



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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Contents



5	Why Most Connected?
6	Foreword
7	2021 in the USA
10	Who we spoke to
11	What it means to be Most Connected
12	The Top 100 Most Connected Brands US
13	Brand connection in the time of coronavirus
21	Top scores by key measures
30	Methodology
34	Let's chat



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

In its third year, our US Most Connected Brands Index has given us a unique and precious lens into how Americans have adapted to this next stage of the pandemic, shifting away from crisis mode, into new habits, and towards new preferred brands.

Our methodology was born from 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 three years and the idea of 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.

The index tracks the newfound connection Americans feel towards ubiquitous, everyday brands, with affordable retailers like Target, Kohl's, and Dollar Tree rising in the ranks, as well as pharmacies like Walgreens and CVS that have been on the front lines of meeting our everyday necessities.

As Americans sought to amuse themselves within new health constraints, entertainment platforms had an opportunity to shine. Netflix jumped to 5th, and Hulu and Disney also climbed the ranks. Gaming consoles PlayStation and Xbox saw huge jumps as well. And the desire to escape local areas led to a near universal uplift in scores across auto brands.

An honorable mention must also go to Microsoft, which rose to 3rd in the ranks, joining tech giants Google and Amazon on the podium. The brand played a key role in the transition to remote work, through Microsoft Teams, and the announcement that they would open their cloud gaming service to all eligible Xbox Game Pass subscribers.

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.



Giulia Prati

VP Research,
Opinium US

2021 in the USA:

A year of post-election chaos, billionaire rockets and trying to outrun a global pandemic

Ande Milinyte, Research Manager, Opinium

If you were reading this in 2020, and this was a letter from the future – 2021, to be exact – the year ahead would have likely seemed like the promised land to a lot of Americans. With a divisive election behind us, the promise of vaccines available to ordinary Americans ahead of us and Dr. Anthony Fauci predicting that the US could achieve herd immunity by mid-2021 provided enough people got the vaccine¹, 2021 seemed like the light at the end of the tunnel – a promise of life returning to normal.

Little did we know that we'd kick off the year with the news the country had surpassed 20 million cases of Covid-19², The Washington Post publishing an audio recording of President Trump asking Georgia lawmakers to change the state's election results in his favor³, and five people dying after insurrectionists stormed the Capitol on January 6⁴. And that's just in the first week of January.

But with President Joe Biden sworn in on January 20 and vaccines becoming available to ordinary Americans, things were set to start taking a turn. By mid-March, more than 100 million vaccines had been administered in the US, and President Biden signed his \$1.9 trillion American Rescue Plan Act for Covid-19 relief into law – and by May, the CDC had allowed vaccinated people to ditch masks and stop socially distancing. But with three quarters of the year over, things are back to being uncertain for the country. The Delta variant has brought in a fourth wave of Covid-19, with the start of September marking a total of 40 million cases and over 650,000 deaths since the start of the pandemic. With no state or territory having passed the 70 percent threshold of vaccinations⁵, the end of Covid is not yet in sight. ▶



¹ Higgins-Dunn, Noah (December 8, 2020). "Fauci says Covid could be under control in 'back half of 2021' if enough people are vaccinated". CNBC. [Link](#).

² Cohen, Li (January 1, 2021). "U.S. surpasses 20 million cases of coronavirus on first day of 2021". CBS News. [Link](#).

³ "Audio: Trump berates Ga. secretary of state, urges him to 'find' votes". The Washington Post. January 3, 2021. [Link](#).

⁴ Ellyatt, Holly; Mangan, Dan; Pramuk, Jacob; Breuninger, Kevin (January 7, 2021). "After inciting riot, Trump now promises peaceful transfer of power". CNBC. [Link](#).

⁵ Kessler, Ben (September 5, 2021). "U.S. hits 40 million Covid cases as delta variant spreads". NBC News. [Link](#).

