



What people think,  
feel and do



# The Most Connected Brands 2018

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



**What people  
think, feel  
and do** \_\_\_\_\_

## Who are we?

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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.

# Not just another brand index

## Foreword

Why launch another brand index? This is probably the question we've been asked more than any other over the last few months. And, from an outside perspective, we can understand why. There are 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 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. 6,000 consumers, 11,000 spontaneous brand mentions and 48,000 brand reviews, all fed through our analytical framework.

No black box solutions.

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

Whether you read this report from cover to cover, or simply flick through the pages until something catches your eye, we hope it inspires, excites and interests you to hear from the people who make brands what they are.



**James Endersby**  
Chief Executive,  
Opinium



**Emily Dickinson**  
Director,  
Opinium

## Who we spoke to

**6,000**

UK consumers

**11,000**

Spontaneous brand mentions

**48,000**

Brand reviews

**27**

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 five 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 **five key characteristics:**



### Prominence

The brand's presence and scale



### Distinction

The brand's unique identity and ability to set trends



### Emotional Connection

The brand's ability to form emotional relationships



### Popularity

The brand's dynamism and momentum

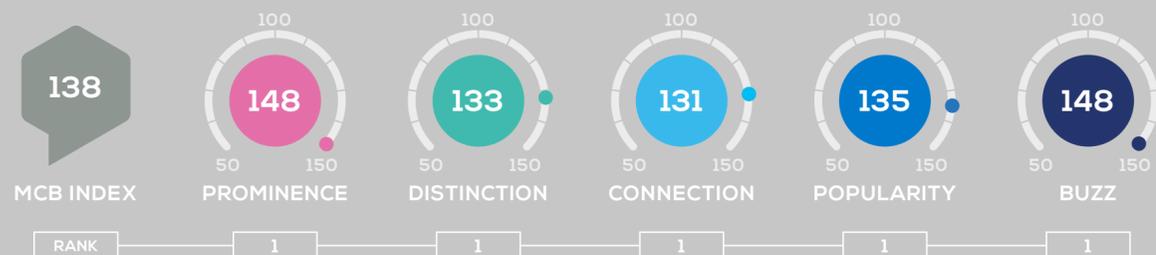


### Buzz

The brand's social traction

# The top 50 Most Connected Brands

01	amazon	02	Google	03	HEINZ	04	BBC	05	Apple	06	YouTube	07	SAMSUNG	08	Cadbury	09	ebay	10	Microsoft
11	Coca-Cola	12	PayPal	13	TESCO	14	WALKERS	15	Kellogg's	16	Argos	17	dyson	18	LIDL	19	M&S	20	Colgate
21	ALDI	22	FAIRY	23	Boots	24	Sainsbury's	25	facebook	26	SONY	27	McVities	28	Dove	29	McDonald's	30	NETFLIX
31	BirdsEye	32	Morrisons	33	NIVEA	34	WhatsApp	35	adidas	36	IKEA	37	mastercard	38	Disney	39	Nestle	40	ASDA
41	Iceland	42	Gillette	43	NESCAFÉ	44	JOHN LEWIS & PARTNERS	45	NIKE	46	PRIMARK	47	Ford	48	Tetley	49	Panasonic	50	hp



## A pivotal moment for the 'Everything Store'

As Amazon's influence and operations continue to extend into more areas of our lives, UK consumers appear even more willing to embrace the online retailer.

Coming so clearly top of our Most Connected Brands Index against such a diverse field is no mean feat, especially for a brand that only entered the UK market as an online bookshop 20 years ago.

The 'Everything Store' is reaching a turning point in its evolution. Not only has it now followed Apple into the trillion-dollar club, it has recently started regularly posting profits as it finally capitalises on the hockey-stick growth in sales it has cultivated over the past two decades.

Its ambitions beyond retail look to be growing too. The company's expansion into fresh food delivery through the acquisition of Whole Foods in the US could soon be emulated

in the UK, adding to the fears of traditional retailers. Meanwhile, the Amazon ecosystem, incorporating personal assistant Alexa, smartspeaker Echo, and the delivery-come-media-subscription service, Amazon Prime, will look to bind consumers more tightly to the brand in more aspects of their lives.

But such growth does not come without risks. The one area of our index in which Amazon significantly under-performs is on the issue of social responsibility.

While it may not have attracted quite as much criticism as other tech giants recently, the brand could be forced to re-evaluate its famously reticent communications strategy to mitigate these risks.

Nonetheless, UK consumers seem more willing than ever to rely on the little brown boxes they receive through the post.



## Brand expert view – Amazon

**Our aim is to be Earth's most customer-centric company and we put customers at the heart of everything we do, so we really appreciate that customers feel so connected to Amazon...**

We are constantly looking for ways to keep raising the bar of customer experience and UK consumers are amongst the most tech-savvy in Europe, with the highest rates of shopping through digital channels and highest use of digital entertainment services. That's

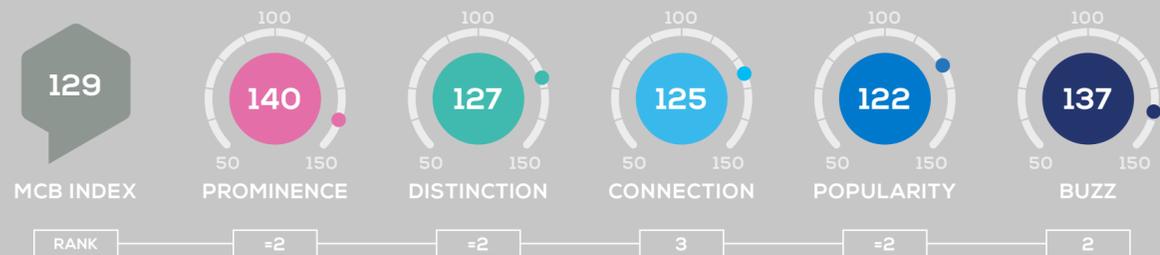


**Doug Gurr**

UK Country Manager, Amazon

why we've been here for 20 years and continue to invest and create thousands of permanent jobs across the country.

However, as we often say at Amazon, it's still "Day One". So we will strive to continually improve the service we offer customers by using the internet and technology to ensure they can find, discover and buy anything they want to online. At the same time, we will continue to empower businesses and content creators to maximise their success, by putting them in direct contact with consumers.



## Finding what consumers want, before they know they want it

It's now over twelve years since "to Google" entered the dictionary, and the strength and ubiquity of the brand has only grown since that point. Although it misses out on the top spot, Google is still viewed positively by UK consumers, and for most, it is almost impossible to imagine an internet and a world without it.

Google's stated mission to "organise the world's information and make it universally accessible and useful" has taken it from a search engine to a multibillion dollar brand at the forefront of technological developments. Indeed, it's easy to take for granted just how revolutionary some of its earlier products, such as Google Maps, Google Translate and Gmail were, and still are.

Yet, from the perspective of both consumers and advertisers, the power of Google lies in the fact that it is the very starting point of most online journeys, from finding information to making a purchase. And despite this history of innovation, Google is still, at heart, a company that sells advertising and data.

The growth of the data to which Google has access, such as through the company's Android operating system, places it in an ideal position to develop and capitalise upon new technologies such as machine learning and artificial intelligence.

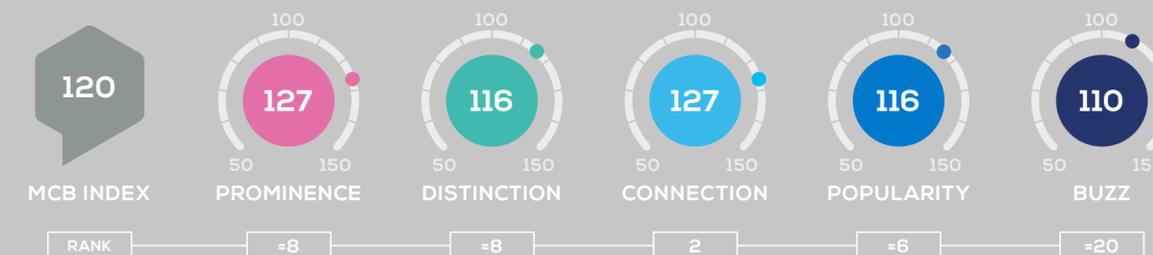
But it also poses a reputational risk for a brand whose famous key ethical injunction is "don't be evil". EU regulators are now taking a much keener interest in the company's exploitation of its potentially monopolising position in search through Android, leading to significant fines. Meanwhile, it may not have taken as much of a reputational hit as Facebook in recent times, but the new-found consumer awareness of the bulk collection and potential misuses of data could yet come back to haunt them.

Despite this, consumers place immense trust in Google to find them what they want, when they want it.





HEINZ



## Beans, always, meanz Heinz

If variety is the spice of life, Heinz has plenty of it. 57 according to the label. In fact, with over 5,700 products globally it's no surprise that Heinz is the highest rated FMCG brand. That it comes third, breaking up the dominance of the tech brands is perhaps a surprise.

However, be it ketchup, salad cream, soups or baked beans, the sheer ubiquity of the brand and its products means Heinz is guaranteed to feature in every consumer's kitchen and has done since we were children.

That is very much a feature of our data, with Heinz being one of the brands that consumers are most familiar with and have a strong emotional connection to. Heinz may not have the

buzz of brands like Google or Apple, but 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.

As consumer demands for health and well-being increases, Heinz have clearly delivered. Consumers implicitly link Heinz to feelings of belonging, happiness and comfort. Heinz means home. A great example to brand owners of delivering on classic human needs and that a long-standing brand can still be as relevant today, as it ever was.

The future can only be ketchup, mayochup and away.



## Brand expert view – Heinz

# More than 57 Varieties of Market Leadership

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.

Celebrating its 150th birthday next 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 with its iconic 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.

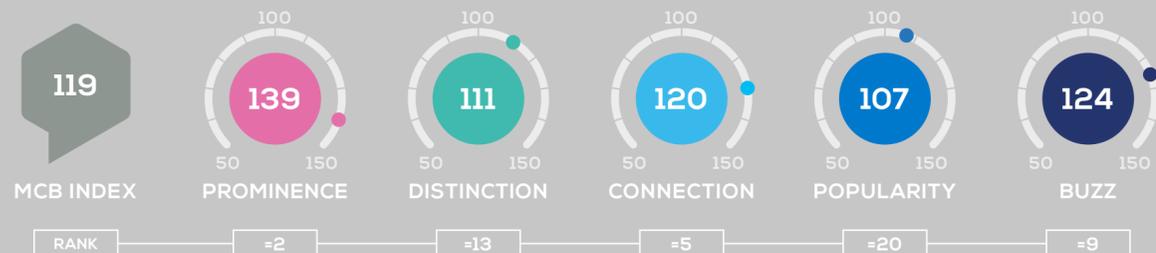
Driven by consumer insight and our innovative culinary skills, Heinz has also invested in bringing new recipes and pack formats to the market including microwaveable Snap Pot Heinz Beanz and Pasta, and extending the world's best-selling Heinz Tomato Ketchup by meeting the increasing demand for great tasting, reduced sugar and salt alternatives.

This year Heinz Tomato Ketchup No Added Sugar and Salt joined Heinz Tomato Ketchup 50% Less Sugar & Salt, and also follows the launch of Heinz No Added Sugar Beanz.

In 2016, Heinz launched a new Mayonnaise range, further embedding the nation's love of the Heinz brand. Heinz [Seriously] Good, made with free range eggs, enables consumers to upgrade their mayonnaise and has contributed 89.6% of recent category growth to boost overall category value by 7.6% in the last 12 weeks. Heinz [Seriously] Good Mayonnaise has also reached more than two million households with a share which is now at 18.4% in the latest 4 weeks and 17.3% in the latest 12 weeks.

**Vicki Sjardin**

VP Marketing EMEA, Kraft Heinz



## Will there always be Auntie?

The British Broadcasting Corporation (BBC). The Beeb. Auntie.

Whatever the name, the BBC continues to be regarded with affection by the majority of the UK population. But in an age of challenge and disruption, is this enough?

Despite swathes of competitive offerings, 95% of UK licence fee payers still use BBC services for an average of 18 hours every week, whilst the corporation's international services reach nearly 350 million people across the world. The public continue to strongly support the organisation's mission, ideals and values – they want the BBC to inform, to educate and to entertain. And, despite repeated attacks on the value the organisation provides, the BBC remains the second highest brand in our Index that consumers say they could not live without.

The BBC, however, has not and cannot rest on its laurels. Whilst, according to outgoing Trust

Chairman Rona Fairhead, it remains one of the world's most trusted news organisations, the threat of fake news and content increasingly driven by algorithms is an ever-present and growing challenge for the Corporation. Tasked by its Charter to represent the views of a changing UK whilst competing with commercial streaming services such as Netflix, the BBC is investing heavily in the diversity of its content. This includes television and radio, as well as digital children's content to ensure that its output is not simply creating echo chambers that repeat what has gone before.

The organisation is undoubtedly facing one of the most testing periods in its history; budgetary cuts, the need to innovate to meet the digital demands of a new generation of consumers and the entry of new competitors to the market place all pose significant challenges. But the BBC remains resilient and recognised for its position as one of the most prominent, and iconic, brands in the UK.

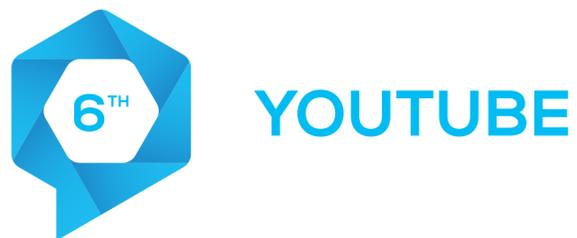




## Building a trillion dollar valuation off a reputation for innovation

Apple's unflinching philosophy has powered their products and created one of the most iconic brands in the UK. They have built a trillion dollar valuation off a reputation for innovation. It's hard to think of a company that has so overtly revolutionised entire industries through a single product in the same way that Apple has. The Macintosh computer, iPod and iPhone all changed perceptions of what was possible from a consumer electronics company. Technology went from clunky and geeky to sleek and sexy. It's hardly surprising that Apple tops the list of brands that are 'always looking to push boundaries', comfortably outranking Amazon, Google, Dyson and Samsung on this measure.

Whilst Apple's products are part of the story, the old 'Think Different' tagline, the stark white outline of headphones on iPod marketing, even Steve Jobs himself, have contributed to the perception of Apple being different and setting trends. Indeed, it illustrates the power of consumer perception that both the Macintosh and iPod used already available technology, but were considered to be revolutionary products in their category. However, Apple has mastered its core philosophy of designing good-looking, user friendly products and selling consumers their story of innovation.



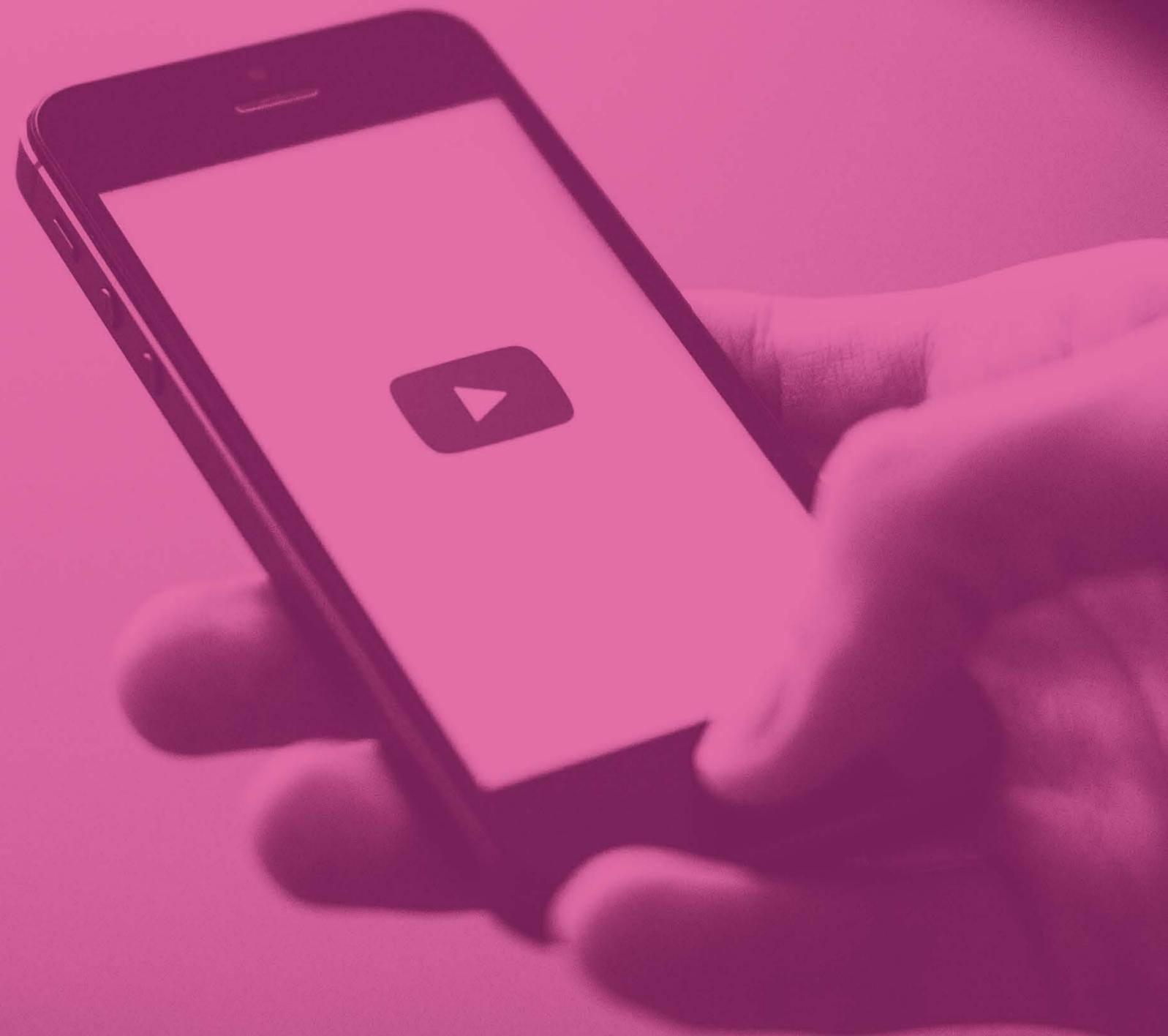
## The disrupter comes of age

At the start of this year, YouTube had over a billion users – almost a third of all people on the Internet – and each day those users watch over a billion hours of content. Content, that ranges from slick corporate promotions to the two million cat videos that have generated over 25 billion views worldwide.

For traditional media players, the seemingly unstoppable rise of YouTube represents a growing challenge: the video sharing platform currently reaches more 18-34 and 18-49-year olds than any cable network in the US. Yet YouTube’s ability to connect with viewers, and younger viewers in particular, is not simply driven by its accessibility – over half of all YouTube views come from mobile devices – but by a heady mix of humour, education and entertainment that amuses, surprises and in turn angers, the general population. The tech giant’s ability to

elicit such strong emotions, be they positive or negative, reinforces the perception that the brand is pushing the boundaries of content and despite being a subsidiary of Alphabet, its independence.

As the company enters its thirteenth-year, however, it is not prominence, but transparency and communication which are, according to CEO Susan Wojcicki, key priorities for the brand. Whilst YouTube continues to provide a service which many ‘could not live without’, the platform’s ability to articulate its green credentials and convey the benefits of its re-branded YouTube Premium offering are less well articulated and understood. This presents both a challenge and an opportunity for the tech giant which knows that, like the cable companies it is currently usurping, dominance without connection can only last so long.



## Brand expert view – YouTube

# YouTube is a force majeure within the bloggers sphere

And it has been for a long time. Those that got on the bandwagon quick and early, like Jim Chapman, have really exploited its potential.

I still believe the American Male Bloggers are doing it best, at least commercially. They are more direct and informational, which is good for brands that are keen to get the message out there. They build a mass of subscribers by enticing the early birds to comment, rewarding them with giveaways and discounts.

Look at the likes of Antonio from Real Men Real Style for example. You look at one of his videos it's crystal clear, sometimes its a bit 'fashion for dummies' but he has really invested in his YouTube platform. He has a network of people who pitch ideas, then another

team writing them, then another team doing the thumbnail graphics, another team edits etc.

But it makes sense, when you reach that level the best way to make money is by being extremely efficient and farming out some of the work so you can concentrate on generating revenue. Entrepreneurs work on the business, not in the business.

The real dividing rod comes when your platform becomes a walking billboard. I'm sure I'd love a set of shirt garters for the right price but I've not much interest in doing videos about those. I prefer to make mine stylised, be a little more creative. It's all well and good describing the benefits of a certain fabric, but people really want to see what it looks like, they need to contextualise it.

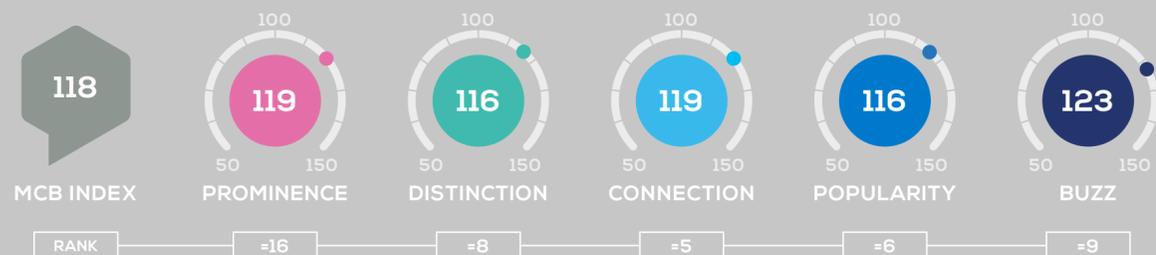
As far as revenue is concerned I only do the odd

sponsored post and my advertising income is minimal. I subscribe to the 'rule of seven'. If someone sees something seven times as described by Neil Patel and Eric Siu on the Marketing School podcast. If someone sees something they like, they might not click through or engage straight away. But if they see it seven times, i.e. an Instapost, then a Facebook link, a Twitter post, etc. then they'll finally cave and see what all the fuss is about. That's what I use my YouTube for, another source of outreach.

It's also another additional bonus I can lend to brands as part of a campaign. My main revenue source for advertorials is Instagram, stories and posts. The blog is a nice thing to have for people wanting to know more. I don't do much on Facebook because a lot of content gets buried so fast thanks to their algorithms. When I do something on YouTube for a brand, it's often me going that extra mile.

**Carl Thompson**

Social Media Influencer



## “We make what can’t be made, so you can do what can’t be done”

Doing the impossible has been central to Samsung’s campaigns over the past 12 months, with a focus on innovation that makes life easier for its customers. By 2020 the tech giant promises that every product it creates will be connected, giving customers complete control of their smart devices, from washing machines to radiators, through their smart phones.

Despite the potentially intimidating and futuristic innovations, Samsung, a global leader in screen technology, has taken a different approach to communicating tech to its customers, largely down to appointing a CMO with a background in consumer goods. This has enabled Samsung to adopt a more customer-orientated approach by focusing on making technology more human, available to all and simple to use.

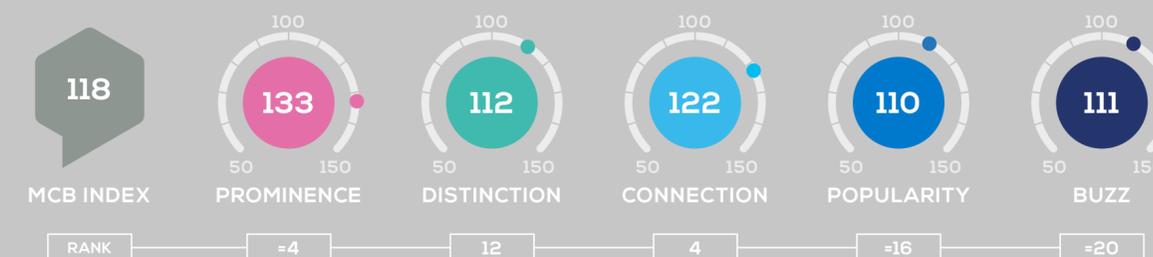
With this in mind, one area that Samsung outperforms its tech rival Apple is on its emotional connection to consumers. Recent mobile campaigns that highlight common pain points of competitor products have also boosted their customers likelihood to recommend their products and services.

However, for any tech brand seeking to lead or maintain leadership in its category, it is important to be seen to lead and not to follow; Samsung has entered into the innovation race and given the strength of its competitors and the switching nature of one of the key categories it operates in, we would expect brand loyalty to last only as long as the brand continues to innovate.





CADBURY



## In a world of change, Cadbury is a shining light

It's fantastic to see a great British brand like Cadbury in our top 10. Founded way back in the 1800's in the heart of the Midlands, the Cadbury brand is as strong today as it has ever been. One of the most loved brands in our Index, Cadbury truly has a strong emotional connection with consumers bringing a smile to their faces and comfort to their hearts.

In a world of change, Cadbury is a shining light for remaining true to the brand ethos and reflecting this throughout interactions with

consumers. It is therefore no surprise that Cadbury is ranked as one of the UK's most iconic brands by consumers; if ever a brand owned a colour, this one does. That consistency has also shown in communications such as their "advent calendar" Christmas execution being one of the top performing ads each year since first airing three years ago.

UK consumers clearly all still need a little self-indulgence, and Cadbury is still right at the top of the list to deliver it.

## Brand expert view – Cadbury

# It was always going to be difficult

It was always going to be hard for Cadbury, an iconic, beloved British brand, when they were acquired by American Mondelez, then Kraft. People worried they would change the recipes of their favourite products (they did). People joked a company known for their cream cheese would release a chocolate cream cheese (they did). People worried they'd make the chocolate smaller, or expensive (they did both). The Government wanted confirmation they wouldn't move manufacturing away from the UK (they did, but then moved it back). No wonder that Cadbury's have changed direction with their advertising this year, marking a slightly awkward end to what was meant to be a 10 year

brand platform by abandoning their Joyville positioning. Just like Coke's Open Happiness, trying to 'own' Joy always felt forced, and unlike drumming gorillas and dancing eyebrows, failed to make a dent in popular culture. With Brexit looming and the company warning that prices will have to go up, Cadbury needs to work hard to make it a brand British people think is worth paying for.

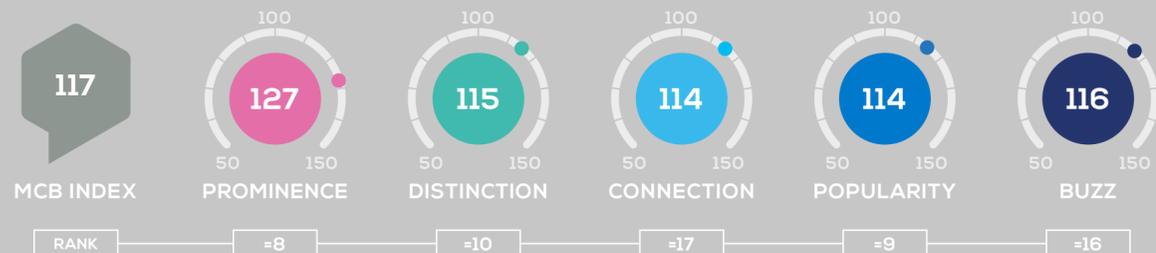
Starting the year with "Mum's Birthday" showed a clear change in direction, a more serious, yet sentimental, ad shows a young girl paying for a chocolate bar for her mum with her favourite trinkets. The shopkeeper accepts her payment before returning a miniature unicorn as "change". Unshackled from joy, the ad shows the bigger emotional power of a chocolate bar. A pop up shop that allowed consumers to buy chocolate with their own trinkets was a nice, obvious extension.

Stealing a well worn marketing tactic of getting the public to make a new product followed with an advert encouraging people to "Go Madbury". With a whole host of different characters the ad tries hard to show that Cadbury is part of the fabric of the nation. It's also an unsubtle nod to Cadbury's NPD these days essentially putting Mondelez products into a Dairy Milk bar.

Cadbury have also leaned into perhaps their biggest threat, the ever growing war on sugar, by strengthening their association with football. Since becoming an official sponsor of the Premier League in 2017 they have run multiple promotions including an on-pack promo giving customers the chance to play five-a-side with football stars such as Thierry Henry. They're also set to launch a reduced sugar bar in 2019, though there's no word on a lighter version of the Philadelphia Dairy Milk, yet...

**Mike Phillips**

Head of Strategy, All Together Now



## Bringing all things to all people, everywhere

eBay's brand strengths lie in its ubiquity. Nowhere else can you shop for products as diverse as Britney Spears' hair collected during her 2007 meltdown, water from a glass Elvis drank from, to a ghost (though the last item was removed as eBay states intangible items cannot be sold on the site).

The diversity of products offered, lies at the heart of eBay's appeal – one of the first items sold on the site was a broken laser printer, the founder Pierre Omidyar contacted the winning bidder to explain it was broken and he responded "I'm a collector of broken laser printers". Therein lies the beauty of eBay catering for all wants and needs – offering an emotional pay out of inspiration, surprise and the ability to make us smile.

On a more practical level the fact that fees come from sellers rather than buyers, ensure the brand is seen as good value for money and as a brand we couldn't live without.

eBay has also been shrewd in its acquisitions, with PayPal and Skype both once owned by the tech giant.

In terms of staying relevant for the future, the company is diversifying its brand portfolio, with Buy It Now, eBay Classifieds in the online advertising arena and StubHub in ticket trading.

The one area to improve lies in its corporate reputation: consumers do not believe that the brand puts people before profit, nor do they think that eBay considers the environmental impact of its actions. Reputational damage was exacerbated in 2014 by a major security breach. It appears, however, to be trying to tackle its environmental impact, investing in a new solar powered building on its campus that prevents 37 million pounds of carbon dioxide being released into the atmosphere.





MICROSOFT



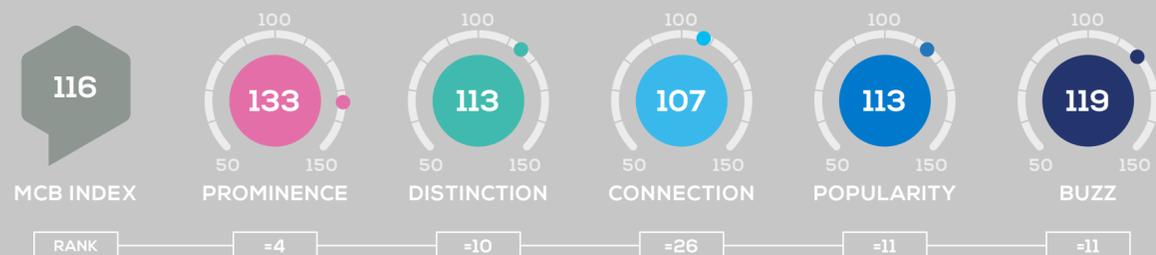
## A safe pair of hands in troubled times

Rounding off the top 10 Most Connected Brands, you would struggle to find someone who hasn't heard of, or used, Microsoft Windows or Microsoft Office. The software and computing behemoth has quite rightly outstanding familiarity among consumers, who are just as likely to use Windows and Office at home as they are at work. Other offerings include Xbox and Bing, and each individually make up a signature colour in the Microsoft logo.

Microsoft have made big name acquisitions of LinkedIn and Skype, supporting and building on their mission statement to help individuals and businesses realise their full potential. Their drive to move out of established core services and give themselves a foothold in the communications space, is perhaps an attempt to match the fast moving competition in Silicon Valley.

One difference that Microsoft does have against the competition is its strong association with security. The likes of Facebook and Google have been under intense scrutiny recently on how they use consumer data and keep it safe. This has had a knock-on impact on consumer perceptions, with both tech brands registering high levels of association with fear. Meanwhile Microsoft is strongly associated with security in the minds of consumers.

Being seen as a safe pair of hands is no bad thing as the very nature of data storage and dissemination changes. The rise of cloud computing, coupled with growing awareness of the value of our data, means that more than ever consumers are looking for a company they can trust.



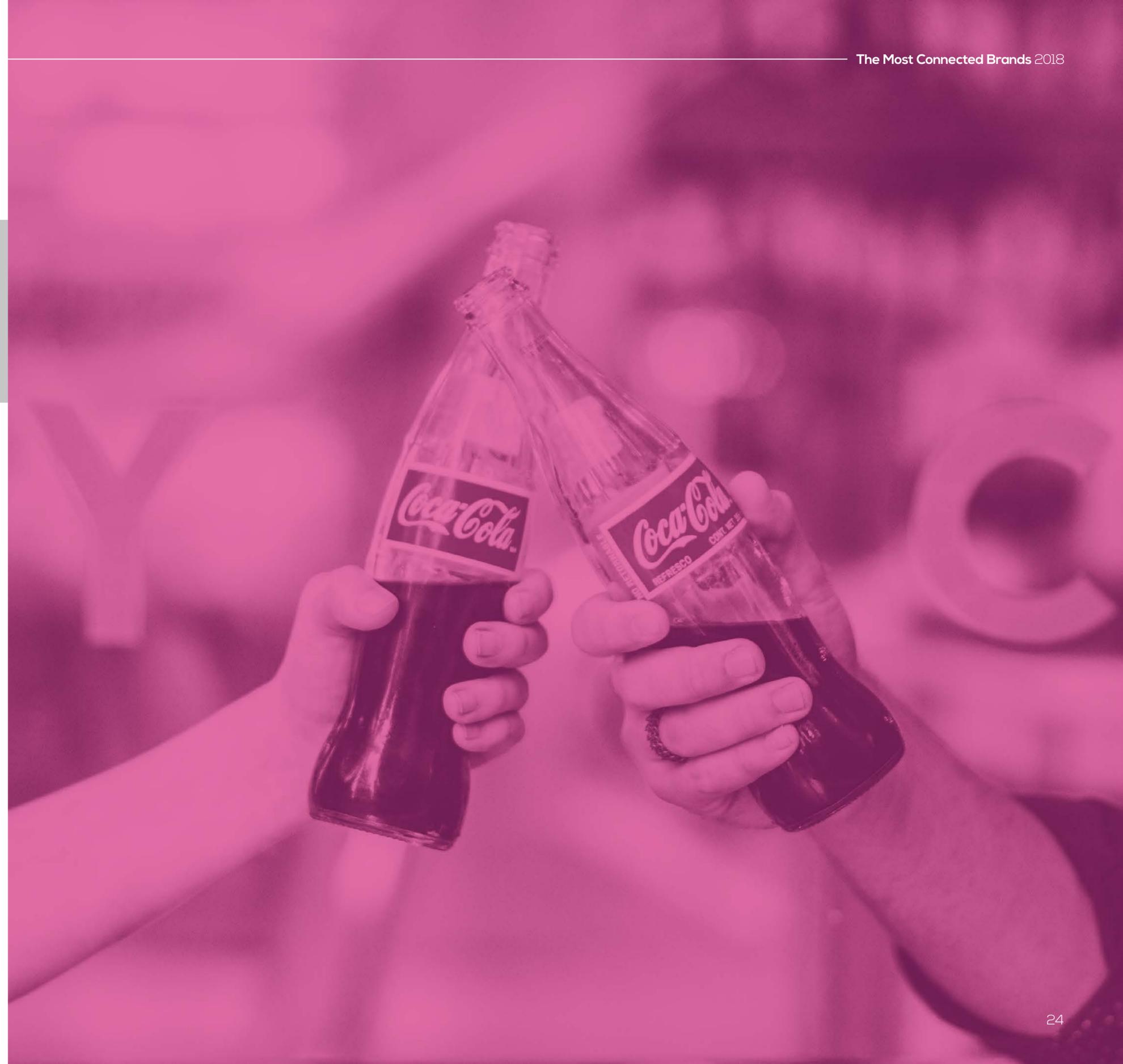
## The giant of the soft drinks market

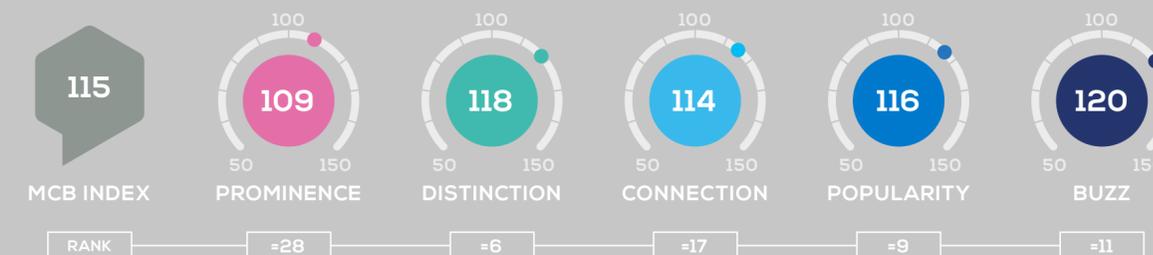
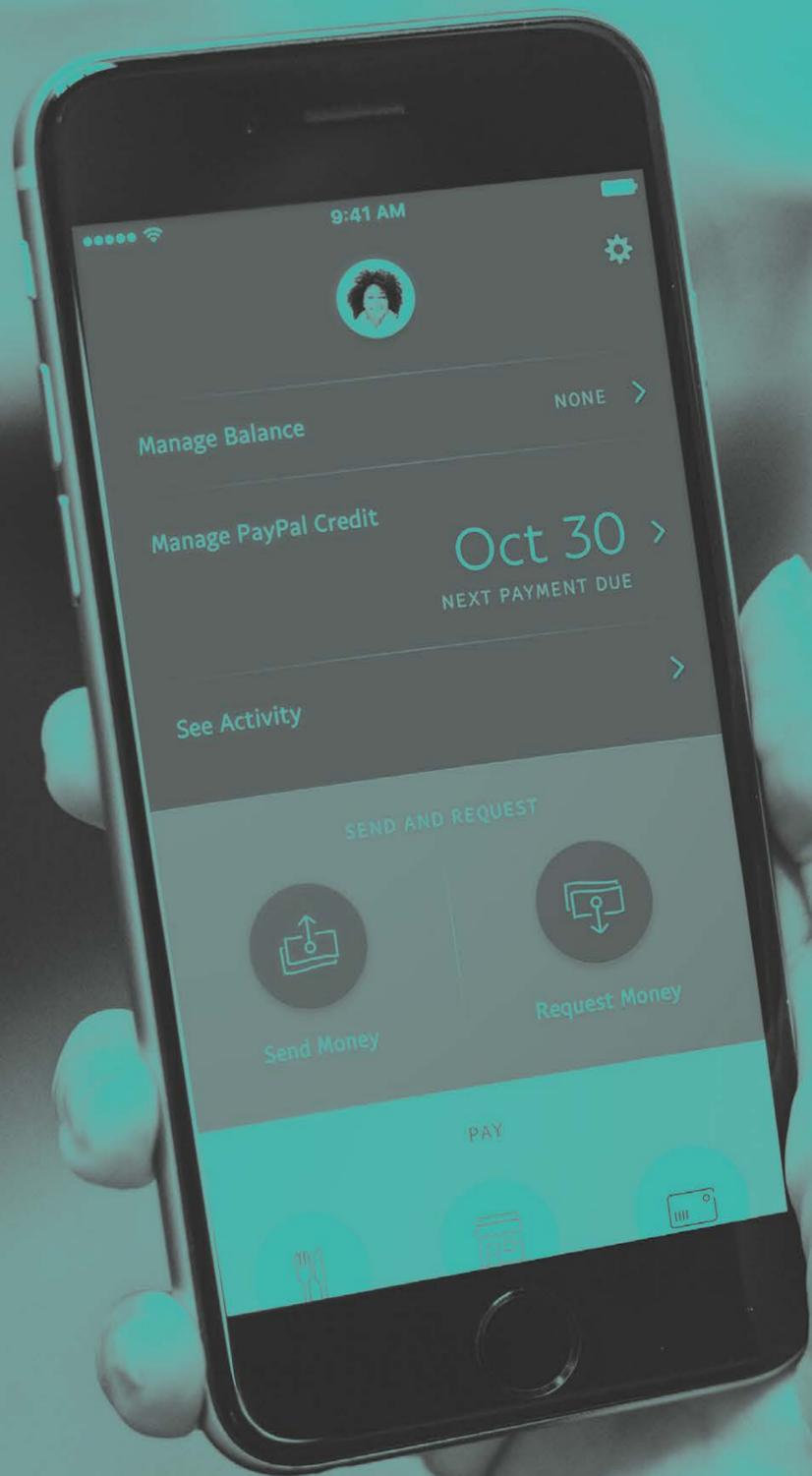
One of the most iconic brands in the top 100, Coca-Cola has not been free from challenges in recent years.

The introduction of the much publicised sugar tax, saw the brand decide not to change its classic recipe, but to engineer smaller pack sizes, believing that the brand was stronger undiluted. The introduction of the tax, however, represents more than simply a legislative move; it is indicative of consumers’ shifting social attitudes. Although the ‘classic’ status of Coca-Cola endures, changing social norms present new challenges for the brand. With soft drink consumers seeking more environmentally and socially conscious products, traditional multi-nationals like Coca-Cola must go the extra mile to prove they’re on board. Our research suggests that Coke could do more in this area; the emotional connection it generates is positive but not to the same extent as other brands of its size.

However, few brands can match Coke on prominence, with world famous branding and advertising of Coke cementing it in consumers minds. Coke very much works within a “you love us as we are” approach, although trading on its iconic status alone would be a mistake. It must continue to adapt and capitalise on the generational shifts that are taking place and keep pace with global trends.

Recent moves have shown that it is listening and adapting to the changing consumer landscape. The diversification, for example, of the Diet Coke line into outlandish flavours such as ‘Exotic Mango’ and ‘Feisty Cherry’ illustrates Coke isn’t afraid to innovate to keep consumer’s rapidly shifting attention. In addition, the purchase of Costa shows that the brand is far from content with its domination of the soft drink market. Diversifying its portfolio with this latest acquisition demonstrates Coca-Cola’s mission to remain a comprehensive provider in the ready-to-drink beverage space.





## The vanguard of the FinTech revolution

PayPal has redefined its connection with consumers and out ranked long-standing financial players such as Mastercard and Visa. Despite being first established in 1998, constant acquisitions, innovations and a clear brand strategy has enabled it to maintain key strengths in buzz, popularity and setting trends. Its core consumer strengths are rooted in safety, seamlessness and speed – all vital in the rapidly evolving FinTech payment arena.

PayPal successfully balances a dual acquisition and retention strategy. For existing customers; it offers values they can relate to, understands what is important to them and consequently is felt to be a service they couldn't live without. For

new customers, its scale offers reassurance and constant innovations such as One Touch ensure it is a brand that is universally considered.

Most recently it has focused its strategy on mobile payments; providing a unique two-sided, end-to-end interface for digital and mobile transactions. With financial revenues up by £7.7m, the strategy is clearly working.

Despite being a category that offers no physical product PayPal successfully evokes a positive emotional response, offering its users a sense of pride, independence and above all safety in the world of digital payments.

## Brand expert view – PayPal

# The changing role of the payments giant

PayPal is huge. And getting huger. Up 29% on the previous year, USD\$139bn was traded on its platforms last year. In addition to gaining new customers, growth was accelerated by corporate acquisition. And acquisition is driven by strategy. PayPal wants to be the world's largest open payments platform – the emblem of 'new money' and payments poster-boy for the digital age. And strategy is driven by purpose. PayPal is 'fuelled by a fundamental belief that having access to financial services creates opportunity'. It is 'Committed to democratizing financial services'.

Being a connector is what PayPal is all about. So it shouldn't surprise us to see the brand being so highly rated for connectivity. It is a popular brand and a prominent brand. To the point of ubiquity.

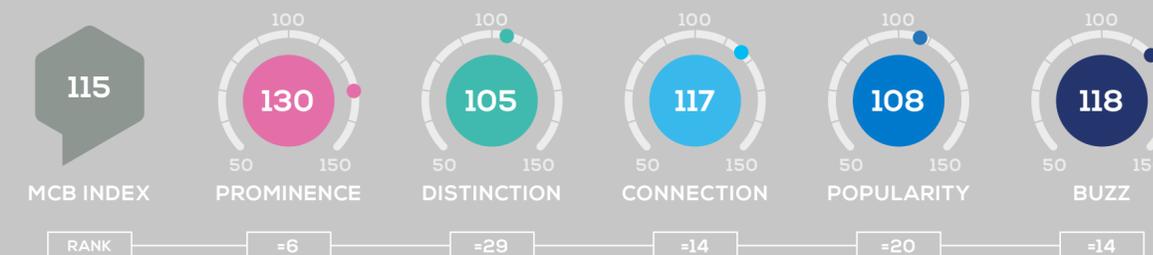
Back in the day, consumers tended to rate and relate to brands they could touch, taste and get to grips with. But in our hyper-connected age, the intermediary can be better regarded than the content provider. UX is king. Hence brands such as Google, PayPal and iPlayer featuring highly for buzz. But PayPal is not the only game in town. New and established competitors abound. Apple Pay. Circle Pay. Visa. Etc. Whilst other platforms are available, PayPal has succeeded in becoming the category champion. And that's where they might run into brand problems.

Being short-hand for the category can turn a brand into a generic term. Think Hoover. **PayPal considers itself a challenger. But when digital payments are the norm, doesn't that turn David into Goliath?** The establishment not the underdog. And as the de facto trust mark for online payment, PayPal's marketing spend is supporting competitors' activity. All boats rise on the tide. Continual

innovation can maintain a brand's momentum and distinctiveness. Think Google. But this brings a second challenge: Mission-creep. CEO Dan Schulman says that PayPal's technology enables it to expand into banking services and adds that "We are just beginning to scratch the surface of the opportunity in front of us". But isn't simplicity one of the things we like best about PayPal?

So, what is the brand opportunity for PayPal? To move from being a strategic partner of e-tailers to aggregating approved services? Credit checking? Personal finance advice? Watch this space. But in the meantime, it might be wise to drop the term 'disruptor'. Surely it's now a tired and tainted concept associated with arrogance and unpleasant behaviour? Including that of founder Elon Musk. Distancing the brand from such language and associations could provide a chance to further strengthen PayPal's connectivity and emphasise humanity and humility.

**Alec Rattray**  
Consultant



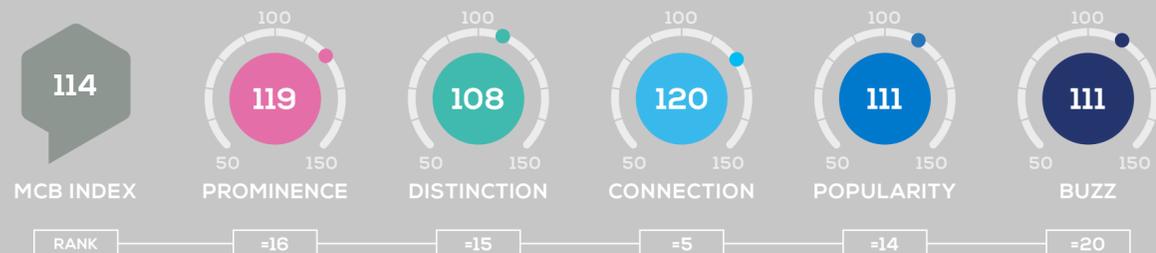
## Every little helps Tesco keep ahead of the competition

Tesco has withstood a difficult trading period over the last couple of years with the emergence of the discounters eating into its leading market share. Nonetheless the brand remains our highest rated supermarket.

Notoriously hard on suppliers, Tesco is looking to further improve its buying position by teaming up with French giant Carrefour to drive through better deals. However, consumers are possibly more concerned with the work Tesco has done to improve wider society, with the brand being rated in our top 10 for social responsibility. Clearly the work the company has done around using certified sustainable sources across the massive range of products it offers is not going unnoticed.

This has also been coupled with a more real-life approach to Tesco's above-the-line communications with the "food love stories" campaign which has been running for the last couple of years. Tesco is a brand that does not struggle to achieve prominence or familiarity with consumers due to their massive store estate, but criticism has been levelled in recent times that the brand had lost its connection with consumers.

Our study would point to the fact that Tesco has started to turn the corner in this area with consumers starting to feel the love again for the UK's no.1 supermarket. Whether Tesco can retain it, is yet to be seen.



## A staple of the UK diet

Celebrating 70 years of being in the nation's shops this year, Walkers crisps are synonymous with lunches, snacks and visits to the pub. It's no surprise therefore that the UK's best selling brand of crisps is in the top 20 Most Connected Brands in the UK.

Walkers has a very strong connection with consumers and makes much of its local and national connections, from suppliers to marketing.

Twenty years of humorous adverts featuring a smiling Leicester-born Gary Lineker has cemented Walkers as an iconic institution in the

public consciousness – a part of wider cultural history. It's no surprise that Walkers is one of the brands most likely to make the public smile.

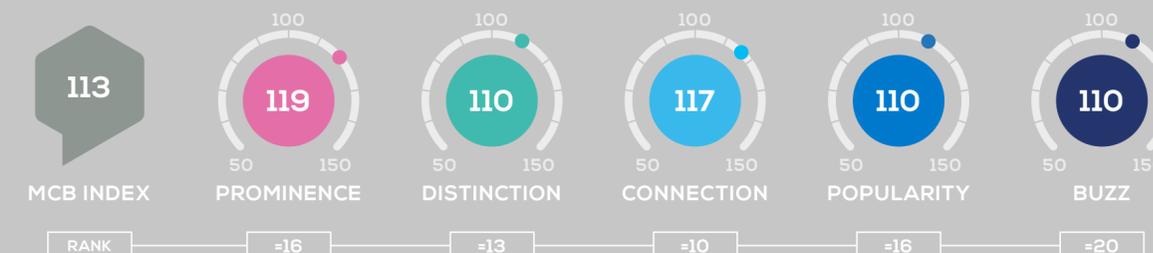
Its heritage, ubiquity and familiarity mean that the brand and its products should easily withstand ongoing discussions around public health and healthy eating. As Walkers adapts to contemporary needs (for example, committing to 100% recyclable, compostable or biodegradable packaging by 2025), it will no doubt maintain its place in the lunchboxes, tables and picnics of the nation.

Crisp?





KELLOGG'S



## What did you have for breakfast?

Chances are it was a bowl of Kellogg's cereal. And if you have children, it's even more likely. Brits have been eating Corn Flakes, Rice Krispies, Frosties, Special K and other cereals since 1922 making them one of the foremost household names in the country. Kellogg's cereals are a familiar part of life across the generations and etched into the memory of most of us from an early age. It's no wonder that we feel high levels of familiarity and consideration for Kellogg's.

Like similar brands Kellogg's faces the challenge of changing the 'junk-food' image of some of its products. Last year it announced it was axing Ricles from its range of breakfast cereals in a bid to cut sugar and recently had an advert banned by the Advertising Standards Authority,

for its Coco Pop's Granola cereal. Considered a healthy product by Kellogg's the advert was banned based on use of the existing Coco Pops branding, which was seen to have the effect of promoting a high-sugar cereal.

Nonetheless, the future looks strong for Kellogg's cereals. Despite increased demand for healthy food and the introduction of the 'sugar tax' the top children's cereals, Coco Pops, Rice Krispies and Rice Krispies Multi-Grain Shapes, all from Kellogg's, each now has less sugar than they used to. In its product development and marketing it is looking to overcome these recent challenges and continues to work hard to make sure it's the number one choice on our breakfast tables.

## Brand expert view – Kellogg's

# You spoke, we listened: How Kellogg's uses social to develop its brand offering

I think the main thing to pull out in terms of our approach to social media is that it's very much a tool to host conversations on vs a one-way dialogue with consumers. More and more often we are spending considerable time and resource in evaluating the feedback and the sentiment that we get from consumers in response to campaigns, but also proactively regarding our products. For example, conversations which relate to the production of our food, the sustainability of our practises, our ingredients and then subsequently the major talking point around many FMCG companies who deal with food is around nutrition as well.

Social is often demonised as it is very hard to regulate, very hard to control and brands have massive exposure to risk. But

I think you can flip this very easily and remember that this is the perfect platform to host those two-way conversations and actually bring a real human, reactive response technique and strategy to how you actually deal with these complaints and how you educate people effectively around the key benefits of our food. Especially if there are any misconceptions about the way we market, create, develop our ingredients then social is the perfect platform to help bust any myths essentially.

We might want to try and drive behaviour changes by facilitating a conversation on cornflakes regarding their versatility – there are so many ways you can actually eat the food and open that up for interpretation and engagement. If you can drive positive engagement around the features of your product then that's a fantastic way to market and to really bring people into the conversations and the stories that you're building for your brands.

Social media has opened up a new channel for a type of communication, a type of messaging that brands receive from consumers. In the past, consumers would email or call when they had a problem with a brand.

Nowadays, social media provides a platform for consumers to share more off the cuff sentiments – musings relating to their day to day routines and the products which feature within their lives. **These raw and reactive opinions provide great insight for brands, particularly when they form a trend with those of multiple other social users over a period time.**

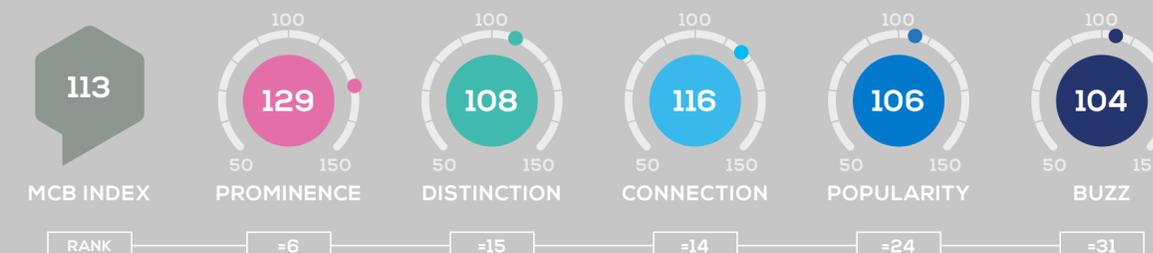
An example of this in action is an early learning that we took from Social Listening when I first joined the business was regarding Pringles and flavour. Twitter users would regularly contact us direct (or just Tweet freely on their channels) asking for us to bring back now-redundant flavours from years gone by. There was one particular flavour that proved immensely popular – Salt & Pepper, which had been an exclusive release 12 months previously. This is a hugely useful and natural resource for us to draw insight from, which can help shape our innovation pipeline. We similarly ran a limited edition re-release of Pringles Snack Pots – which were a late 90s gift with purchase – on the back of a large volume of social requests from nostalgic consumers who remembered them from their childhood. Our campaign launch for this exclusive specifically called out the social noise which had to the decision – “You spoke, and we listened!”

**Joe Harper**

UK & Ireland Social Lead, Kellogg's



ARGOS



## Driving connection through convenience

New TV? Storage Solutions? Paddling pool to take home to your garden after work? Last minute gift for a friend's children? Most likely you would have visited Amazon, but many of us would also have looked at the Argos website or reached for the catalogue to check out the price.

There's no doubt that the High Street is facing increased pressure from online competitors, reduced consumer spending and increased business rates. With its breadth of products, available instore and online, catalogue retailer Argos competes with both Amazon, eBay and traditional retailers, and perhaps because of this is able to ride the current High Street storm. It has been able to absorb market share following the demise of the likes of Toys R Us, Maplin and Staples and the closure of a number of Homebase, Debenhams and Mothercare stores. It also now boasts being the third most visited retail website after Amazon and eBay.

Argos continues to pursue making the shopping experience more convenient for consumers and is investing heavily in its tech team and mobile offering, continuing to go head-to-head with Amazon. Where other High Street retailers have failed, it has successfully fused the online and offline worlds. It boasts fast track fulfilment, offering quicker delivery than Amazon, within 4 hours or same-day collection in store through Click and Collect. However, it's not just investing in online solutions. Following its acquisition by Sainsbury's, Argos is already increasing its physical footprint in Sainsbury's, and soon into ASDA stores, and looks to continue doing so. Even Amazon has recently looked to acquire physical store space.

With more than 800 stores and growing, Argos' prominence isn't likely to diminish any time soon. In a competitive landscape, offering value for money, promotions and convenience, Argos has the credentials to remain one of the UK's top brands well into the future.

## Brand expert view – Argos

# Building a lasting emotional connection with consumers

Here Superunion explains the brand and creative strategy behind Argos that made it one of the strongest performing brands in the Most Connected Brands ranking.

### The challenge

Selling thousands of products to over 70% of UK households through its catalogues and 845 stores, over 40 years ago Argos pioneered the concept of mass value retail.

But with the launch of online shopping, fast in-store iPad-powered 'click and collect' services and a new range of premium products, Argos had grown to become the UK's largest online retailer, offering universally appealing convenience and choice to millions of consumers. Our task was to transform the Argos brand to reflect its new reality as a digital retailer.

We created a new brand built on Argos' unique proposition: to deliver products they want with immediacy, local availability and choice, something we called Super Retail. And with an added new bold, bright personality, revitalised portfolio of own brands, and the approachable, down-to-earth tone of voice, the brand helped Argos take its next pioneering step – becoming the digital Super Retailer, universally loved by generations of UK customers.

### The strategy

Argos offers an optimal blend of online and High Street presence and experience designed for the digital age. Whatever you want, whenever and wherever you want it. So, we built a brand rooted in exactly that.

The bold Super Retailer strategy demanded an equally brave personality that speaks with a confident, active tone of voice, infusing passion and vitality to everything Argos does as a business. The new personality has been expressed through bold and playful bursts of colour, applied to digital and print catalogues, TV and mobile advertising, website and stores.

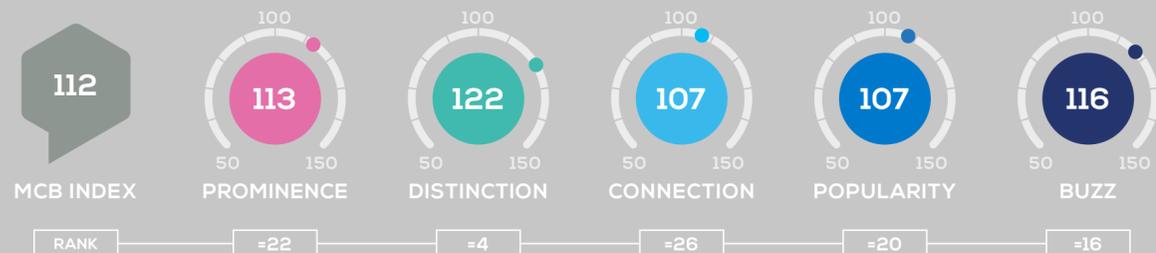
The new personality inspired the redesign of the new Argos' own brands, from the premium Collection range, a mid-priced Home range, to a basic value offering of new home products, for every wallet and occasion.

Starting from just 99p, Simple Value is a range of 140 everyday essential products for the home. We thought simple shouldn't just mean basic. Shifting the meaning from 'basic' to 'simple with a twist', the twist came in the form of simple and honest product descriptors and a bold, award-winning packaging design in Argos' signature red and white. The copy, with a touch of humour, elevates the conversation, speaking in a simple and honest way. From pillows that 'count sheep' to phones that 'catch up on conversations', Simple Value is simply different.

From service innovation ideas, redesigning an entire range of home products, to a new approach to the catalogue and designing colourful characters that guide children through 'My Christmas Wishlist' app, we continued to work with Argos for several years, helping to keep this much-loved retail pioneer one step ahead.

**Inga Howell**

Global Marketing Director, Superunion



## Leading the charge

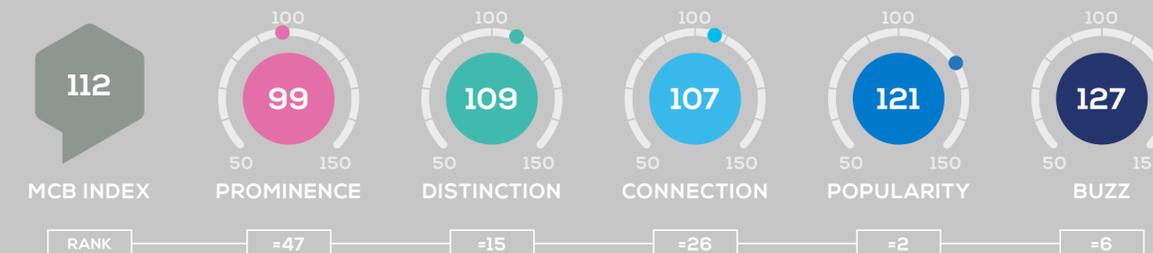
After Apple and Samsung, Dyson is the third brand on our Most Connected Brands Index that actually makes physical products that aren't food. While originally known for vacuum cleaners, Dyson is similarly as synonymous with tech, design and offering premium products as Apple and Samsung. Whether it's bagless and cordless vacuum cleaners or Airblade hand dryers, Dyson is the brand that, like Apple, others follow.

Despite becoming a household name, its products maintain their premium price tags. The products are aspirational, known for their quality in engineering, and they remain a talking point when someone sees one. What other vacuum cleaner or fan manufacturer can boast that level of cool?

But Dyson is more than just the products. It's James Dyson, the man himself. The 71 year old engineer taps into something the British love: the eccentric inventor tinkering in his shed until something works and we admire the hard work and subsequent success. In more recent years, James Dyson has also made headlines with his ardent support for Brexit and as a vocal champion of British business.

However Brexit works out, Dyson the brand and Dyson the man look to remain heroes of the innovative product world taking tech, engineering and design to revolutionise the consumer landscape. Dyson has talked about producing an electric car and earlier this year trademarked "Digital Motor". Could we see a Dyson car on our streets in the coming years?





## No big surprise

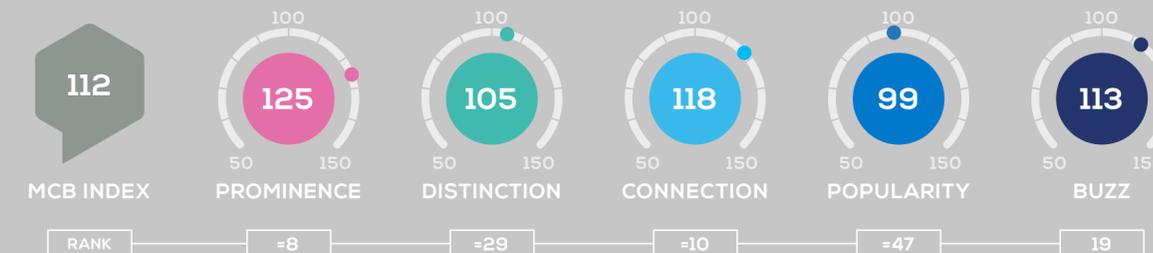
The second highest ranking grocer in our Index, it's been a strong year for Lidl overtaking Waitrose as the seventh biggest supermarket in the UK. After opening the first UK store in 1994, Lidl hit the ground running with growth plans, now offering a network of over 600 stores nationwide.

Lidl has quickly become a family favourite with its staple brand alternatives and fresh produce at very reasonable prices, but it's not without its sceptics. In 2014, #LidlSurprises was launched, a campaign aimed at dispelling myths shared by many on the quality of the products being sold at such little cost. Lidl invited a number of doubters to their farms to highlight the care, skill and efforts that go in to creating Lidl produce, essentially a tongue-in-cheek education piece. Unsurprisingly, the doubters quickly became

advocates of Lidl and the nation were well and truly won over. No wonder they were highly associated with the element of surprise!

Just when you thought high quality food at purse-friendly prices was good enough, Lidl throws clothes into the mix. Their most premium line yet launched last year, Esmara, a collaboration with fellow German national treasure Heidi Klum, offering a range of affordably priced statement pieces for women.

Thinking to the future, Lidl recently announced plans to increase the number of stores in UK cities. Starting in London, the supermarket chain aims to begin the construction of more than 3,000 homes and a primary school in London to secure sites for new stores. Social responsibility wasn't the strongest for the brand in this year's Index, but we've got high hopes for next year.



## Spending it well

Tough trading conditions on the High Street, coupled with the rise of fast fashion retailers, discounters and online giants such as Amazon have created a perfect storm for one of the UK's best loved and most iconic brands. With M&S Chair Archie Norman stating that the business is embarking on 'probably the biggest turnaround in UK retail' as it aims to reduce costs by £350m over the next three years, you'd be forgiven for thinking that it will only be a matter of time before the retailer follows the route of House of Fraser and BHS.

But M&S is listening to consumers.

Over the past 6 months the brand has consistently sought to address concerns that it

has failed to innovate by significantly investing in ways to improve customer journeys. These investments have ranged from working with Twilio and Google to implement AI to deal more quickly with customer complaints and enable call centre staff to be moved to customer facing roles, to extending their partnership with Doodle to allow returns to be processed at its 280 Simply Food locations. In addition, the brand is also partnering with retail and investment firm True to access new innovations and start-ups that it can implement into its business operations. M&S is progressing rapidly with its plans to become a 'digital-first' retailer and safeguard its future.



## Bright smiles setting up a bright future

Placed beside toothbrushes for over a century, it's no wonder Colgate is the personal care brand consumers feel most connected to. The brand's 145-year history, drives associations of experience and expertise, instils trust and provides a familiar face in an increasingly crowded category.

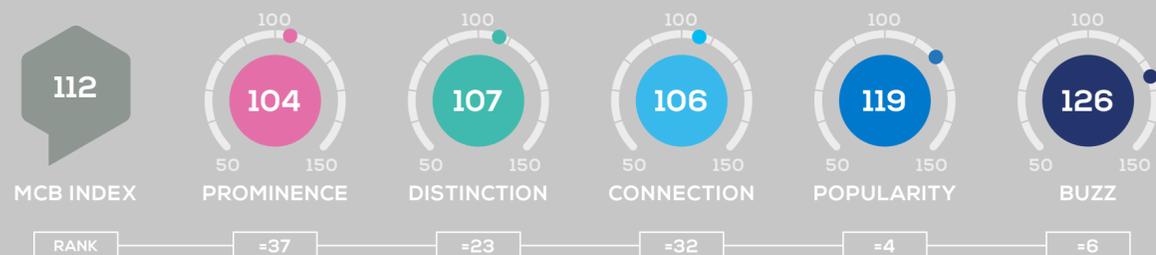
But Colgate hasn't stayed in the past, it has continued to innovate and create products that are both affordable and relevant to its global customer base, whilst maintaining unshakeable product quality that we have all come to know and love.

Professional endorsement is also a fundamental part of Colgate's success; sporting the tagline

"Number 1 recommended by dentists" for one of its key products, the toothpaste giant is top of mind for a product that will do what it says it does. It is this that enables the market leader to withstand the competition within a category that is notoriously fickle.

Colgate is also using its strong market position to provide its customers with guidance and advice on oral health through its oral care centre. In addition, they have partnered with dental professionals and local schools to implement their 'Bright Smiles Bright Futures' programme helping both to improve children's oral healthcare and, it might be argued, convert the next generation of customers.





## Charming the nation

From its cheap big-name brand alternatives to the simple store layout to the sales of ski poles and wetsuits, Aldi has well and truly charmed the nation.

Aldi descended on our shores in the wake of the 2007 financial crisis attracting penny pinching Brits looking for a bargain. Despite the economic downturn, sales at Aldi and Lidl (dare we mention their ever competitive and higher placed German counterpart) were soaring and even when the weight of British purses returned to pre-crash levels, our supermarket shopping habits did not. We were hooked. Fast forward to 2018 and Aldi's everyday low prices continue to delight the public and provide a constant battle for its competitors, unsurprisingly over-indexing on 'value for money' and 'great promotional offers'.

The strong popularity scores for the brand aren't only in relation to price, Aldi's efforts to showcase the origin and quality of their products has clearly resonated with British shoppers. The 'Meet the Supplier' campaign demonstrated German brand Aldi's dedication to championing Great British produce and making it available to us at reasonable prices, from 'farm to fork' as they like to put it.

As well as plans to open a considerable number of new stores nationwide, a key focus for 2019 is Aldi's commitment to become a completely carbon neutral supermarket. Significant investment in the use of solar panels, environmentally friendly refrigeration units as well as eradicating the use of unrecyclable black plastic packaging from supermarket shelves are some of the ways Aldi has begun to fulfil its environmental pledge.



FAIRY



## Long lasting brand love

Fairy's strengths as a brand rest on two core pillars: nostalgia and effectiveness.

A mainstay of British kitchens since 1950, it can rely on the strong emotional connection built up over that time, to the extent that the brand has become the genericised trademark for washing up liquid.

Fairy have leveraged this brilliantly over the years, with advertising famously highlighting the plight of children impatiently waiting for the bottle to be finished so that they could begin building whichever pencil case or toy rocket Blue Peter had shown them how to make that week. In 2011 they played on this nostalgia further, celebrating the anniversary of their original washing up liquid bottle by releasing a limited run of bottles with that classic design.

On our metrics, Fairy overperforms on emotional connection and prominence and is the only

cleaning brand to make the top 100 that isn't related to personal hygiene. Despite this, the brand holds its own on buzz, meaning that people are still talking about it and hearing about it.

But that reputation and longevity wouldn't exist if the product wasn't up to scratch and Fairy's other core strength is that it works. In 2013 brand owner Procter & Gamble doubled down on Fairy's "lasts longer" advertising after victory over Persil in a dispute with the Advertising Standards Authority.

In recent years the brand has taken pre-emptive action against the thing that threatens all legacy brands: the risk of being left behind. Like other P&G brands, Fairy has taken a lead in committing to making bottles from recycled plastic and recently committed to ending the use of phosphates in dishwasher tablets.

## Brand expert view – Fairy

# How Fairy can step up to the plate

It's been a while since this tune emanated from our TVs, but I can recall it instantly, such was its power. Incredibly, Fairy is now nearly 70 years old. As a child of the 80's, it was all about Nanette Newman and building space rockets from empty bottles. It was a brand that connected – for mothers with the former and kids with the latter. I remember mimicking the kid in the ad by not-so-patiently waiting for the bottle to run-out so I could create my own cosmos-conquering craft.

But how has it evolved? For what seemed like decades it hardly did – bar a slight change in the family make up; the odd beard /different skin tone appearing. But it was resolute in its messaging – kind

to your hands and lasts longer than others.

There was an odd moment 5 years ago when Sean Bean, a dinosaur and a bar fight appeared, to promote it's Make a Wish commitment. Of course, a brand must evolve – but this just seemed so left field. The trick with nostalgia brands is to keep what's special but bring them up to date.

Three years ago Fairy nearly did something brilliant. On International Women's Day they released content where they'd removed the 'y' and rebranded to Fair for the day. The idea was to tackle the division of domestic labour in the modern household. I say 'nearly' did something brilliant because for me it didn't go far enough. This is a brand that for getting on for

a century had placed women at the kitchen sink. Why not properly champion equality at home to show they'd also changed with the times? This could have set them up as a truly relevant – and connected – brand for that next decade.

Most recently they've gone back to basics with the infamous baby character now joined by 'tough baby',

a gravel voiced, hardnut that won't let that baked on food get away with it. It doesn't quite work for me.

I still use – and love – Fairy, but I think it could work harder to properly show

that it's got a rightful place in today's home. I love what Persil did with Dirt Is Good. They recognised and championed a shift in attitude to family life, and put it front and centre. I'd like to see Fairy do the same.

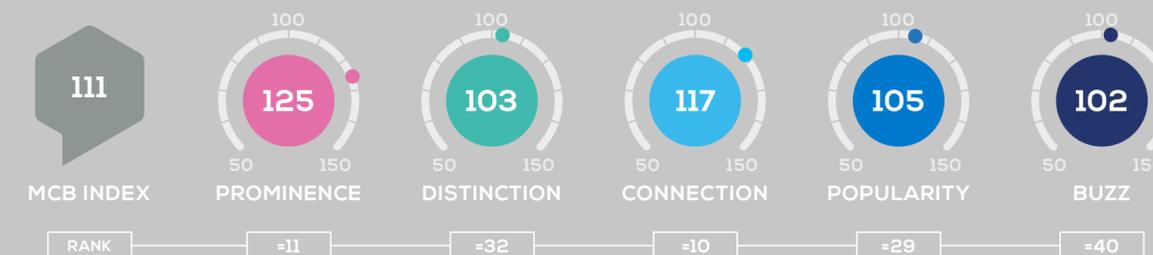
**“Hands that do dishes can feel soft as your face, with mild green Fairy Liquid.”**

**Nik Govier**

CEO and Founder, Blurred



**BOOTS**



## Embracing the feel good factor

Nearing 170 years old, Boots was created to offer affordable medicines to enable the poorest to help themselves. Fast forward to today and you will see the pharmacy standing strong on its medicinal foundations, but having flourished and bred an influx of beauty and wellness brands too. Home to over 2,000 brands, Boots are in brilliant danger of becoming a one-for-all having newly introduced a range of meal deals that now cater for vegans and flexitarians worldwide.

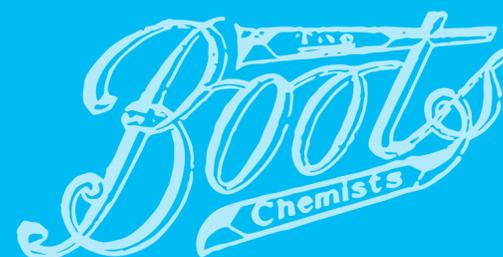
Unsurprisingly, Boots scores particularly highly on security, comfort and hope on our brand emotion metric singing true to their "feel-good" motto and ability to meet customer needs. Their latest "faceless" ad by Ogilvy effortlessly demonstrates this. It's all about championing the way you feel - the casts identities are purposefully not revealed until the end, cue voiceover "it's not just how it makes you look." The ad was perfectly echoed by an upbeat "feel

good" Mason track that's been featured in the UK Top Shazamed ads.

Helen Normoyle, marketing director of Boots UK and Ireland adds: "Our vision for this campaign was to show beauty at its best - as positive [and inclusive]. Working with a young female director, influencers, Boots colleagues and customers, we wanted our message of championing everyone's right to feel good to resonate with as many different people as possible."

With CSR in full flow, Boots UK have also smashed their carbon emissions target three years early by installing energy efficient LED lights and signed the UK Plastics Pact this year, operating as a socially responsible business. Yes it's about "lets feel good", but Boots are also staying fiercely true to their "do good" roots, and this integrity is getting them noticed.

## Brand expert view – Boots



### Still a pioneer?

Walking through Liverpool Street Station daily, I've witnessed the upgrade of a shabby but strategically important Boots the Chemist, into the new-look health and beauty model. It's been enlarged to accommodate a huge range of beauty, fragrance and prestige brands like: Liz Earle, NYX, Sally Hansen and Clinique.

Despite this transformation and what could be thought of as a rather late tapping into the big beauty zeitgeist, I wonder if I rate Boots as a brand?

Boots is an innovative UK heritage brand that we should be proud of. It's endured, responded to changing economic and social challenges and public health issues and consistently grown since 1849. Founder John Boot laid down its values and belief in

'affordable health', which it's delivered for nearly 200 years. Son Jesse and daughter-in-law Florence built on this, developing new health ranges and providing staff welfare. In 1911 they created the first welfare officer role, prioritising women workers. In 1913 they introduced free evening classes at their 127-acre Nottingham production facility.

Boots pioneered many health products and services we take for granted; the first 24-hr pharmacy in Piccadilly Circus in 1925; the first self-service stores in 1951; the invention of Ibuprofen in 1969; and now providing flu jabs for the NHS as well as aligning on government agendas on DIY health by offering eye, ear and dental care. And don't forget Meal Deals, Men's Grooming, Christmas Specials, mobile app and parcel pick-up services.

Boots own beauty brands No 7, 17 and Botanics are UK best sellers. Recent ads 'Summer like you're 7' and

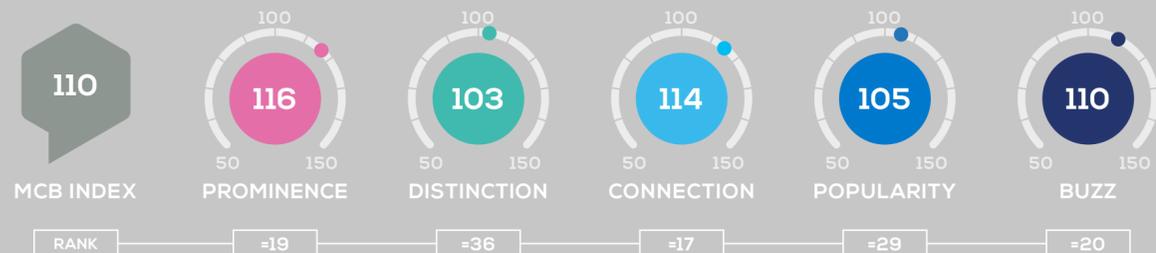
'Let's feel good' tap into the wellbeing vibe as well as a smart nod to diversity and inclusion. Boots is now seen as a 'retail navigator' offering informed and impartial advice and has one of the highest numbers of loyalty cardholders of any retailer.

So, as a serial innovator I was expecting Boots to use the upgrade to big-scale beauty offering as an opportunity to flex its pioneer spirit. I was hoping for new thinking in the retail beauty experience, championing diversity, sustainability and accessibility. Instead, it appears to be catching up to cash in, disappointingly providing another 'vanilla' experience. Brand relevance is the most important driver of customer loyalty and must be earned and constantly re-earned.

So, yes I'm a Boots brand fan, but I'm still waiting to be wowed by a thoughtful and new way of presenting beauty in retail.

**Brigid McMullen**

Managing Director, Workroom



## Fulfilling the needs of the nation

Starting out as a small store in Drury Lane 149 years ago, Sainsbury's now has over 1,000 stores UK wide. The second supermarket of the 'big four' behind Tesco, Sainsbury's is not only a brand that Brits feel familiar with, but one that fulfils the needs of the nation, according to our data.

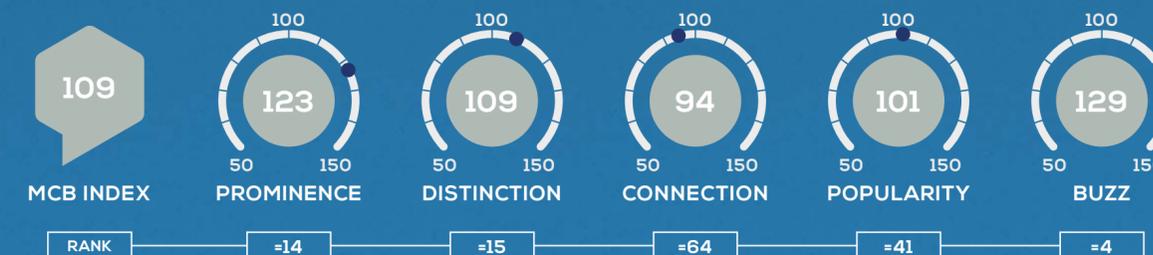
The supermarket also performs well for social responsibility, an unsurprising result when thinking about its long standing partnership with Comic Relief. Each year the sight of Sainsbury's staff wearing the famous red squeaky nose is not an unfamiliar one as they go above and beyond to raise money for the charity. Since 1999 the supermarket has raised over £100 million for Comic Relief and has become an essential influence in the campaign each year.

In 2018, Sainsbury's announced its merger with ASDA, which will mean the combined retailers will own a market share greater than the leading supermarket Tesco. Details of the merger are still yet to be finalised but plans do include the integration of Argos (whom Sainsbury's purchased in 2016) into ASDA stores. Everyday grocery prices are also set to be cut as a result of Walmart and Sainsbury's combined buying powers. Whether the union of the two supermarkets will pose a threat to the efficient operating model of discounters Aldi and Lidl is yet to be seen, but one thing's for sure, it's clearly in their sights.





FACEBOOK



## Defining how we see social media

As it enters its 14th year, Facebook appears to be experiencing the difficulties that often come with adolescence. The motto of “move fast and break things” works for a brash young start-up, but less well for one of the largest media companies in the world with over 2 billion users.

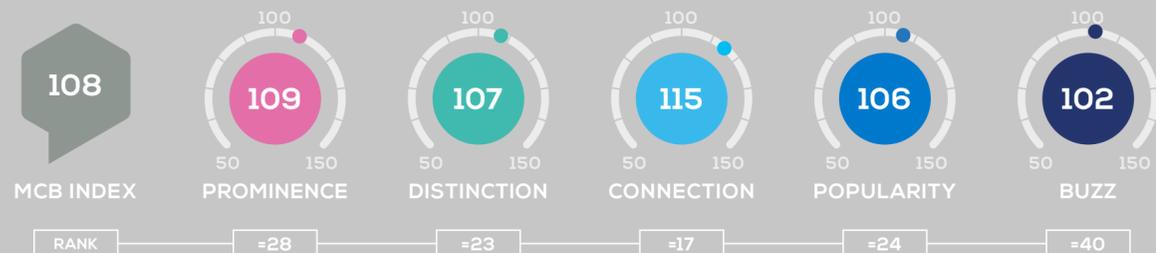
User growth in developed markets appears to be stalling amid a series of scandals and negative headlines. Nonetheless, when 91% of UK social media/messaging site users have a profile on the site, it will take a lot to dent its market position and central place in the social media lives of UK consumers.

Unlike other Silicon Valley firms, Facebook has always tried to wed itself more closely to the most intimate parts of its users lives, from their identity to their relationships and their beliefs. This has always been its key strength in attracting

and retaining users, as well as convincing advertisers to spend money on the platform by giving them ways to more effectively reach their target consumers. But this level of intimacy is also what makes it such a beacon for criticism.

While it may have initially been slow to react, the company has recently tried to respond with tact and humility, apologising for its failings and making firm commitments to improve the platform. It is shifting its focus away from mass communications for brands and publishers towards products focused on smaller-scale communities. Meanwhile, the popularity of its other properties, Instagram and WhatsApp, appears only to be growing.

The blows over the past twelve months have certainly not been mortal, and it would be foolish to bet against a company that has, more than any other, defined how we see social media.



## An always-on brand

From the Walkman to Blu-ray, Sony has had a position at the forefront of consumer electronics and in the heart of consumers' homes for nearly three decades. The power of the Japanese brand lies not only in pioneering new technologies, but in bringing new entertainment experiences to consumers, whether on the go or in their living room.

Sony remains most synonymous with its televisions and hugely successful PlayStation games consoles. But time and again, it has managed to transition its reputation for innovation and reliability into new product categories. And the company's influence in some of these areas – such as being one of the world's largest entertainment groups owning Sony Pictures and EMI – is perhaps under appreciated by consumers.

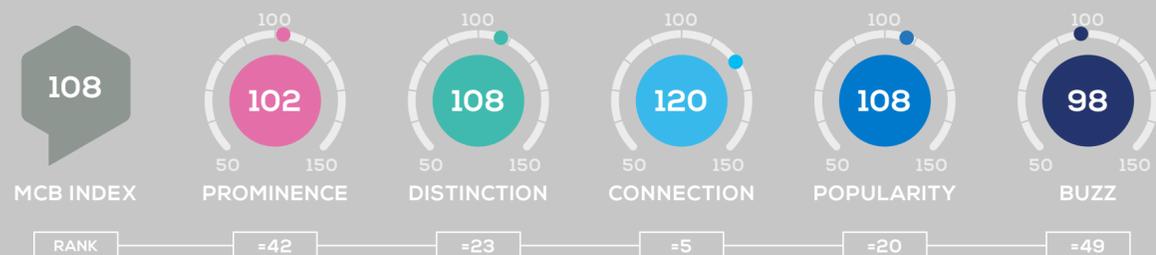
However, the brand's sprawling interests leaves it open to attack from all sides. As a manufacturer

it has struggled to compete with newer players such as Samsung and Huawei in some of the fastest growing technology markets of the past decade – most notably smartphones and computers. As an entertainment company, the advent of streaming and the recent spate of vertical and horizontal integrations among US entertainment could leave it exposed.

Meanwhile as a technology brand, it is difficult to overlook the threat of Silicon Valley giants such as Amazon and Google, both of which finished much higher in the Most Connected Brands Index. It's perhaps no surprise then that Sony's new chief executive, Kenichiro Yoshida, has spoken of "a strong sense of crisis" if the company fails to keep pace.

Nonetheless, it will take a lot to undo the trust and connection that Sony has built with consumers over decades, let alone to forget the experiences it has made possible.





## Balancing heritage with relevance

McVitie's is a story of a brand managing to balance nearly two centuries of heritage with the need to stay relevant and up-to-date.

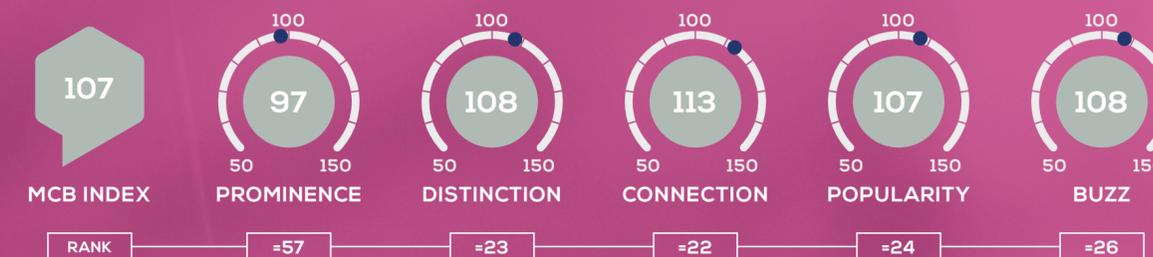
Like other legacy food brands they over index significantly on emotional connection, with similar scores to other staples of British kitchens and snack breaks such as Cadbury's, Heinz and Kellogg's. And similar to these brands, McVitie's reputation is also built on delivering the goods with strong scores for 'meets needs' and 'likelihood to recommend'.

To keep things fresh, the brand put significant effort into innovation, with the launch of Digestive Thins in 2017, and Moments in 2018 to capitalise on inspiration from café culture.

The brand's PR also works to leverage its centrality to British everyday life, focusing on owning the concept of biscuit etiquette and cementing the strong association between McVitie's and a relaxing cup of tea.

At a time when national culture trends towards nostalgia and hard times – the company recently had to announce they were shrinking some packages by 10g due to increases in ingredient costs – McVitie's are successfully balancing their emotional association with happiness and comfort with the risk of going stale.





### Clean to the core

Lever Brothers' Dove Beauty Bar hit the UK market in 1957. Launching a soap that rather than drying skin moisturised it, Dove quickly carved itself out a piece of the market, gaining popularity and consumer trust with their high quality and reliable products.

Since then Dove has gradually built its product catalogue, continuing to meet the evolving needs of consumers through its expansive product range and the introduction of personal care products for men in 2004. Now sold in over 80 countries, the Unilever-owned company is estimated to be worth \$4.1bn (£3bn), making it the 10th most valuable beauty brand in the world.

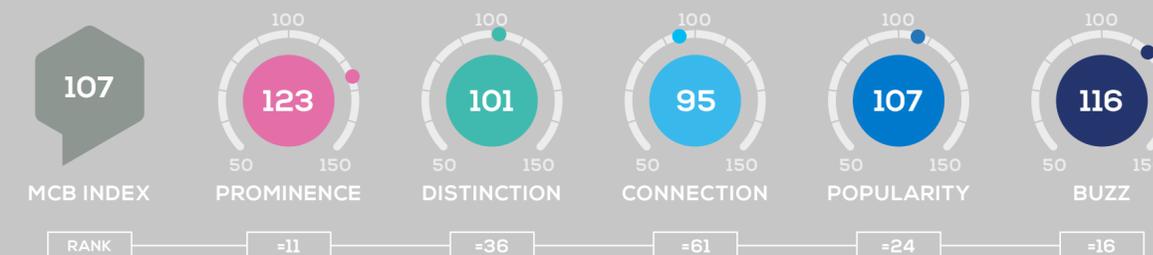
However, it was the launch of the "Real Beauty" campaign in 2004 when Dove really started to distinguish itself. The

campaign featuring six ordinary women in their underwear, was an early example of hashtag-heavy female advertising, a precursor to campaigns such as Pantene's #ShineStrong and #LikeAGirl from Always. Within a month, sales of Dove's firming cream had doubled.

Despite facing criticism in recent years for the introduction of 'real beauty bottles', Dove's commitment to widening the definition of beauty and increasing body confidence remains at the heart of their advertising campaigns and continued success. In the mind of its customers, Dove has established itself as a purpose-driven, socially responsible brand, evoking a strong emotional connection and values that they can relate to.



MCDONALD'S



## Happy Birthday Big Mac!

Golden arches.  
Blink.  
McDonald's.

The brand's in your brain faster than a Big Mac can hit your lips.

It's no wonder McDonald's scored so highly on our prominence metric. We process colour before words and shapes and McDonald's use of primary red and yellow is by no means a coincidence. Red for stimulation, appetite, yellow for happiness, friendliness (#happymeal) scoring highly on our 'brands that make you smile.'

The buzz around the brand gets pretty loud when you count over 10 different nicknames across the globe: "Maccies" (UK), "McD's" (Scotland), "Mickey D's" (US), "Maccas" (Australia), "Makku" (Japan), etc. – you get the picture. But perhaps McDonald's strength in familiarity is best showcased by their latest campaign "follow the arches." Although it's one of the most recognisable brands globally, billboards

are impressively different around the world. Canadian company Cossette created a new wayfinding system for customers using just the logo. They cropped the golden arches into directional paths that visually signaled instructions such as "on your right" / "next turn" directing customers to their nearest store. The brand purely relied on the nation knowing just a fraction of their logo to get to them – no explanation needed. This is about as good as it gets on the brand recognition scale.

McDonald's have announced that they will spend over USD\$6bn on the construction and modernisation of most of its restaurants by 2020. Whilst innovation has been pushed to the front of the agenda, they will need to keep their peripheral vision on customer satisfaction and offering great quality products to remain competitive. But if past results are anything to go by, this shouldn't be a problem – the legendary Big Mac is 50 this year.

## Brand expert view – McDonald's

# McDonald's Big Mac™ – Bringing the Big Mac to the Apple Mac generation

### The strategy

This year the McDonald's Big Mac turned 50. A burger brand loved by millions, the Big Mac is a firm favourite for Baby Boomers and Generation X but needs to work at creating connections with a younger audience.

For them, food choice has exploded in the last ten years with the rise of street food, Insta-bloggers and a 'hot' new cuisine every six months. And though they love their burgers, they are often drawn to hip new versions.

As the original gourmet burger, Big Mac is not their first choice. It's not new and doesn't have obvious Insta-appeal. Using the 50th Birthday as a hook, a campaign was created to introduce the notion that Big Mac love is forever love by:

- Driving excitement for two new limited-edition burgers – The Grand Big Mac and Mac Jnr
- Celebrating the heritage of the classic Big Mac

### The creative approach

"Two all-beef patties, special sauce, lettuce..." is the start of the recipe for Big Mac and also the tongue-twisting script for one of the all-time classic McDonald's adverts of the 70s.

To bring the tongue-twisting challenge to life for a new generation, McDonald's challenged rappers, reality stars, musicians and social media influencers to recite the mouth-watering lines in a series of Big Mac Battles. And to share their efforts with their millions of fans and followers.

This NOW-stalgia campaign was designed to trigger deep feelings of love and longing for Big Mac, taking it way beyond a food story and into mainstream coverage and social conversations.

The Big Mac Battles video and social content drove mass

reach whilst also hitting younger, niche audiences.

Balancing nostalgia with NOW-stalgia, the Big Mac Battles saw collaborations with:

- The UK's hottest reality TV stars to drive mass awareness amongst 16 –25 year olds (TOWIE's Joey Essex, Love Island's Chris Hughes, Made In Chelsea's Oliver Proudlock)
- Grime stars to reach young and cool audiences. (Lady Leshurr and Big Narstie)
- 80's pop-stars to hit a chord with older audiences to remind them of their first Big Mac. (Jason Donovan and Chesney Hawkes)

Content was amplified via Facebook, Twitter and Instagram, as well as via earned editorial.

### The result

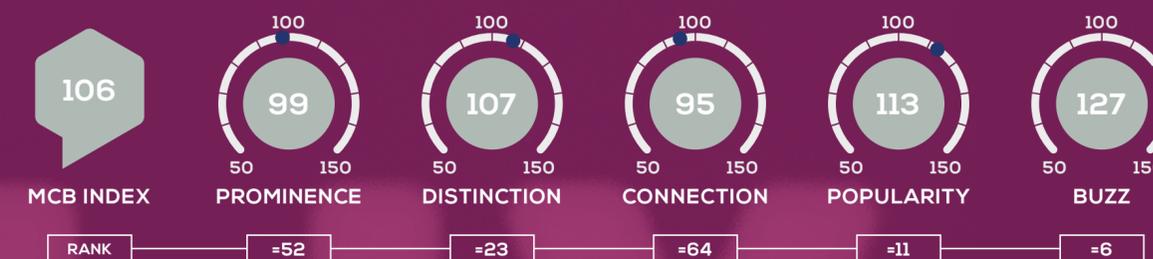
The campaign smashed its aim of driving excitement for the limited-edition burgers reaching 380 million people, generating 5.2 million views of video content, 3.8 million comments and 322,000 likes.

**Mike Morgan**  
CEO, Red Consultancy



NETFLIX

NETFLIX



### The content of our streams

For a company that was established a year before Google, you might say Netflix is a bit late to the party. However, now that it's arrived, it's clear that it's here to stay.

Netflix has over 50 million subscribers watching 100+ million hours of TV and movies a day, sorted into 70,000+ different categories. Since changing from a mail-order DVD company and investing fully in streaming, the company has become synonymous with watching TV in the same way 'to search' became 'to Google'.

Looking at the statistics about the streaming giants growth, it's no surprise that the brand is joint 5th in terms of buzz. It's also delivering on emotional connection, with strong associations of amusement and happiness. This is related to the intrinsic offering of entertainment and delivering this in spades with a considerable cornucopia of content.

Netflix is harnessing customer data, like it's Silicon Valley peers, to help understand what people are looking for and when. Advanced algorithms (such as the Netflix Quantum Theory) have been built to improve the service's recommendations and also identify white spaces for future content that they themselves can produce. Having had significant success with Netflix Original shows ranging from Orange Is the New Black to BoJack Horseman to Stranger Things to Making a Murderer, it's clearly working.

As for the future, the threat of Hollywood distributors looking to get a slice of the action and create their own streaming services do pose a challenge to Netflix's dominance. However, with the amount of data already collected on its users, Netflix is in a strong position to churn out their own content based on solid insight. So grab the popcorn: it's one to watch.

## Brand expert view – Netflix

# How Netflix is using data to drive connection and develop content

When considering the fundamental consumption shift in TV viewing (from a linear, “what’s on now?” model of old, to a “what do I want to watch, when?” model of today), there’s one dominant brand leading the charge: Netflix.

The figures behind the globalisation of the brand are staggering. In March this year, it was announced it intends to put USD\$8bn behind non-sports content – marginally more than Disney with USD\$7.8bn. In doing so, while initially a streaming platform, Netflix has become a studio in its own right – and with it, comes the brand allegiance that is driving the company to becoming one of the most valuable in the entertainment and technology sectors.

A large part of the success is down to its adoption of a far more targeted approach than previous

broadcasters knew possible, through innovative analysis of the vast volumes of data it holds on its customers. This has marked the business model out from the competition. Instead of predominantly investing heavily in a few stellar titles in the hope they offset costs (as others have done historically), Netflix commissions and acquires a long tail of cheaper content by knowing its audience better than any other streaming service. In doing so, it can micro-target programming (whilst simultaneously investing in high profile series and monetising these – the best of both worlds).

This targeting works by understanding which, say, 200,000 of its global millions of subscribers might like a specific programme and then pushing this as a recommendation on-screen. A high-percentage return from a smaller target base brings in better experience than a mass broadcast with a low, single-digit return.

Subsequently, the consumer experience is second to

none. The customer gets exactly what they want and by further exploring and watching new content, Netflix can continually refine its targeting. It’s a win-win.

Not only this, but in another fundamental shift from traditional programming, which relied on repeat viewer visits for advertising revenue (in the form of a multi-week, same-day, same-slot model), Netflix is dropping entire box sets on release. It understands the consumer appetite and, arguably, in responding to, it is helping to fuel the cycle of behavioural change in viewing habits. People don’t want to wait eight weeks now to watch a series – Generation Binge wants it all, and they want it now. We’ve turned into a TV equivalent of Veruca Salt and Netflix understands this.

Combining smart use of technology and a customer-first approach to scheduling, Netflix has not only changed the rules in terms of viewing behaviour, but is beginning to break the stranglehold of the major studios.

**Chris Owen**

Director, M&C Saatchi PR



**BIRDS EYE**



## The tea time favourite bounces back

It is perhaps surprising to see Birds Eye so high on the list of top brands. But the brand undoubtedly has both a special place in our hearts, as well as products in every freezer in the UK. With a history spanning nearly 100 years and seminal advertising campaigns under its belt, much of the prominence and emotional connection is driven by nostalgia.

Birds Eye enjoys a warm emotional glow, offering both comfort and a sense of belonging.

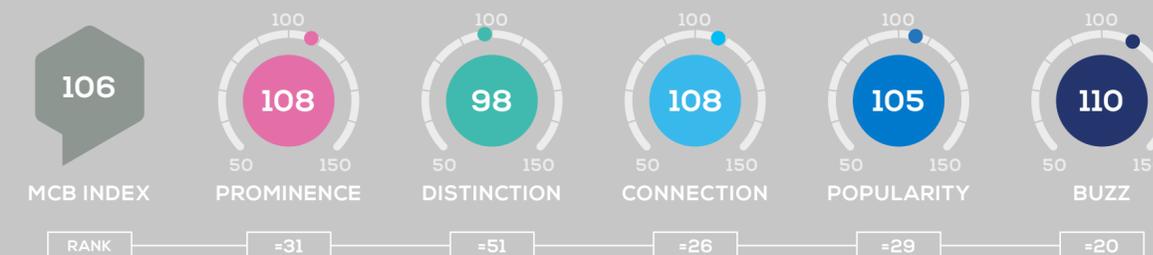
However, recent marketing strategy also looks to be having a significant impact. After 3 years of constant decline, in 2017 the brand switched from a Masterbrand strategy to marquee product campaigns. This coupled with the comeback of the iconic Captain BirdsEye transformed the fortunes of the company.

Mobile first digital campaigns targeting busy mums helped to counter concerns surrounding the quality of Birds Eye products, whilst advertising on Snapchat and Facebook helped target a new younger consumer group and achieve the aim of reactivating affection for Birds Eye.

Whilst the brand was forged by innovation, with Clarence Birdseye patenting Quick Freezing, the belief it doesn't push boundaries remains its core weakness. Focussing on new product categories and predicting consumer trends will help the brand to support its strengths in popularity, meeting needs and advocacy with a sense they are reflecting the changing wants of the UK consumer.



MORRISONS



## Playing left field to stay in the game

Traditionally the smallest of the 'big four' UK supermarket chains, Morrisons has struggled through numerous changes of leadership since its acquisition of Safeway in 2004. Morrisons was later than its bigger rivals to move into online shopping and its attempt to mirror the success of Tesco Express and Sainsbury's Local petered out in 2015 with the sale of all "M Local" stores to "My Local", which later entered administration.

Morrisons therefore sits in an ambiguous position; reliable, but perhaps less cutting edge than its rivals. The brand underperforms compared to Tesco, Asda and Sainsbury's on 'sets trends' and 'new and different', but holds its own on meeting customer needs, value for money and social responsibility.

In recent months Morrisons have made a number of under the radar innovations, which capitalise on its strengths, such as bringing in

'quiet hour' on Saturday mornings to help autistic shoppers who struggle with too much music and noise, and strengthening its environmentally friendly policies, such as no longer plastic-wrapping cucumbers and introducing 'wonky veg' boxes.

More significantly, Morrisons has attempted to steal back some of the head start its larger rivals had in the online shopping space by opening up fresh, chilled and frozen food to Amazon to order via its Prime Now and Pantry services.

The question is whether these changes are enough for the chain to retain its position; Aldi has been biting at the heels of the big four when it comes to market share and the gap between fourth place and fifth is closer than it has been for years.

Morrisons, however, is fighting back.



## Smoothing a way to the future

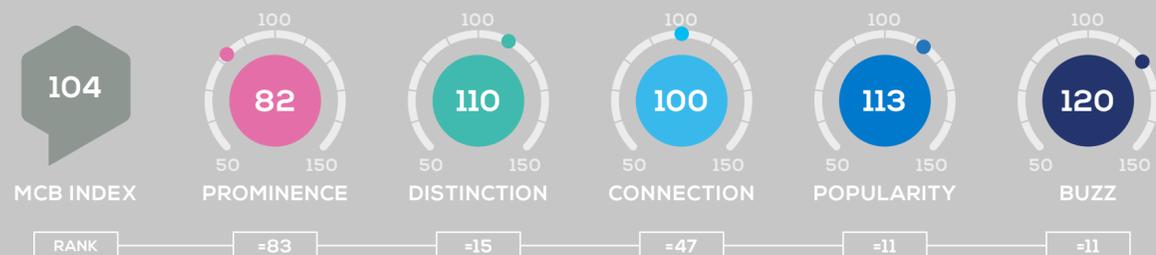
Not far behind Dove in the list is the German brand Nivea – the second highest ranked personal care and cosmetics brand in our index.

While the brand may not be topping the list of trending topics on Twitter or Instagram, Nivea has established a solid following of committed customers after deciding to streamline its portfolio to concentrate on select, consumer-focused products in the late 1990s. Successful partnerships with Liverpool FC and French team Paris Saint-Germain have also driven the resurgence of the Nivea Men sub-brand – an approach the company are currently attempting to replicate with their sponsorship of The Voice

UK. The brand is working alongside beauty bloggers and hair and make-up artists to offer tips on how to recreate some of the beauty looks from the talent show in an attempt to pique the interest of younger women and drive top of mind awareness amongst this group.

Despite 130 years of experience in the skincare industry, the brand is keen to innovate, developing offerings based on consumer concerns around the effects of pollution and the urban / inner city environment. This brand clearly knows that relying on prominence alone will only go so far.





## Keeping consumers connected

The rise of WhatsApp marked a transition in communication from large-scale broadcast social media, primarily on desktop, towards mobile-first peer-to-peer messaging.

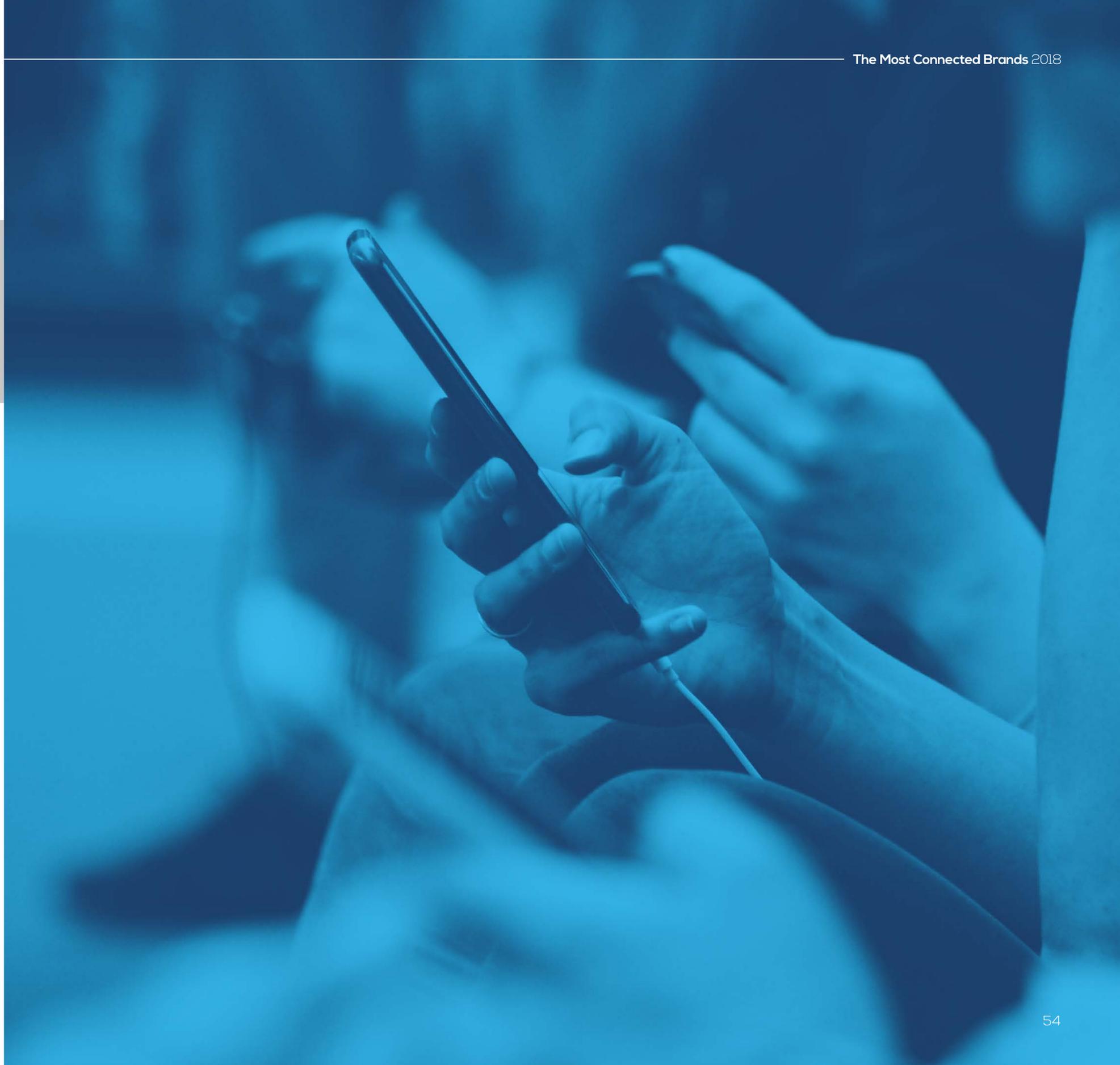
The brand's initial appeal lay in its ultra-simple interface and promise of end-to-end encryption for all messages. However, with many users part of sprawling groups, multimedia functionality and increased opportunities for brands, the WhatsApp ecosystem has grown markedly since it was acquired by Facebook in 2014.

And this could be just the beginning. If WhatsApp looks to emulate the success of WeChat in China, we could soon see it offering functionality that turns it from a messaging app to a payment platform, digital passport, and customer service portal rolled into one. Its parent company Facebook has already taken steps to integrate it

more closely, providing greater opportunities for advertisers looking to target younger age groups who are less keen on the social network.

This expansion, far beyond its core purpose, has already caused ructions within the company, as demonstrated by the resignation of its CEO and co-founder Jan Koum in April over disagreements with Facebook over privacy and encryption. Retaining the simplicity and security that made WhatsApp successful, while expanding functionality and monetising users will be a tricky balancing act over the coming twelve months and beyond.

Yet, for millions of UK consumers, WhatsApp is still trusted to be the platform for their most intimate connections with friends and family, here and around the world.



## Brand expert view – WhatsApp

# Facebook's sleeping giant

For an app that has 1.5bn monthly active users, WhatsApp gets surprisingly little press. It's the not so secret (end-to-end encrypted) app that has taken the world by storm, and it's done it almost entirely through word of mouth. More brands need to look at how WhatsApp became so dominant, and even if they can't replicate the circumstances for its success, need to consider how they can better use it's massive reach to connect with their customers given that it is one of the most under-used communication platforms.

One of the keys to WhatsApp's initial success was its simplicity and its utility. At its core, WhatsApp is a text message (now voice and video calling) replacement that helpfully skirts around international borders and associated long distance fees. Users only need a mobile number and a data plan (or access to WiFi) and suddenly they can contact the world for free. Removing a fee that every consumer hated provided people with an incredible amount of utility and created a powerful network effect as it compelled people to tell their friends to get their own account so they could chat with one

another (and save money in the process). This supercharged word of mouth captured an incredible number of users outpacing Skype, Twitter, Gmail, and even Facebook in its first four-year growth curve.

Creating a powerful network effect has been a key marketing strategy for many tech platforms, but while most try to outpace each other with new gimmicks and games, WhatsApp has quietly focused on keeping its user experience clean and quick. That doesn't mean it hasn't kept up with the latest developments in the way people communicate; 450 million people use WhatsApp Stories daily (compared to 300 million on Instagram and 150 million on Facebook), but WhatsApp has only added functionality that helps build on its core competency of helping people communicate more easily.

WhatsApp has also benefited from the growing trend of consumers not wanting to share every (unfiltered) moment of their lives with the world. People have become increasingly aware, and often stressed out, by their public online presence, which has led to a growing amount of people creating smaller networks of close friends for sharing their 'off-the-cuff' photos, moments, and thoughts. It was this desire for the ephemeral that powered the rise of Snapchat (and its many copycats).

With its massive scale and the large amount of time spent in app, it seems strange that so few brands are active on the platform as the opportunity to connect with consumers is enormous. One of the main reasons is that unlike Facebook Messenger, brands can't actively advertise on the platform. This means brands need to get far more creative in justifying their existence on the platform, as they need to provide consumers with a specific utility or service for them to engage. While this may require a higher investment level from brands, this should be offset through the benefit of building stronger ties with their most active customers and helps future proof their key messages from 'newsfeed blindness' that will likely happen – as is evidenced from the drop in effectiveness of display advertising.

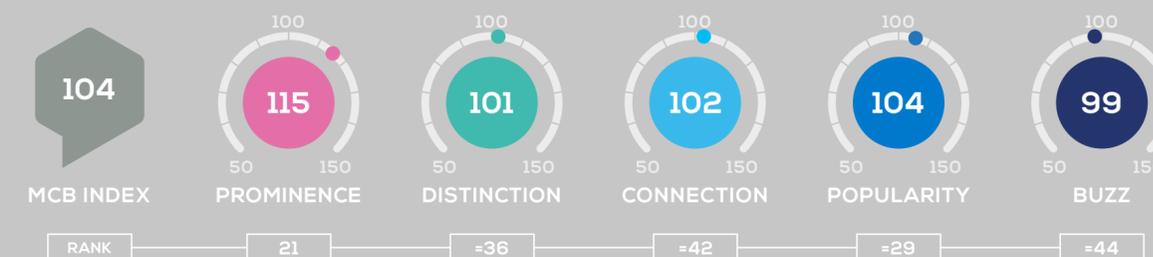
While part of WhatsApp initial success was due to the fact that they were the right place at the right time, WhatsApp has flourished because they have an incredibly useful offering and have continued to engage users by focusing on what users want most, better and easier ways to communicate with one another. It is this same desire to communicate that brands need to start tapping into if they want to stay relevant and future proof their messaging for their most active and loyal customers.

**Chris Walts**

Social Strategy Director, Ogilvy



ADIDAS



## Staying on trend

An iconic logo and being one half of the dominating duopoly of sportswear has landed Adidas safely within the top 50 Most Connected Brands in the UK. Not bad for a company that acquired its signature logo for around €1,600 (plus two bottles of whiskey) and began life making spiked running shoes for athletics.

Beating it's long-time rival Nike by 10 spots, Adidas has diversified from competitive sports clothing and accessories to casualwear and fashion. Collaborations are a significant part of the Adidas arsenal, with the critically acclaimed "Adidas by Stella McCartney", now in it's 14th year and Kanye West's creation of Yeezys leading to his own fashion line.

The constant evolution of it's product portfolio resonates with consumer attitudes, who see the brand as always looking to push boundaries. It is unsurprising then that Adidas is investing in promoting its ethical credentials and sustainability; arguably the most dominating trend within the fashion industry currently. The new coral coloured Real Madrid kit from Adidas, for example, is made from plastic sourced from the oceans, and they have created a line of sportswear made out of up-cycled plastic waste in collaboration with Parley.

Adidas will hope that by acting fast on increasingly mainstream and important trends, it can continue to connect with consumers and stay ahead of it's long time rival Nike.



IKEA



## The sustainable, everyday

Founded in July 1943 by Ingvar Kamprad on the outskirts of Älmhult, Sweden, IKEA has grown from a small mail order business run by an enterprising teenager on a bike into the world's largest furniture company.

As the organisation celebrates its 75th birthday, the retailer's winning combination of affordable, well-designed furniture and Swedish meatballs shows no sign of wavering. Posting sales of over USD\$44.43bn from 400 plus megastores across 49 markets last year, the company's focus on sustainable practices and challenging convention continues

to be recognised and rewarded by consumers.

With radical plans afoot to disrupt the industry by renting, not selling furniture, IKEA's longevity is assured by their emphasis on flexibility, rather than permanence. From the creation of a polyester carpet designed to be hired, returned and recycled by the manufacturer; to the trial of sofa buy-back schemes in Japan, the company continues to thrive by recognising the impact their business has on the environment, the importance of creativity and the power to continually reimagine 'the wonderful everyday'.

## Brand expert view – IKEA

# How IKEA discovered an enduring brand purpose

Today IKEA are one of the world's most consumer-centric brands, but this hasn't come without hurdles and as they have said themselves, their best ideas have come as a result of challenges. For example, after the recession they conducted surveys that revealed they meant too little to consumers and that they were perceived as mostly a source for durability and storage – so it was obvious they needed to do something different.

One example of how they changed was their Wonderful Everyday campaign – the aim of which was to appeal emotionally to their customers by demonstrating their role in their homes. This gave IKEA a new and enduring brand purpose 'To create a better everyday life for the many people'.

With a clear mission to simply improve their customer's

everyday lives, today IKEA make thousands of visits to customer homes, to establish how they can make customer lives easier. This means they can establish what customers in different markets need and make their stores more local and personalised.

They also use these insights into consumer relationships with their homes to focus their campaigns around people's needs. Their campaigns emphasise how they have become part of their customers lives, in both big and small moments.

According to UK and Ireland Country Marketing Manager Laurent Tiersen, IKEA wants the brand to be much more than just about price. They define value as not just about offering low prices but showing how IKEA can make customers feel better and improve their lifestyles. They want to create solutions which make life easier.

One way they have achieved this is by creating a customer-segment-specific solutions based on lifestyle and location, with stores reflecting the lifestyles of the

location that they serve. For example, in recent years IKEA has stepped up its strategy for accommodating small living spaces in cities, which appeals to millennials. Their recent 'Ghosts' advert emphasised the importance of home reflecting customer personalities, and one way people can do this in a small space is by choosing colourful fabrics.

They have also created an efficient brand asset management system, which allows all their employees to understand how the brand should be deployed on a global and local level. This is especially important as stores are tailored to locations and customer segments. Connecting everyone inside the organisation with the brand, makes connecting customers with the brand so much easier.

Perhaps this is just the beginning of IKEA's stronger connection with their customers. Like Ingvar Kamprad (Founder of IKEA) said, "Most things still remain to be done. A glorious future!"

**Jo Davies**

Managing Director, VIM Group



MASTERCARD



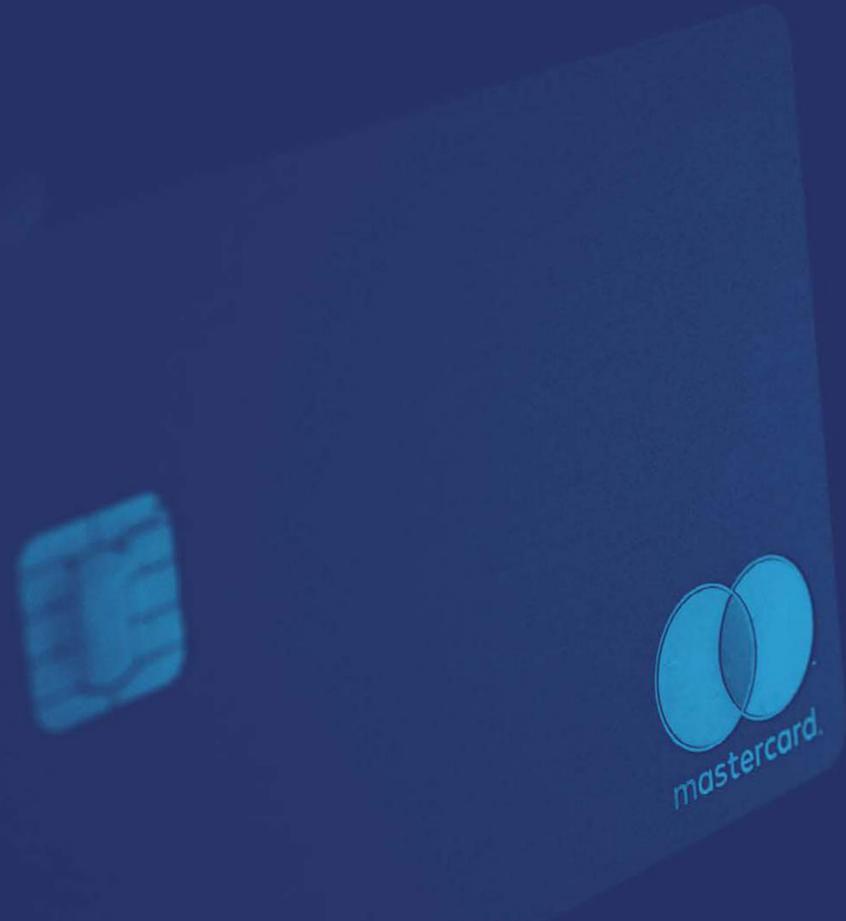
## Capitalising on a cashless society

It is perhaps unsurprising that a payments company has achieved a top 50 position. More associated with the 'tech' rather than the 'fin', Mastercard has managed to establish itself as an innovative, forward thinking, customer driven brand.

The success of the iconic 'Priceless' campaign, which has spanned two decades now, is testament to the brand's future-focused creative strategy. At the time, shifting emphasis from the tangible to the experiences money

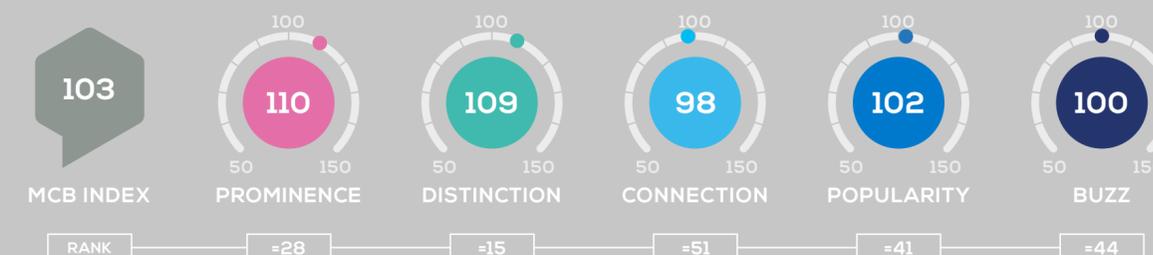
cannot buy was bold and contrarian for the category, but it was a move that would pay off with a message that is as relevant today as it was then.

With the likes of Google, Apple and Amazon increasingly dipping their toes into financial services, Mastercard faces new challenges, but its foot is firmly in the door, as it now looks to invest in virtual reality and biometric technology to deliver a customer experience that money really CAN buy.





DISNEY



## All hail The House of Mouse

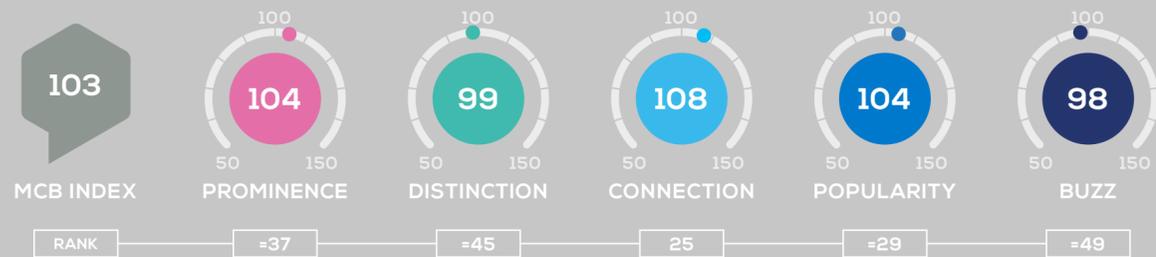
The chart of Disney's share price since 2000 resembles a terrifyingly steep mountain, but much of Disney's success in the last 10 years has been hidden behind other, more prominent brands. The acquisition of Marvel Entertainment in 2009 and Lucas film in 2012 added a suite of intellectual properties and franchises to Disney's portfolio that they have been consistently turning into billion-dollar blockbusters ever since.

A look at the highest grossing films of the last few years highlights the degree to which Disney dominates with its combination of Star Wars and Marvel. The House of Mouse is consistently behind four to five of the top 10 films in any given year since 2015 and in 2016 the top 5 films by worldwide box office gross were all distributed by Disney.

The just-approved acquisition of 21st Century Fox, currently on track for completion in early

2019, will place even more media content, intellectual property and popular culture icons under Disney's control. Rumours of Disney starting its own streaming service are certainly keeping Netflix up at night as any Disney supported service would begin life as a market leader with exclusive rights to a staggering proportion of TV and film franchises.

This behind the scenes success helps explain why Disney, on the strength of its own brand, almost didn't make the cut. The brand underperforms on emotional connection despite playing a role in the fond childhood memories of millions of people and below expectations on 'buzz' – measures that would no doubt be significantly higher if combined with their more prominent sub-brands.



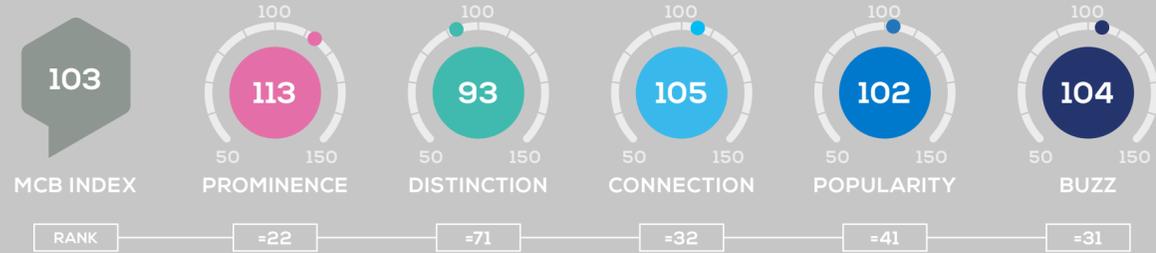
## The giant of the FMCG world

With over 2,000 brands across 150 countries, Nestlé is a giant of a brand and the largest food company in the world. It does this whilst also being one of the largest operating within a number of other categories such as Healthcare and Nutrition, Petcare and Cosmetics.

It's no surprise that the brand is one of the most familiar to UK consumers; we're creatures of habit and our relationship with Nestlé essentially reflects this. Whether it's a box of Cheerios or a packet of fruit pastilles, Nestlé owned brands continue to dominate our weekly shopping baskets. Whilst the brand is not seen as one of the most innovative or cutting edge, it's undoubtedly a strong contender on supermarket shelves. Consumers trust that Nestlé products will do what they say on the tin (or packet).

Never one to be left behind, Nestlé continues to adapt to the changing expectations of consumers, regularly transitioning into new areas and increasing its market share through clever acquisitions and shrewd alliances. One such alliance is Starbucks. Nestlé recently paid in excess of £5bn to start selling the company's coffee products – its fourth coffee acquisition in less than two years. Already a major player in instant coffee, the brand continues to capitalise on the growing coffee culture amongst millennials and tap into the premium coffee market through their fast emerging Nespresso Cafés. All of which begs the question: is there anything this giant can't do?





## Changing times for the supermarket stalwart

Pocket tapping its way into the top 50 brands is Asda, the third of the 'big four' supermarkets. Renowned for its cheap and cheerful prices, the retailer rates extremely well for 'great promotional offers', but faces tough competition from European discounters Aldi and Lidl. However, just like Morrisons, the supermarket faces tough competition from European discounters Aldi and Lidl.

It is the threat of these supermarkets and their somewhat unbeatable pricing strategy that has meant slow growth for Asda in recent years. In 2018, Sainsbury's announced they would be merging with Walmart owned Asda, a move that is set to benefit both parties as they become, in partnership, the majority market shareholders in the grocery sector overtaking Tesco.

Whilst the profitability of their grocery arm may have been under strain, their clothing line

certainly isn't. Asda was the first supermarket in the UK to launch its own fashion range, George, which is now the second biggest clothing retailer in the UK by volume, also featuring in our top 100 brands independently. Whilst Sainsbury's own line, Tu will be kept separate from George, the merge will mean a 5.6% share of the UK clothing market (George 3.5% and Tu 2.1%), a real threat to value retailers everywhere.

Difference and the ability to set trends are factors that may not currently be associated with Asda, but it remains a brand many say they couldn't live without. Maintaining this connection with customers will be key for the brand as it attempts not only to de-throne the discounting giants Aldi and Lidl, but in their efforts to protect the brand image under the Sainsbury's umbrella.





## Being less 'mum' and more 'everyone'

Where's mum gone? Oh, of course, just nipped into Iceland for a frozen ostrich burger and asparagus spears.

More premium products, a vegan range and some smart advertising has seen falling sales and profits at Iceland reverse and it named the UK's best supermarket. This is despite stiff competition from Aldi and Lidl who dominate the discount end of the supermarket spectrum.

Its strategy of being less 'mum' and more 'everyone' has paid off but nowhere has competition as fierce as in the supermarket world. Whether it's from the larger stores or the challengers, Iceland faces a potential battle

to remain one of the UK's favourite brands. It continually needs to reinforce its USP. Best known for being value for money, it doesn't have the distinctiveness or buzz of Aldi and Lidl.

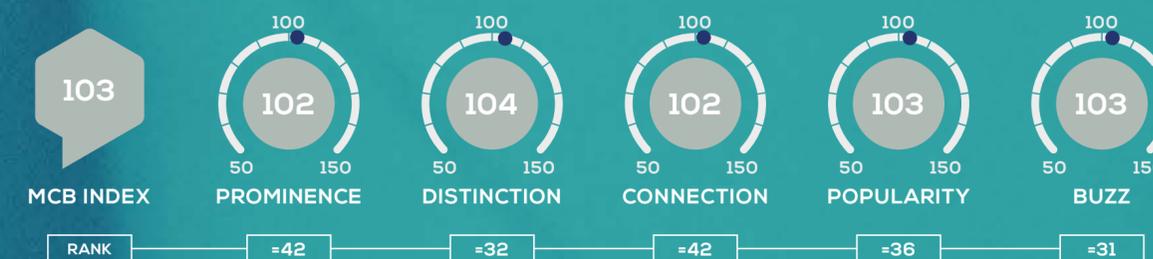
Yet as Iceland continues to think differently, reiterating it's commitment to reducing food waste and introducing new sustainability policies such as a pledge to remove all plastic packaging from all own label products by 2023, the brand is attracting a new following of eco-conscious millennials. The future, looks bright and environmentally friendly, for this forward looking retailer.

What's on the menu this evening then dad?





GILLETTE



## The need to stay razor sharp

For over a century, Gillette has been providing the innovation to keep men looking and feeling their best.

Its classic 'ecosystem' sales model – ensuring repeat purchase of high mark-up razor blades by offering reasonably-priced razor handles – has served it well. Meanwhile, its relentless focus on bringing new razor innovations to market, combined with the ongoing endorsement of some of the world's biggest sports stars, has led to a period of unparalleled dominance on supermarket shelves.

But the male grooming market has shifted massively over the past decade. The rise of challenger subscription razor brands, such as Harry's, Dollar Shave Club and King of Shaves, has forced the hand of Procter & Gamble. In the US it has issued an apology to customers and cut prices in response. It could well replicate this move in the UK.

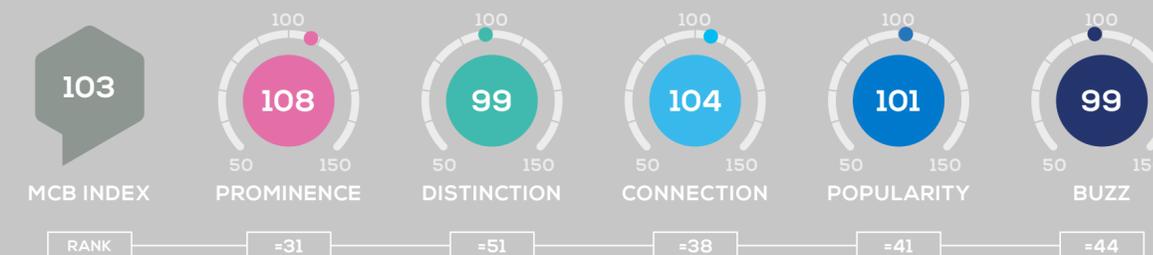
Male grooming habits are also changing and the growth in popularity of beard and stubble naturally spells trouble for a razor brand. The rise of Nivea for Men and Dove Men+Care above traditionally dominant 'macho' brands is further evidence of changing tastes. