions that people relate to the brand, with it achieving the highest score for belonging, hope and pride.

The NHS wasn't the only brand who saw their prominence spike in this year. Netflix has also made its way into the Top 10, increasing its position six places from 2020 and a whopping 48 places since 2019. While "Netflix and chill" might have become an illegal activity for those not in the same household in the past 12 months, alternative entertainment options have dwindled and by the summer of 2020 Netflix had 26 million² new subscribers. It is among the younger generation (18-29) year olds where Netflix is most prominent and ranks second out of all brands, only just following Apple.

Top 10 Prominence

	INDEX		INDEX
1. AMAZON	149		
2. GOOGLE	140		
3. NHS	135	6. NETFLIX	129
4. CADBURY'S	134	7. TESCO	128
5. BBC	130	8. APPLE	128
		9. BOOTS	127
		10. HEINZ	126



Distinction

The brand's unique identity and ability to set trends

The unsung heroes: from packers to practitioners

Hannah Reed, Junior Researcher, Opinium

Distinction can be defined as ‘a difference or contrast between similar things or people’, and the past year has been one that has both divided and united us in diverse and often opposed ways. Although the pandemic may have separated us physically and emotionally, the sense of solidarity that swept through the nation brought a moment of comfort and motivation during what was a difficult time for everyone.

As the highstreets became barren lands, and towns found themselves in a new sense of silence, one brand distinctly stood out from the rest among consumers. Fuelling the country with the newfound essentials of desks, dumbbells, and dozens of loo rolls, Amazon lead the way with 132 points on the Distinction ranking. This figure rose to 139 for those aged 50+, as Amazon became a lifeline for older consumers who needed to shield.

Following closely behind with 131 points was the NHS, an undervalued brand that brought entire communities together each Thursday in applause, making everyone appreciate the dedication of those working on the frontline. The distinct rainbow symbol became an emblem of the NHS, encompassing its core values of respect, compassion, and togetherness.

As normal life came to a standstill, entertainment brands came to the forefront for the younger generations (18-29 year olds). Disney (121), Netflix (119), and Spotify (117) all ranked highly on the index, as people binge watched through Tiger King, Sex Education, and The Crown. Launched just in time for the first lockdown¹, Disney+ brought a new excitement into the competitive streaming service landscape, contending against Netflix’s \$1bn UK budget². ▶

Top 10 Distinction

		INDEX			INDEX
1.	AMAZON	132			
2.	NHS	131			
3.	APPLE	125	6.	TESLA	118
4.	GOOGLE	123	7.	NETFLIX	117
5.	LEGO	123	8.	DYSON	117
			9.	MICROSOFT	115
			10.	CADBURY'S	114

¹ Launched March 24th 2020 in the UK
² <https://www.theguardian.com/media/2020/nov/25/netflix-to-spend-1bn-in-uk-in-2020-on-tv-shows-and-films>



For those aged 30-49 years old, tech brands were also among those favoured as most distinct. Apple (121), Google (121), and WhatsApp (112) all ranked within the Top 10, as video calls replaced in person meet-ups and digital connections became more important than ever. Lego (118) and Nintendo (114) also scored highly, demonstrating either the regression of adults' behaviour into their more youthful selves, or the desperate need for entertainment for parents struggling with home-schooling and young children.

The NHS stood out the most for consumers aged over 50, scoring 148 points for Distinction (+17 points compared to the overall). Coming in with 124 points was Dyson, which stands out in the market for putting an innovative touch onto every product it makes, from industry-best vacuums to award-winning hairdryers. Cadbury's (122) was also highly favoured, as sweet treats became the new luxury food purchases.

Overall, the most distinct brands were ones we tend to use on a day-to-day basis, and in normal times, possibly take for granted. During times of uncertainty however, they played a pivotal role in keeping us all healthy, happy, and above all, human.



Emotion

The brand's ability to form emotional relationships

Show me the brand love

Steve Looney, Research Director, Opinium

For most brands, forging an emotional connection is always going to be fundamentally important. Whilst some categories make it easier to create positive, long-lasting emotional relationships, emotional connection can be built in many diverse and varied ways.