Timeline

November 2020



Joe Biden is elected US President



Dr. Anthony Fauci predicts herd immunity by mid-2021

December 2020



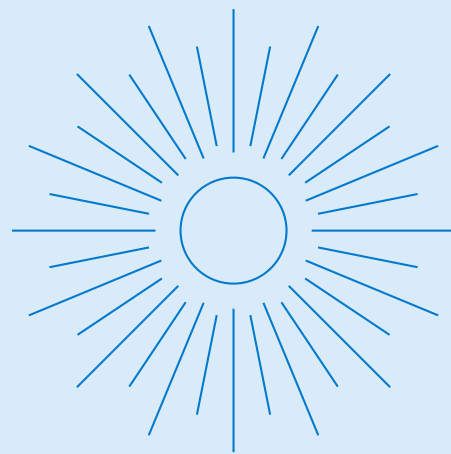
The US surpasses 20 million cases of Covid-19



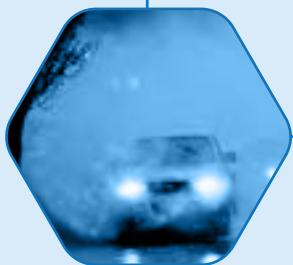
Trump asks Georgia to change election results in his favour



January 6th insurrection



September 2021



Hurricane Ida strikes



Total of 650K deaths and 40 million Covid-19 cases reached



Elon Musk's SpaceX launches Inspiration4 rocket into space



California sees its largest wildfire in history

August 2021



Jeff Bezos launches Blue Origin rocket into space

July 2021



June 2021



Apple staff write letter to CEO Tim Cook about remote working



CDC allows vaccinated people to not wear masks

May 2021



Derek Chauvin is convicted of murdering George Floyd

April 2021



Biden's American Rescue Plan Act signed into law



The US officially rejoins the Paris Agreement



President Biden signs a series of executive orders regarding climate change

February 2021



Jeff Bezos steps down as Amazon CEO



Over 100 million vaccines administered

March 2021





Following Kamala Harris becoming the first Asian American and first African American Vice President of the United States, and Derek Chauvin found guilty of murdering George Floyd, race continued to permeate the societal conversation. At the start of 2021, a nationally representative Opinion survey found that a staggering six in ten people of color had faced racial discrimination, but that only half (46%) of white Americans thought that racism in America was systemic, highlighting the “you’re either with us or against us” rhetoric splitting society down the middle.

Climate change continued to remind us of its devastating effects with a slew of deadly winter storms, wildfires and hurricanes throughout the year. In response, President Biden signed an array of executive orders rejoining the Paris Climate Agreement, buying an all-electric fleet of federal vehicles, and promising to double wind power by 2030, signaling a moment of change for the US in the interplay between climate and the economy.

It was a year of change for many brands and companies as well. Tesla CEO Elon Musk became the world’s richest person, while Jeff Bezos stepped down as Amazon CEO, with both businessmen successfully launching the SpaceX and Blue Origin rockets into space, respectively. Apple staff wrote an open letter to CEO Tim Cook requesting more remote working options after a large number of employees returned to the office, reflecting the conversations held in many businesses across the US about the future of hybrid working.

Suffice to say that 2021 is proving to be even more transformative for the way brands operate and communicate with consumers than 2020 was. From Covid-19 posing a continuous threat to businesses, to climate change affecting consumers’ purchasing behaviors, to ongoing changes to working practices, one thing is clear: this is a new territory, and a make-or-break moment for all.

Who we spoke to

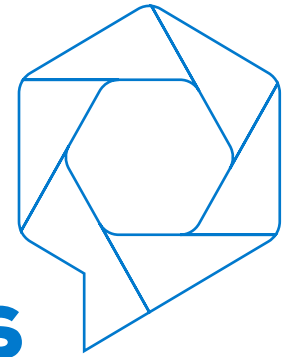
6,000 Consumers

9,458 Spontaneous
brand mentions

48,000 Brand
reviews

What it means to be Most Connected

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



The Most Connected Brands Index (MCB Index)

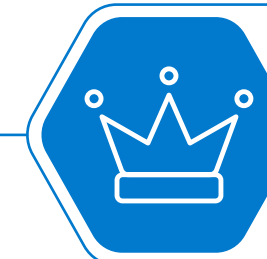
The MCB Index is the combination of four key brand metrics which are weighted together to produce a one-number summary of a brand's ability to connect with consumers.

