



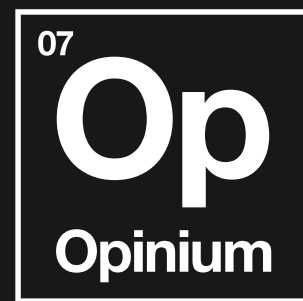
What people think,  
feel and do



# The Most Connected Brands 2022

**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 2022?

2022 has been a year of change and disruption. From the continuing ramifications of the Covid-19 pandemic and the growing cost-of-living crisis to a war in Europe and a new Sovereign in the UK.

For many the idea that brands can play a role in these turbulent times may seem strange, but brands have never had a more crucial role to play – offering guidance, hope, safety, and distraction. We would argue that there has never been a more relevant time to measure which brands the public connect with and the nature of this connection.

Most Connected Brands 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 five years and the idea of asking the people, and reflecting the human, lived experiences has never been more relevant. Whatever your political, economic

or social viewpoint, 2022 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 that this report will provide you with the inspiration, ideas and motivation to create, build and grow the connections that matter to you.



**Wez Eathorne**

Director,  
Opinium

## Who we spoke to

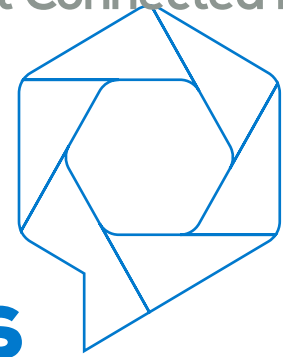
**6,000** Consumers

**5,462** 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)

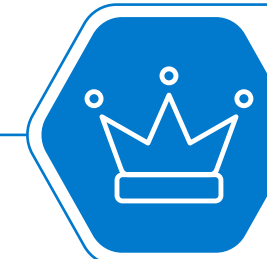
The MCB Index is the combination of four key brand metrics which are weighted together to produce a one-number summary of a brand's ability to connect with consumers.

We measure connection across four key characteristics:



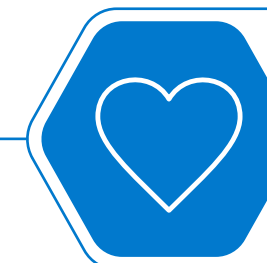
### Prominence

The brand's presence and scale



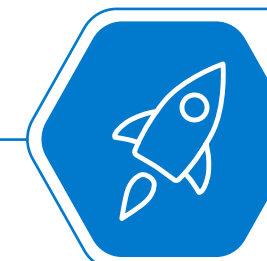
### Distinction

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 UK



The Most Connected Brands 2022

01	02	03	04	05	06	07	08	09	10	11	12	13	14	15	16	17	18	19	20
amazon	Google	NETFLIX	Cadbury	ALDI	HEINZ	WALKERS	SAMSUNG	TESCO	YouTube	FAIRY	Apple	WhatsApp	Microsoft	M&S	LEGO	ebay	Kellogg's	Argos	Boots
21	22	23	24	25	26	27	28	29	30	31	32	33	34	35	36	37	38	39	40
Coca-Cola	Sainsbury's	ASDA	BBC	LIDL	Colgate	Disney	Dove	SONY	IKEA	BirdsEye	GREGGS	NIVEA	Iceland	Nike	dyson	McDonald's	Morrisons	Superdrug	adidas
41	42	43	44	45	46	47	48	49	50	51	52	53	54	55	56	57	58	59	60
COSTA	Lindt	NESCAFÉ	facebook	sky	Nestle	BT	JOHN LEWIS & PARTNERS	pepsi	PRIMARK	Nationwide	BMW	BOSCH	Ford	Levi's	OP	hp	Audi	LG	Dunelm
61	62	63	64	65	66	67	68	69	70	71	72	73	74	75	76	77	78	79	80
Panasonic	next	YORKSHIRE TEA	LURPAK	Etsy	Clarks	KFC	George.	WAITROSE & PARTNERS	Mercedes-Benz	DELL	CONVERSE	Waterstones	TOYOTA	Virgin	Instagram	Santander	BRITISH AIRWAYS	MATALAN	Holland&Barrett
81	82	83	84	85	86	87	88	89	90	91	92	93	94	95	96	97	98	99	100
JAGUAR	Nintendo	Twitter	BOSE	THE NORTH FACE	TikTok	T-kmaxx	JUST EAT	CHANEL	BARCLAYS	NISSAN	H&M	Calvin Klein	TESLA	Dior	THE BODY SHOP	vodafone	HONDA	Reebok	LAND-ROVER





# 5 Years of Most Connected Brands

Jack Tadman, Associate Director, Opinium

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.

Yet when we began tracking in 2018 it's fair to say that none of us had thought that we'd be sitting on a dataset that spanned the changes we've seen over the last 5 years.

During this time, we've tested 158 different brands using our validated framework, which uses a combination of four key brand metrics to produce a one-number summary of a brand's ability to connect with consumers.

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.



## Introducing the most, Most Connected Brands

Out of the 158 brands we've tested, 62 have made our top 100 every, single, year.