Many of the top performing brands for emotion are strong performers overall, however, it is clear how the strength of consumers' emotional connection to these brands contributes to their positioning.

Top 10 Emotion

	INDEX		INDEX
1. NHS	131	6. GOOGLE	120
2. CADBURY'S	125	7. WALKERS	119
3. AMAZON	123	8. M&S	117
4. HEINZ	122	9. SAINSBURY'S	117
5. BOOTS	121	10. SAMSUNG	115



1

They're the ones that look after me

It's been heart-warming to see how the NHS has parachuted into MCB's Top 100. This year consumers, now more than ever are looking for brands which offer safety and security. And after all, what other brand has offered consumers this to the same extent over the last 12 months?

Boots, as a pharmacy, has also performed well due to the brand's close association with security, but it is Heinz which capitalises on this feeling of reassurance. Coming in with the second highest association to comfort, consumers are turning to well-known and familiar brands at times of crisis.

2

Emotion is what we do

Traditionally, FMCG brands and retail brands tend to forge strong emotional connections with consumers and the chocolate category is a classic example of this in action. Brands such as Lindt, Hotel Chocolat and Mars rank significantly higher on emotional connection than they do overall. Whilst we can all live without chocolate; it is what it does to us emotionally that makes us such fans. Cadbury is rated as the top brand that makes us smile by some distance, with Lindt, Hotel Chocolat and Mars all rated in the top ten on this attribute. It's clear to see how intrinsically linked to emotion this category is with many of the chocolate brands being the top-associated brands with emotions such as happiness and love.



3 I know you so well

National treasure is possibly an overused phrase but potentially appropriate for our next group of emotional connectors. These are the heritage brands that have been with us all our lives such as Walkers, Clarks, and M&S. These brands again outperform on emotion compared to other metrics in the MCB Index. Although these brands may be less relevant to consumers depending upon their life stage, they are staples of many households across the UK and brands that we all know and love.

M&S

Clarks



4 You can rely on me

The final theme of the over indexing emotional brands is a much-needed shot in the arm for the battered high street and retail sector. This varied group ranges from supermarkets such as Sainsbury's to the bookseller Waterstones; DIY retailer B&Q and high street staples such as Next and B&M. What is interesting about this group, however, is that whilst they build emotional connections with consumers in highly different ways, consumers go to these brands because they know what they want, and the brand delivers against these needs. B&M, for example, is a brand many can't live without but also performs well on making consumers smile. Similar to Sainsbury's and Waterstones, B&M is also seen to perform strongly on knowing what's important to consumers whereas B&Q and Next provide DIY enthusiasts and shoppers with inspiration.

Sainsbury's

W
Waterstones

next

b&m





Dynamism

The brand's momentum and social traction

Creating a buzz; to infinity and beyond, via the cheese aisle

Joe Curran, Senior Researcher, Opinium

What makes a brand or organisation dynamic?

Arguably it's all about adapting quickly to new problems and responding to the rapidly changing wants and needs of the public. It's also about generating 'buzz' by doing something innovative or unexpected.

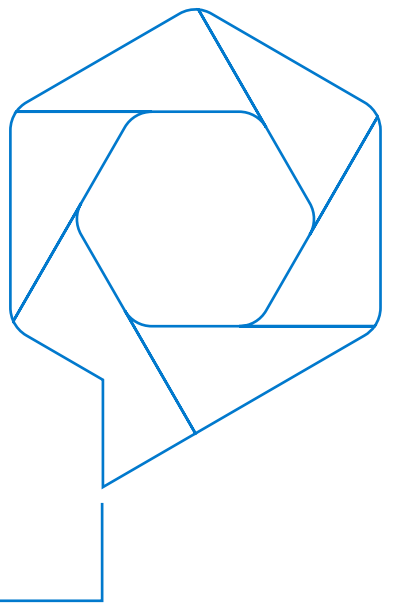
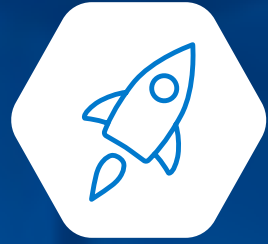
It is no surprise then that the brand, or rather the public institution, that ranks highest on our Dynamism measure is the NHS. In the face of a once-in-lifetime global pandemic, the NHS rose to the challenge, doing all in its power to save lives. Nurses and doctors as well as an army of auxiliary workers, already used to long hours and demanding work, went the extra mile. Despite facing myriad issues: a new and unknown virus, overstretched ICUs, and a lack of adequate PPE, the NHS stood up to deliver for the British public. What could be more dynamic?

Other brands that ranked well on our Dynamism score also showed that they could respond to a unique situation with little disruption to the public. Amazon, in second place, with its fleet of hard-working drivers and factory staff, kept the deliveries coming whilst the nation locked down. Netflix, third in the list, got us through the moments of boredom and its Party feature allowed us to watch together, even when we were apart.

However, not all scores are related to the pandemic. Tesla, for example scores well on our 'Buzz' measure which feeds into Dynamism. This is even more interesting given that it is a brand very few of us buy from. Instead, Tesla is a brand with a large media profile. Tesla's reputation for innovation and the cutting-edge, combined with its often-controversial CEO with dreams of commercial space travel, make it the subject of many conversations. ▶

Top 10 Dynamism

		INDEX			INDEX
1.	NHS	144			
2.	AMAZON	140			
3.	NETFLIX	135	6.	ALDI	122
4.	GOOGLE	124	7.	CADBURY'S	115
5.	APPLE	122	8.	SAMSUNG	115
			9.	WHATSAPP	115
			10.	LIDL	114



Away from utopian visions of driverless cars and space travel are brands with a more quotidian purpose. Aldi and Lidl both scored well on the Dynamism measure and it's no surprise. Nothing starts conversations quite like "you'll never believe how much this cost me!". But their products are not just kind to the bank account, also regularly winning awards even when up against well-established brands, as anyone who opted for Aldi's cheese this Christmas will attest.

When we look at differences between the generations, we see that the scores for Dynamism are much the same; the NHS, Amazon and Netflix all ranking in the top spaces. However, among those aged 18-29, Spotify scores much higher than among older generations. Whilst it's to be expected that young people are more likely to use the app, Spotify's marketing strategy is also a fantastic generator of 'buzz'. Its annual end-of-year 'Wrapped' feature dominates the group chats of young people every December as they discuss which artists and albums they listened to the most.

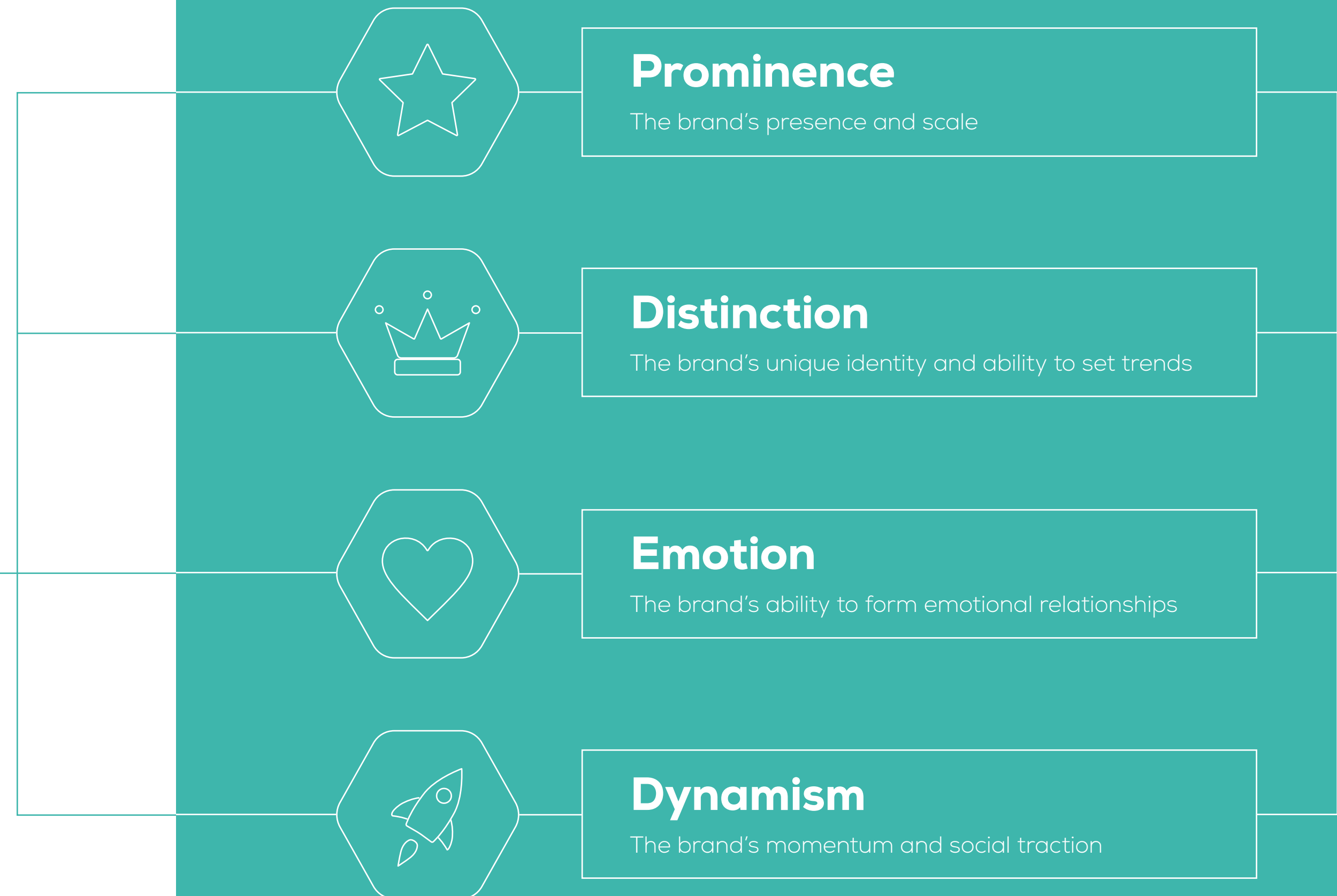




Methodology

How we ranked the Top 100 brands

We conducted a nationally representative study amongst 6,000 consumers. Based on our experience of evaluating brands via our **Connected Brands Framework**, we know what makes a brand matter to consumers, so we based the Most Connected Brands Index score on the following four key measures:



How we statistically linked the measures to what matters

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

How we explained the why behind the brand ranking

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



Brand consideration and likely future usage

Satisfaction

Social responsibility

Value for money

Delivery on needs

Recommendation

Brand imagery

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

How we derived the Top 100 UK brands

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

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

1

The brands consumers think about

The nation's favourite brands

The first data stream was a nationally representative study of the nation's favourite brands – each consumer was invited to spontaneously type in their top 10 favourite brands. We collated 5,514 spontaneous brand mentions from our sample of 6,000 consumers and identified the top brands mentioned (125).

2

The brands consumers talk about

Social media velocity

We measured the social media traction for each of the Top 125 brands, identifying how many brand mentions they received on social media.

3

The brands consumers buy

Brand revenue

We collated publicly available revenue figures for each of the Top 125 brands.



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Understand how your advert is perceived by your target audience



Identify what impact it has on your brand equity

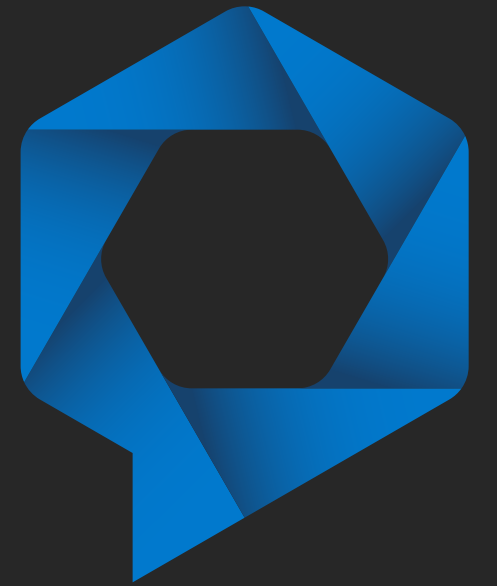


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What people think,
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