We measure connection across four key characteristics:



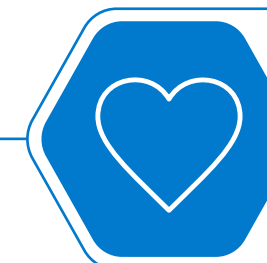
Prominence

The brand's presence and scale



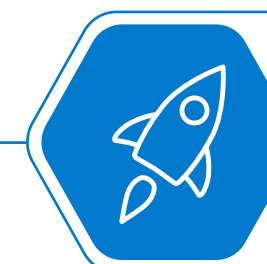
Distinction

The brand's unique identity and ability to set trends



Emotion

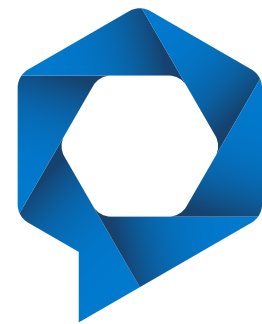
The brand's ability to form emotional relationships



Dynamism

The brand's momentum and social traction

The Top 100 Most Connected Brands US



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	Google	Microsoft	HERSHEY'S	NETFLIX	CLOROX	Lays	SAMSUNG	YouTube	Walmart	VISA	DAWN	Apple	Disney	Dove	Tide	Kraft	Target	Coca-Cola	McDonald's
21	22	23	24	25	26	27	28	29	30	31	32	33	34	35	36	37	38	39	40
Colgate	PayPal	Walgreens	Nike	HEINZ	THE HOME DEPOT	SONY	Red Bull	hulu	Levi's	TOYOTA	NABISCO	hp	LOWE'S	Ford	pepsi	adidas	STARBUCKS COFFEE	DUNKIN'	facebook
41	42	43	44	45	46	47	48	49	50	51	52	53	54	55	56	57	58	59	60
General Mills	DOLLAR TREE	CVS pharmacy	KFC	TACO BELL	CHEVROLET	LG	BURGER KING	Dr Pepper	PlayStation	HONDA	BEST BUY	Wendy's	Pizza Hut	P&G	verizon	Under Armour	DELL	Bath & Body Works	Nintendo
61	62	63	64	65	66	67	68	69	70	71	72	73	74	75	76	77	78	79	80
OLD NAVY	KOHL'S	Hanes	Great Value	Jeep	Mercedes-Benz	SKECHERS	ebay	COSTCO WHOLESALE	ALDI	Panera BREAD	AT&T	TESLA	OLAY	NISSAN	XBOX	THE NORTH FACE	CONVERSE	TRADER JOE'S	SUBARU
81	82	83	84	85	86	87	88	89	90	91	92	93	94	95	96	97	98	99	100
Hilton	macy's	LEXUS	NEW BALANCE	Air Jordan	BMW	VANS	WHOLE FOODS MARKET	VICTORIA'S SECRET	Kroger	Columbia	Capital One	Etsy	CHASE	Calvin Klein	Twitter	Southwest	AMERICAN EXPRESS	PUMA	Audi





Brand connection in the time of coronavirus

Brand connection in the time of coronavirus

Tom McEnergy, Research Director, Opinium

A hint of life beyond the pandemic?

The pandemic continues to loom large across a lot of the key movers and shakers in this year's list. This is to be expected; Covid-19 has touched every facet of our lives, forcing us to adapt how we shop, socialise, communicate, and work.

But there are also hints of how life is starting to look after the pandemic in this year's data too. The vaccine roll out, for example, has had a clear impact on some of the rankings in the 2021 list. Glimpses of the 'new normal' when it comes to entertainment, travel and work are also apparent from the list.








Let's hear it for the extraordinary everyday brands that got us through

Every one of us has been impacted by the turmoil of the last couple of years. Many of us have reassessed our priorities and needs. Perhaps that's also left us all a bit more grateful for the everyday brands, services, and of course workers that have supported us and got us through.

It's a wonderfully eclectic mix of climbers this year – including grocery stores that kept the shelves stocked, tech brands that

allowed us to continue working, and home improvement stores that gave us something to do while we couldn't leave the house.

Are these glamorous brands? Maybe not, but it seems that the pandemic may have made some of us a little bit more pragmatic in terms of which brands we feel connected to. We're certainly seeing a new-found appreciation for many of the ubiquitous everyday brands around us.

	2020	2021	Difference
	40 th	18 th	+22 ↑
	59 th	42 nd	+17 ↑
	83 rd	62 nd	+21 –
	19 th	3 rd	+16 ↑
	32 nd	26 th	+6 ↑



Pharmacies at the forefront of the drive for ‘back to normal’

With the role out of vaccines across the US, pharmacies have been at the forefront of our lives in the last year in a way we could never have imagined previously. Perhaps more than any other big brands in our daily lives they’ve played a part in the drive to get ‘back to normal’.

And that seems to have impacted the relationship and connection that many of us have with them as brands. Walgreens enters the list for the first time this year at number 23, while CVS has climbed a massive 18 places since the 2020 list.

	2020	2021	Difference
Walgreens	—	23 rd	NEW —
CVS pharmacy	61 st	43 rd	+18 ↑

Streaming cements its place in our lives

The changing ways we engaged with content and entertainment through the pandemic is clear in this year's list. Netflix may have recently reported some slowing of subscriber numbers globally, but our data suggests it continues to be making headway in terms of having a meaningful connection with people's lives. It's jumped 13 places to the heady heights of number 5 in the overall list this year.

And it's not just Netflix, either. Hulu has seen one of the biggest increases we've seen from any brand year on year, climbing 39 places to number 29 in the list. Even the mighty Disney has shown an increase this year, as Disney+ cements the brand's place in people's everyday lives.

	2020	2021	Difference
NETFLIX	18 th	5 th	+13 ↑
Disney	22 nd	14 th	+8 ↑
hulu	68 th	29 th	+39 ↑





A digital divide?

While we should avoid making lazy assumptions based on broad generational cohorts, the truth is that different age cohorts do tend to have different brands that they feel most connected to.

One of the big differences continues to be engagement with tech and digital-oriented brands. In fact, for 18-29s six out of the top ten brands this year might be described as 'digital-first' brands, including the entire top five. For those over 60 it's a much more mixed bag, with three digital-first brands, just two of which are in the top five.

18-29s top 10

NETFLIX

1

Google

2

amazon

3

YouTube

4

Microsoft

5

Disney

6

TikTok

7

McDonald's

8

Nike

9

Target

10

Over 60s top 10

amazon

HERSHEY'S

Google

DAWN

Kraft

CLOROX

VISA

Microsoft







Lay's

WABISCO

The car's the star

The global pandemic led to a rise in demand for personal transportation as public transport was either avoided or inaccessible at times for many. This concern over the safety of public transport, coupled with the desire to escape local areas, mean that we've seen a near universal uplift in scores across auto brands in the top 100 this year.

What's more, despite a notorious aversion to 'traditional' advertising and marketing, Tesla has also entered the list for the first time this year. With the shift to EVs now really dialling up in earnest, it will be interesting to see which of the legacy auto manufacturers stay ahead of the pack (and Tesla) in the coming years.

	2020	2021	Difference
 TOYOTA	51 st	31 st	+20 ↑
 Ford	42 nd	35 th	+7 ↑
 CHEVROLET	63 rd	46 th	+17 ↑
 HONDA	66 th	51 st	+15 ↑
Jeep	84 th	65 th	+19 ↑
TESLA	—	73 rd	NEW —
 NISSAN	90 th	75 th	+15 ↑
 LEXUS	109 th	83 rd	+26 ↑





Top scores by key measures

All eyes on Netflix

Grace Miller, Research Associate, Opinium

We witness Netflix soar to the top, becoming the fifth most prominent brand in the minds of American consumers. This is a significant rise from 2020, where the streaming service ranked 25th in terms of Prominence. Although we hoped 2021 held the promise of getting out of our home and socializing, Netflix jumped in with hit series, like 'The Queen's Gambit' and 'Bridgerton', that kept us in. 'Bridgerton', a drama set in the 19th Century that follows English aristocrats in pursuit of love and courtship, became Netflix's most-watched TV series ever¹.

While Netflix rose in ranks, the US Postal Service (USPS) and Clorox left the top ten this year. Both of these brands played crucial roles as we adapted to life amid a pandemic in 2020: the USPS delivered packages to our doors when we were in lock-down; Clorox helped ramp up efforts to keep our homes and public facilities clean to stave off the coronavirus. However, in 2021, we were given the promise of vaccines and

a pathway out of this – their drop in Prominence is a reflection of the changed behaviors and attitudes we have taken on (while still living in a pandemic).

Clorox and USPS' drop from the top ten made room for big tech competitors: Apple (8) and Microsoft (9). Both companies have experienced a surge in revenues this past year². Hybridity between the virtual and physical worlds is now the standard for everything from businesses to social interaction. Apple and Microsoft have offered the technology to bridge that gap and connect colleagues, friends and loved ones over the past year (no matter where they may be).

Amazon, Google, Walmart, McDonald's, and Coca-Cola remained among the top ten most prominent brands, a nod to their ubiquity and perseverance. Amid constant change and uncertainty, these brands continue to hold their own and remain top of mind among consumers.

Top 10 Prominence

2021		2020
AMAZON	1	GOOGLE
GOOGLE	2	AMAZON
WALMART	3	WALMART
MCDONALD'S	4	MCDONALD'S
NETFLIX	5	COCA-COLA
COCA-COLA	6	HERSHEY'S
VISA	7	YOUTUBE
APPLE	8	US POSTAL
MICROSOFT	9	CLOROX
NIKE	10	SAMSUNG



Distinction

The brand's unique identity and ability to set trends

Home is where the entertainment is

Grace Tulip, Senior Research Manager, Opinium

Retail and tech giants maintain poll position while homes remain the center of business and entertainment in a post-pandemic America

Amazon and Google have held on to the first and second place, respectively, in the Distinction category for the past three years, unsurprisingly so given their unparalleled offering not only in the US but globally. In the past 12 months, while the pandemic has had disastrous effects for many businesses and personal fortunes, this has been a time of colossal growth for Amazon, with a reported 29.9%¹ increase in North American sales in the first 6 months of the year. The convenience of home delivery remains an important draw for consumers while Google remains the omnipresent fountain of knowledge in our lives.

This year also saw an impressive rise for another tech giant, Microsoft, moving from 17th to 3rd position. This may be partly down to the continued use of their Teams software by companies across the country as working in an online world seems to be here to stay. As of the first quarter of this year, there are an estimated 145 million users worldwide compared to 20 million in 2019. This year also saw Microsoft announce their cloud gaming service, xCloud, would become part of Xbox Game Pass Ultimate, allowing gamers to stream games to their computers, Macs, and smartphones as well as their Xbox, bringing the tech monolith to all outlets a gamer could ask for. ▶

Top 10 Distinction

2021		2020
AMAZON	1	AMAZON
GOOGLE	2	GOOGLE
MICROSOFT	3	USPS
DAWN	4	LYSOL
HERSHEY'S	5	REESE'S
YOUTUBE	6	HERSHEY'S
NETFLIX	7	M&M'S
APPLE	8	YOUTUBE
CLOROX	9	APPLE
DISNEY	10	CLOROX

¹ 'Amazon's profits keep rolling in even as sales growth slows in Q2'. [Link.](#)



While the outside world may still feel uncertain, film and TV streaming services have remained a constant companion in our daily lives throughout the pandemic. This year YouTube rose from 8th to 6th position and Netflix from 14th to 7th. While Netflix's offering still appears to be unmatched, potential cracks have begun to appear as more competitors are entering the market and from well established brands like Disney, Apple and WarnerMedia. The question is, in an ever more saturated marketplace will Netflix maintain distinction from the rest. In the second quarter of the year Netflix lost over 400 thousand subscribers across the US and Canada¹ and forecasts are not looking as positive as they were this time last year.

Entertainment is not the only area of the home helping brands stand out from the crowd; for a second year in a row household cleaning products are maintaining prominence in the category. Dawn Soap has made its way from 15th to 4th position, while Clorox has held on to a top ten ranking at 9th place. While Coronavirus continues to be a presence in our daily lives and hygiene practices ever more important, we can expect to see cleaning products at the forefront of people's minds.



¹ 'Netflix bleeds subscribers in US and Canada with no sign of recovery', ft.com. [Link](#).



Emotion

The brand's ability to form emotional relationships

Comfort and connection bring brands the love

Harley McKee, Research Associate, Opinium

Brands that inspire true emotion create lifelong customers. The brands that filled our hearts and the top spots in the Most Connected Brands list this year embraced the pandemic as an opportunity to provide comfort, safety, cleanliness, and convenience to a country trapped at home.

Chocolate and chips comfort American hearts

Hershey's held its position as the most loved brand by consumers in 2021. In a year defined by uncertainty, Americans turned to Hershey's chocolates and Reese's cups for a certain comfort and a sense of normalcy.

Lay's leaped into the 4th position in 2021 – up five spots from last year. Lay's chips filled the pantries of millions of homes across the US – a familiar comfort to turn to or share with the kids. Kraft, the champion of easy-made comfort meals, landed as the 10th most loved brand of 2021 after falling a short three positions from the year before.



Prime delivery keeps Americans stocked and safe from indoors

Unsurprisingly, perhaps, the most connected brand overall – Amazon – also earned its place as the second most loved brand by American consumers. Shipping in days or less, Amazon brought essentials to millions of American households at a time where many felt unsafe leaving their homes. Amazon offered a feeling of security and joy with every package delivery made in 2021.

Amazon made most store visits unnecessary, and Whole Foods and Amazon Fresh kept kitchens full without needing to visit the grocery store. Prime Video content helped bring families together and individuals some comfort on even the most trying pandemic days.

Big tech facilitates information and connectivity through an uncertain time

For every uncertainty the pandemic created, Google tried its best to quell anxiety by providing the best information available. Google's simple and inviting search box allowed Americans to unload their most anxious questions and get the answers they needed to stay healthy, informed, and connected.

Few brands permeate more areas of our lives than Google with Google Search, Drive, and Maps. Google Search inspires trust, reliability, and a user-first experience. Drive allows us to collaborate and share important files with the people that matter to us. Maps took millions on road trips, or even just new adventures around the neighborhood. Google earned its 7-spot jump into the third most loved brand in 2021.

Tied for the largest jump into the top 10 is Microsoft, vaulting 21 spots to be the brand with the 7th strongest emotional tie to the American people. It's no wonder, with Microsoft Teams empowering thousands of Americans' businesses with an integrated suite of MS Office tools throughout the pandemic. Teams helped us stayed connected and productive and helped make work from home more tolerable – even pleasant.

Notable jumps into the top 20

Dove landed itself the position as 9th most loved brand after rising 21 spots since 2020. Dove delivered on comfort and cleanliness through the past year. The brand further helped capture hearts with its tasteful pandemic campaigns such as “Courage as Beautiful” and large donations made to relief foundations.

Netflix jumped an impressive 29 spots to occupy the 14th place amongst brands with strong emotional connections as it became a stay-at-home staple for millions of Americans.

Target advanced 30 places in the rankings to become the 16th most loved brand in America.

Top 10 Emotion

2021		2020
HERSHEY'S	1	HERSHEY'S
AMAZON	2	M&M'S
GOOGLE	3	LYSOL
LAY'S	4	REESE'S
CLOROX	5	AMAZON
DAWN	6	CLOROX
MICROSOFT	7	KRAFT
VISA	8	USPS
DOVE	9	LAY'S
KRAFT	10	GOOGLE



Dynamism

The brand's momentum and social traction

Necessity is still the mother of invention

Josh Glendinning, Associate Director, Opinium

When many consumers are stuck at home due to shutdown orders, we might assume that dynamism is the last thing they would be looking for. But necessity is the mother of invention and the actions of brands to adapt their offerings could well have a lasting impact on consumer perceptions.

Moreover, the trends and behaviors that have developed and established themselves over the past 18 months are likely to continue for the foreseeable future, so brands seen to be at the forefront of these will have established a very clear advantage over competitors.

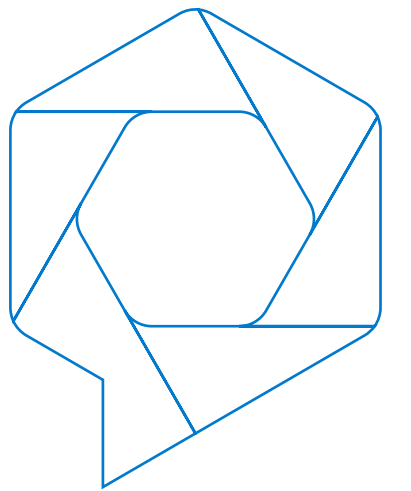
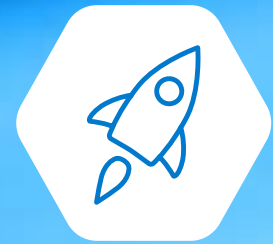
Many of the trends we can see in the overall Most Connected Brands Index are apparent when we focus in on Dynamism and the factors that make it up – whether a brand sets trends, or is particularly quick or innovative in adapting to a global crisis.

Microsoft has seen one of the strongest rises from 25th to 6th. For a long time, the firm was overshadowed by some of the newer and perhaps more fashionable tech companies, such as Google, Amazon, and Facebook, and there was a danger of it fading from consumer minds due to its shift towards more B2B technology.

However, the new products and services it has released over the past few years have not only been innovative, they have also had impeccable timing. For example, Microsoft Teams only launched in 2017 and was in exactly the right place at the right time to capitalize when many firms switched to full-time remote working in 2020. Meanwhile the firm has continued to improve its range of personal computers and laptops. ▶

Top 10 Dynamism

2021		2020
AMAZON	1	AMAZON
GOOGLE	2	LYSOL
NETFLIX	3	USPS
APPLE	4	YOUTUBE
CLOROX	5	GOOGLE
MICROSOFT	6	CLOROX
YOUTUBE	7	WALMART
LAYS	8	NETFLIX
SAMSUNG	9	APPLE
HERSHEY'S	10	UPS



However, it's not just tech that can be innovative. It's hard to think of a more traditional brand than Lay's or a more traditional product than potato chips but the firm has risen 14 places in our latest Dynamism rankings to sit 8th. This could undoubtedly be due to many consumers taking comfort in snacks during the pandemic, but the company has also done a great job of continuing to innovate to adapt to changing consumer tastes. Most recently, Lay's has announced a tie-up with other snack brands to create Doritos Cool Ranch and classic Funyuns flavors.

Other notable rises in our Dynamism score came from Target (up 13 places), Colgate (up 12), and Nike (up 20).

By contrast, Walmart has fallen six places in terms of Dynamism. The retailer has certainly expanded the range and quality of its online services. However, consumers have become increasingly used to near-instantaneous app-based delivery services, especially during the pandemic while Walmart is perhaps still considered a more traditional player.

There were also sizeable falls for Heinz (down seven), Lowe's (down five), and Facebook (down eight).

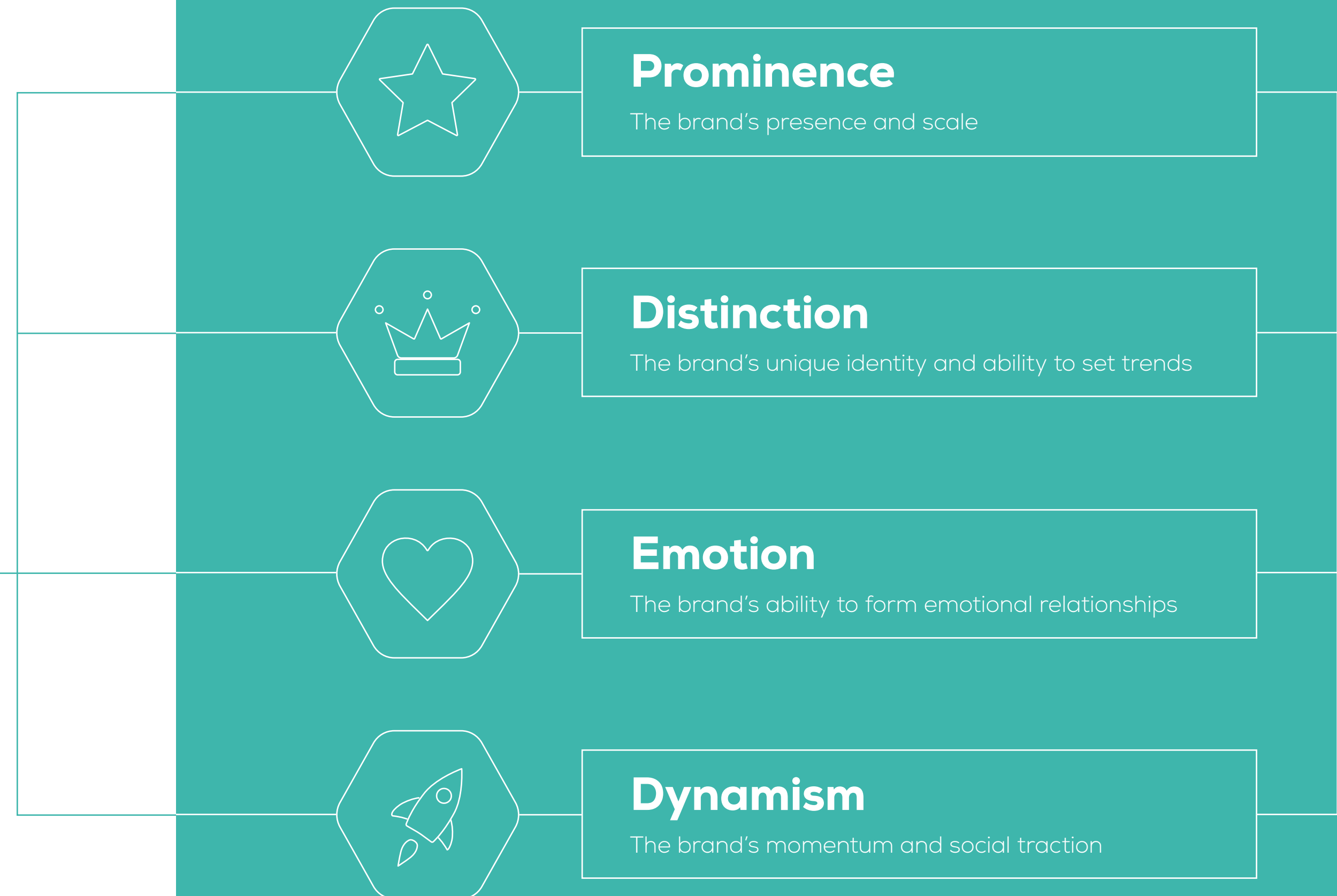




Methodology

How we ranked the Top 100 brands

We conducted a nationally representative study amongst 6,100 consumers. Based on our experience of evaluating brands via our Connected Brands Framework, we know what makes a brand matter to consumers, so we based the Most Connected Brands Index score on the following four key measures:



How we statistically linked the measures to what matters

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

How we explained the why behind the brand ranking

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



Brand consideration and likely future usage

Satisfaction

Social responsibility

Value for money

Delivery on needs

Recommendation

Brand imagery

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

How we derived the Top 100 US brands

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

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

1

The brands consumers think about

The nation's favorite brands

The first data stream was a nationally representative study of the nation's favorite brands – each consumer was invited to spontaneously type in their top 10 favorite brands. We collated 9,458 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

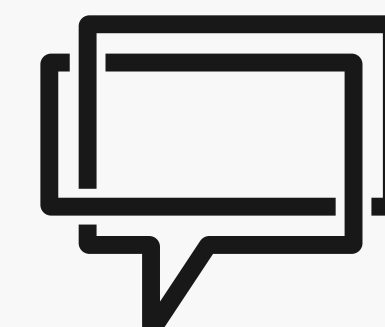
We measured the social media traction for each of the Top 125 brands, identifying how many brand mentions they received on social media.

3

The brands consumers buy

Brand revenue

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



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