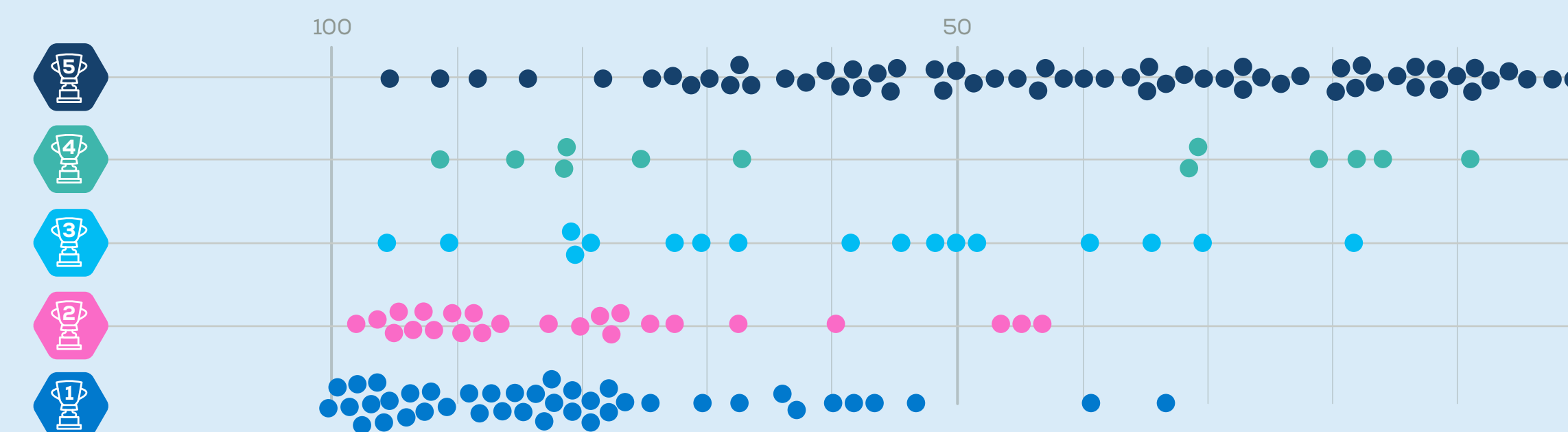
These represent a spectrum of brands across technology, entertainment, FMCG, retail, supermarkets, fashion, automotive, telecoms and shoes.

Yes, shoes...

Clarks, the mighty British leather and suade powerhouse founded in 1825, has consistently ranked within the top 75 brands over the last 5 years. What's perhaps more remarkable is that not a single financial services brand has placed every year since 2018. Shoes > Savings. ▶

No. of times appearing  
in our top 100

Average Ranking out of 100





- ▷ But outside of Clarks, there have been even greater success stories.

Netflix has risen from 30th in our inaugural ranking in 2018, to placing within the top 5 over the last three years and Aldi has gone from 21st to 5th during the same time period.

These brands, along with WhatsApp, Sky, Costa and BT are brands who have been steadily improving their performance over the last 5 years.

An interesting mix of technology, supermarket, broadcast/telecoms and erm, coffee house, right?

Well, the thing that links all of them is their ability to consistently drive three things: how quickly they come to mind, the ability to elicit a strong positive emotional response and meet consumer needs with their products and services. Simple stuff, but it works.



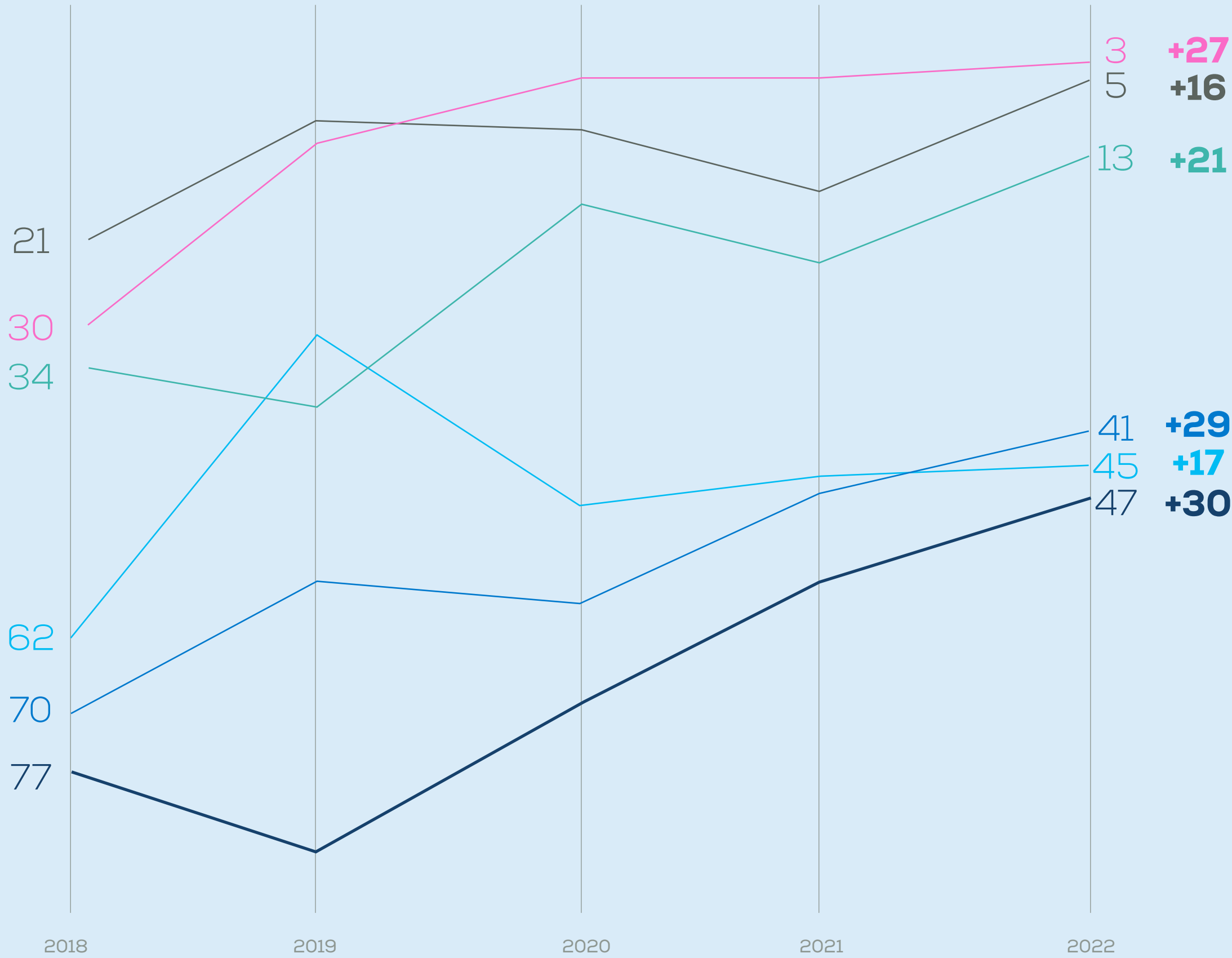
No. of times appearing in our top 100

Average Ranking out of 100

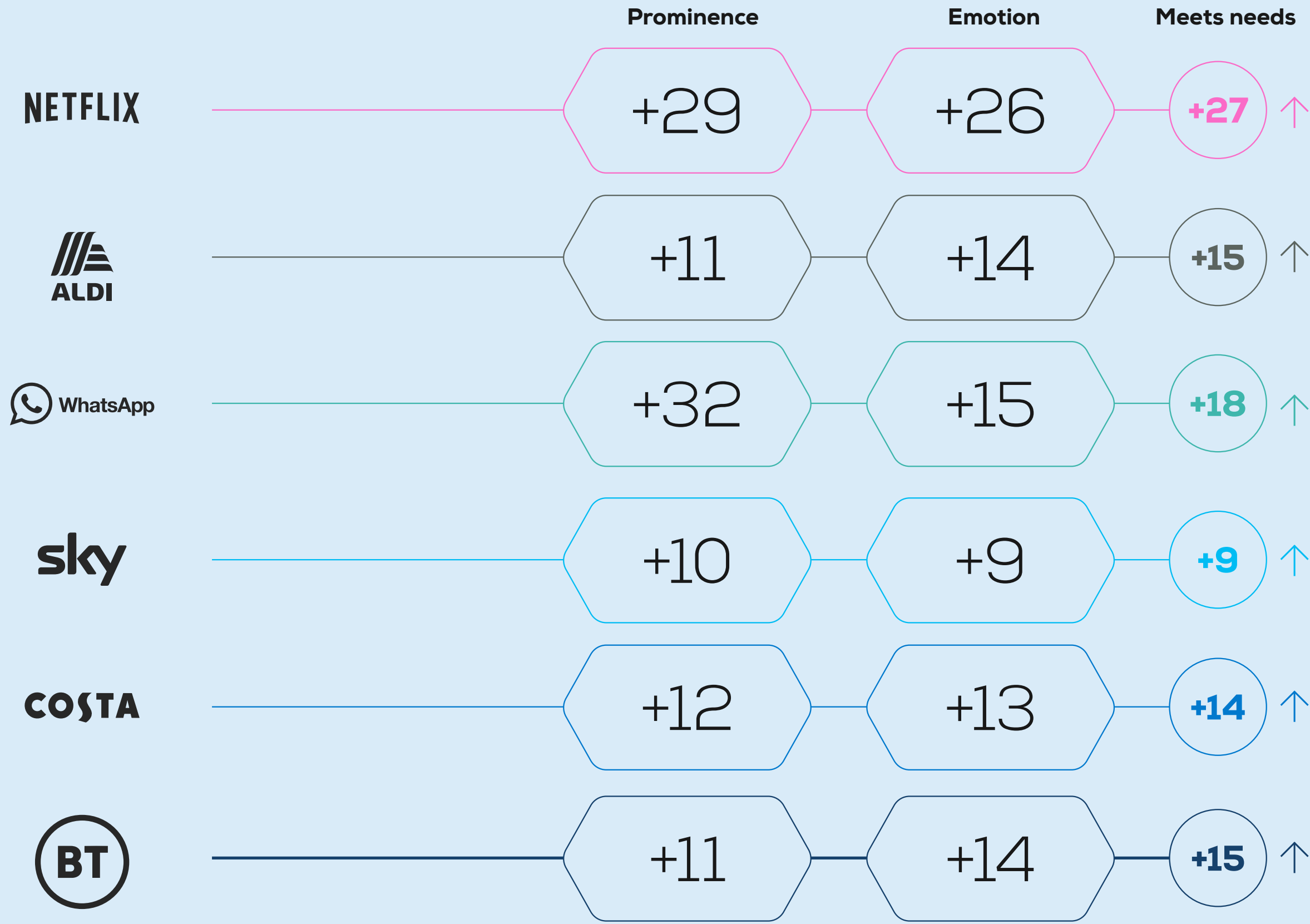




Ranking over time

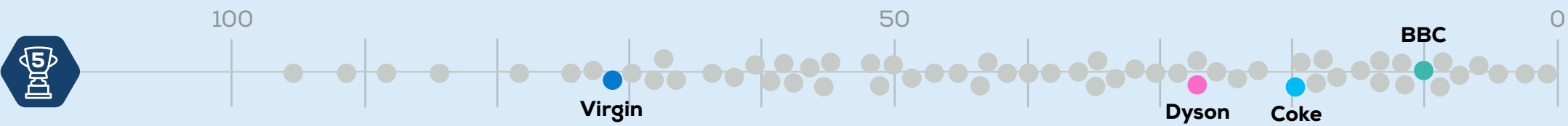


Differences 2022 vs. 2018

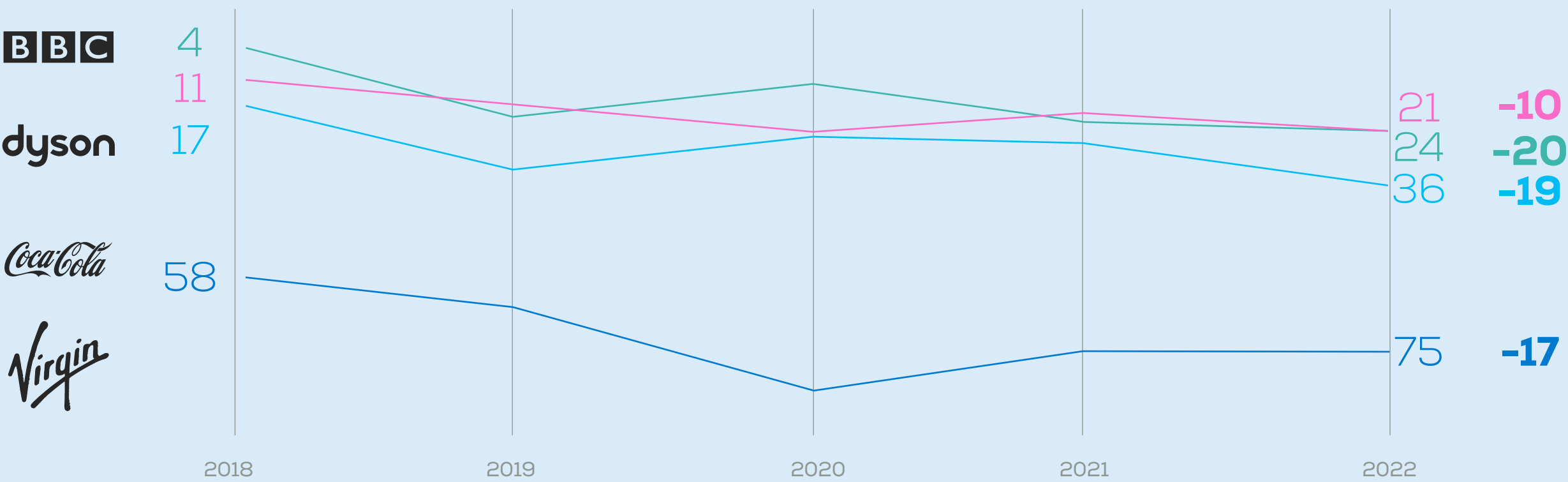


No. of times appearing  
in our top 100

Average Ranking out of 100



Ranking over time



Differences 2022 vs. 2018

However not all our power brands are on the way up, there are some which are potentially on their way to falling out, and the names might surprise you.

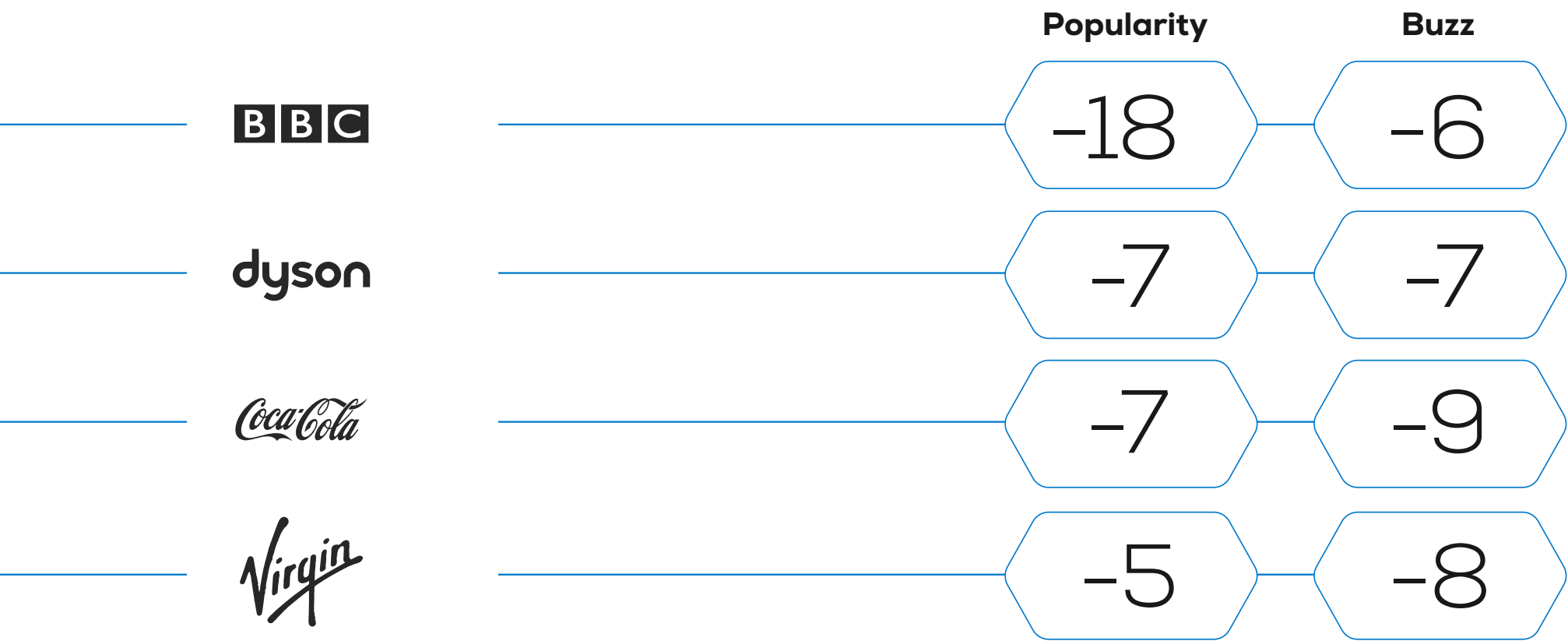
That's right, the beloved / bemoaned BBC, innovation blowhards Dyson and global giants Coke and Virgin have all been tumbling in consumer connection.

The reason for these declines?

In this case, it's not due to falling Prominence or Emotion, but instead in Dynamism, that is, a reduction in momentum and social traction in UK society.

We have long used this measure to identify whether a brand is on the up (or down), and now our data over 5 years is beginning to show why it is so important to measure not just how your brand is doing now, but also where it's going.

Brand popularity and buzz





Month on month  
decline in clothing  
brands sales

↓  
-10.7%

# Tighten your belts:

## how fashion brands can survive in a time of crisis

Ande Gilmartin, Senior Research Manager, Opinium

Brits, just like the rest of the world, are feeling the pinch of the cost of living crisis, as inflation, the war in Ukraine and rising energy costs continue to weigh down the nation.

Undoubtedly, we've seen the most hard-hitting effects of the crisis on the cost of essentials like food and fuel. Another sector that has seen a swift change has been the fashion industry, with clothing brands seeing a -1.9% year-on-year decline in sales, and a month-on-month drop of -10.7%<sup>1</sup>. With a quarter of Brits saying they intend on reducing their spend on new clothes and accessories<sup>1</sup>, the foreseeable future does not bode well for fashion retailers.

All of this is reflected by shifts in our Most Connected Brands indexes from 2021 to 2022. Fast fashion giants such as H&M, Asos and New Look have all seen their rankings fall, with most even dropping out of the Top 100. The luxury brand Gucci fell 9 places to just outside the Top 100. ▶

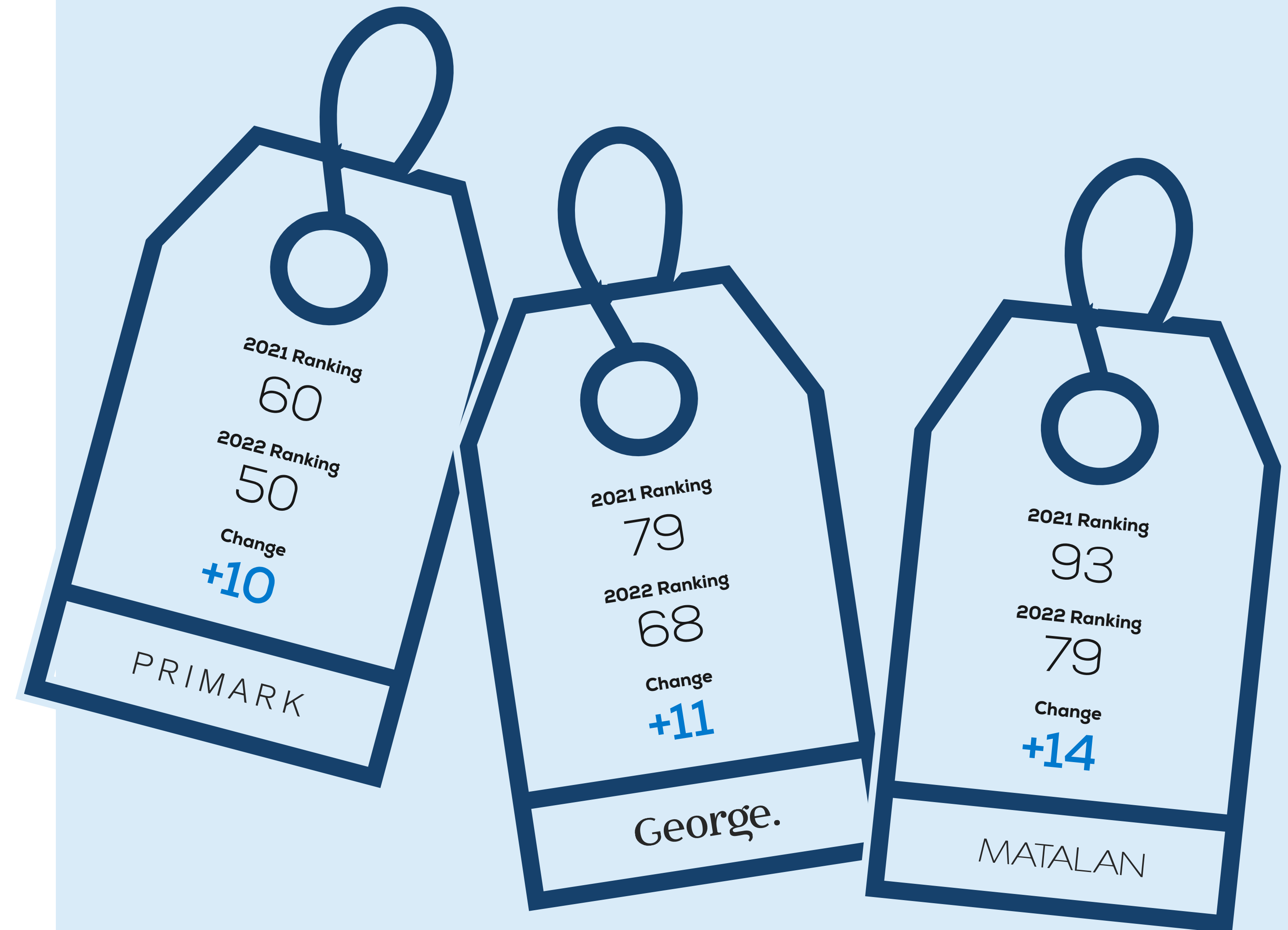
	2021 Ranking	2022 Ranking	Change
H&M	85	92	-7 ↓
ASOS	94	110	-16 ↓
GUCCI	99	108	-9 ↓
NEW LOOK	100	112	-12 ↓

- That being said – and perhaps unsurprisingly – budget fashion brands are seeing a resurgence.

The low-cost fashion retailer Primark has climbed 10 places in the Most Connected Brands index in the last year. The brand has had a busy year: it launched a new online shop<sup>2</sup>, having previously only operated in brick-and-mortar stores; collaborated with the high street bakery chain Greggs on an unlikely yet viral fashion collection<sup>3</sup>, and saw a 59% rise in sales in the first half of the financial year<sup>4</sup>.

Similarly, Asda's in-house clothing brand George also rose in the ranking by 10 places. The low-cost brand has invested in upping its game in the last year, with a change in leadership<sup>5</sup>, a collaboration with Netflix on a fashion and lifestyle range<sup>6</sup>, and using inclusive advertising, namely women with stretchmarks modelling their lingerie range<sup>7</sup>.

Furthermore, the fashion and homeware retailer Matalan has jumped up 14 places in the last year. The brand is currently undergoing a digital transformation, modernising their online store<sup>8</sup> and relaunching their customer rewards programme under the new name 'Matalan Me', which offers numerous savings<sup>9</sup>. The brand has even gone as far as to directly help its customers ease the financial burden of the crisis, launching a competition which would cover one lucky winner's energy bills for a year<sup>10</sup>. ►



<sup>3</sup> Javed, Saman (8 February 2022). "Absolutely barking mad": Fans react as Greggs teams up with Primark on limited edition collection". The Independent

<sup>4</sup> Sillars, James (26 April 2022). "Primark plots price hikes as sales rise 59% in first half of financial year". Sky News

<sup>5</sup> Fish, Isabella (5 January 2022). "Leadership changes announced at Asda". Drapers

<sup>6</sup> Hughes, Sarah (12 April 2022). "Asda's George partners with Netflix for fashion and lifestyle lines". Grocery Gazette

<sup>7</sup> Norden, Jasmine (10 Feb 2022). "Asda inundated with praise for using mum with stretchmarks as lingerie model". Leeds Live

<sup>8</sup> Rigby, Chloe (18 January 2022). "Matalan embarks on second phase of its digital transformation – and says stores remain important despite online growth". Internet Retailing

<sup>9</sup> Cameron, Isabel (7 April 2022). "Matalan relaunches loyalty scheme as 'Matalan Me'". Charged

<sup>10</sup> Howard, Linda (8 March 2022). "Matalan will pay your energy bills for one year – here's how to take part". Daily Record



Levi's

2021 Ranking

76

2022 Ranking

55

Change

+21

- One brand has seen a jump in its ranking despite not being the most wallet-friendly. The heritage denim brand Levi's has seen the highest increase in ranking of all the fashion brands in our index, going up a whopping 21 places. The brand's strategy this year has been not to promise low prices, but instead to focus on the durability and sustainability of their products.

The brand celebrated its blueprint jeans Original 501's 150th anniversary this year, releasing a reinterpretation of the model through a star-studded campaign featuring Marcus Rashford, Naomi Osaka, Hayley Bieber, Jaden Smith, Kid Cudi and others<sup>11</sup>. However, there is something different about this relaunch of the 501s: the jeans are entirely recycled. Every pair is made from a liquified pair of old Levi's as the company zeroes in on its strategy of sustainability<sup>12</sup>. What is more,

the brand has partnered with the British Council's Architecture Design and Fashion programme, which aims to use innovative design to address global challenges<sup>13</sup>. To top it all off, they have recently launched their latest campaign that seeks to give it to us straight with their slogan: "When they're made to last, we can all waste less. Buy Better. Wear Longer."<sup>14</sup>

What is clear is that the cost-of-living crisis is rapidly shifting what goes into people's shopping basket. With food and fuel being top priorities, clothes are taking a back seat. In order to survive – or, even better, avoid – the rapid drop in sales, brands will need to shift strategies: be like Levi's and convince shoppers of their longevity, or ease the financial burden as the likes of Primark, George and Matalan have done. Either way, a change is not just coming – it's already here.

<sup>11</sup> Santiago, Elliot (2 May 2022). "Levi's Taps Hailey Bieber, A\$AP Nast, Peggy Gou and More for Its New "501@: The Number That Changed Everything" Campaign". HypeBeast

<sup>12</sup> Ettinger, Jill (13 Jan 2022). "Levi's Launches Recycled 501 Jeans Made From Liquefied Old Jeans". Green Queen

<sup>13</sup> Warren, Liz (26 April 2022). "Levi's partners with British Council to showcase upcycling potential". Rivet

<sup>14</sup> Kemp, Audrey (21 September 2022). "Levi's prompts consumers to 'buy better' jeans for the planet". The Dr

# Aldi shows a smart way for brands to navigate difficult times

Tom McEnery, Director, Opinium

The late Queen Elizabeth II's favourite supermarket was Waitrose, apparently. They've been the royal family's store of choice since 1928. If the Queen has a favourite supermarket, it's safe to assume we all do too.

That's certainly clear from our Most Connected Brands Index, which ranks the UK brands that are most effective at engaging with consumers. We've seen big movements for the supermarkets this year.

The most dramatic mover is Aldi, which has risen by a full 10 places, up to fifth. That's fifth place. Ranked against every brand in the UK.

What's even more impressive about Aldi's performance is how consistently it's connecting with consumers across generations. It ranks 15th for 18-29 year olds, 5th for over 60s, and as high as 4th place for 30-49 year olds.



MCB 2022 ranking

18-29	15 <sup>th</sup>
30-49	4 <sup>th</sup>
50-59	11 <sup>th</sup>
60+	5 <sup>th</sup>

	2021	2022
AMAZON	1	1
GOOGLE	3	2
NETFLIX	4	3
CADBURY'S	5	4
ALDI	15	5
HEINZ	7	6
WALKERS	11	7
SAMSUNG	8	8
TESCO	14	9
YOUTUBE	NA	10



# The joy of Aldi

There's a quiet revolution happening in the UK grocery sector. This year Aldi overtook Morrisons to become fourth largest supermarket chain by share of sales, with 19%\* year on year growth. Lidl is hot on its heels, with a whopping 21%\* share increase. Clearly the traditional 'big four' is no more. (\*Kantar Worldpanel figures)

When Aldi opened its first store in Birmingham in 1990, it was predicted by many to fail. Discounting is inherently a hard sell because it involves limiting range and choice, and forgoing the familiar brands people know and love. Back in 1990, then Tesco Managing Director David Malpas wasn't worried: "We can live quite happily in our part of the market, and they can live in theirs."

Unfortunately for Tesco, however, that's very much not been the case. Aldi's real magic trick has been to invert attitudes towards discounting, finding the joy in many of those negative associations.

People delight in unearthing new brands and hidden gems, they love the mythical middle aisle, and marvel at how quickly they can get through the checkout (by the way, Aldi say they scan 40% quicker than other supermarkets because they slap barcodes on every side of their products meaning cashiers don't have to waste time searching for them).

The joy of Aldi is clear from our Most Connected Brands data. Aldi's biggest gain year on year is in Brand Connection, which captures brands' emotional bond with consumers. Aldi moved up twelve places in the emotional ranking to 8th place. They're now higher than any other supermarket.

This seems to be something that Aldi have actively pursued through in their advertising. Alongside talking about price and value they've introduced elements of humour, warmth, and fun.







That's seen in their Kevin the Carrot brand mascot (available to buy from your local store until they sell out again), and the launch of their 'I like it like that' campaign in 2021 (designed to get people to reassess their perception of the brand in a fun way). They've even started to talk about 'Great British quality' – focusing on provenance and sustainability through their support of the National Farmers Union.

So while others pivot to talking about price (naturally and sensibly given the cost-of-living crisis) Aldi has the advantage of already owning that space implicitly. They've been able to combine value with a sense of joy, fun, and purpose and it's paying off for them in spades.

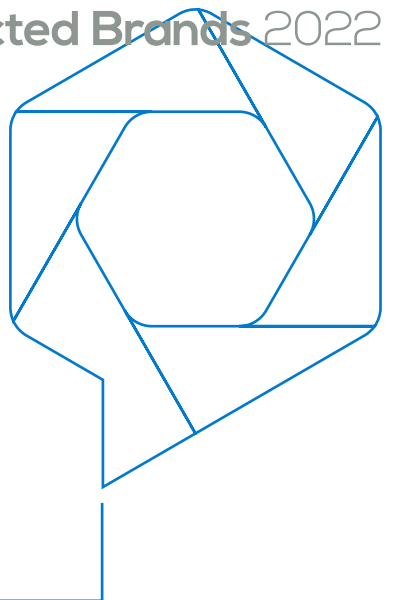






	2021 Ranking	2022 Ranking	Change
	20	8	+12 ↑
	13	10	+3 ↑
M&S	8	12	-4 ↓
Sainsbury's	9	9	0 —
	39	18	+21 ↑
	31	29	+2 ↑
Iceland	47	31	+16 ↑
	21	30	-9 ↓
	43	41	+2 ↑
WAITROSE & PARTNERS	57	70	-13 ↓





## Finding the right tone

As we move into an era of unprecedented belt-tightening, what Aldi also teaches us is that brands don't necessarily have to be sombre and subdued themselves to strike a chord.

This seems like something the rest of the market has realised too. Asda (another successful climber in this year's Most Connected Brand list) has switched its famous 'that's Asda price' tagline to 'get the Asda price feeling'. In doing so acknowledging the joyous side of getting a bargain.

2022's Christmas ads also sees this tonality challenge play out. The tagline for Tesco's ad is 'we stand for joy', acknowledging

the consumer need for fun even in dark times. Meanwhile the deliberately downbeat feel of the John Lewis's 'Skateboard' ad (which focuses on a worthy and important cause) has been criticized by some for not getting the tone right (in fact, The Guardian described it as "the most unapologetically depressing thing in human history").

Given the tough times we're all facing at the moment, it's natural for brands to look to reflect this in their strategy and communications. What Aldi demonstrates is that while brands look for a suitable tone to match this, it's important not to forgo the joy.



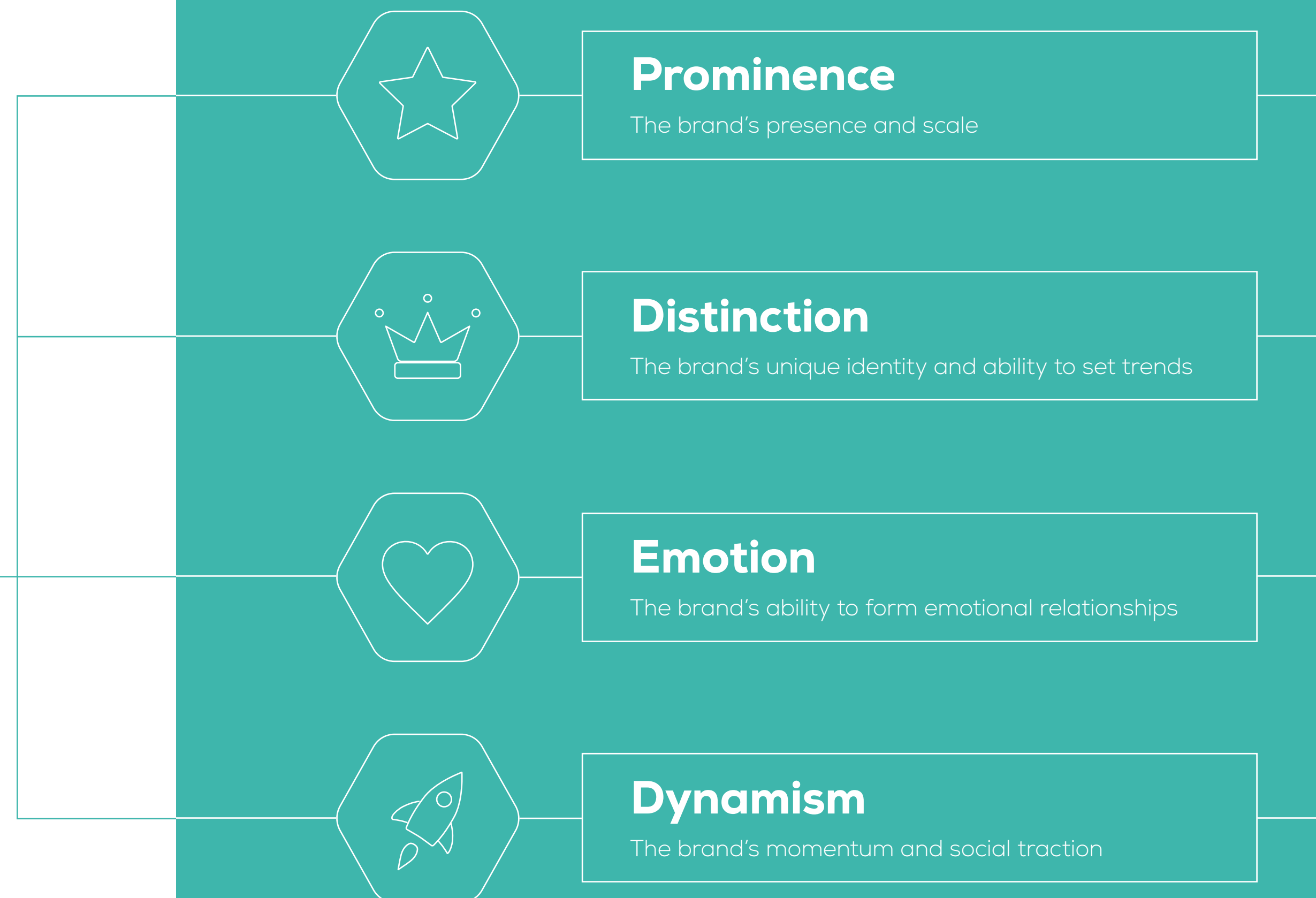


# Methodology

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## 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

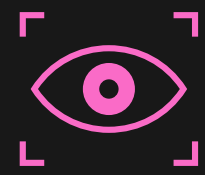
#### Brand revenue

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





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What people think,  
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# Let's chat

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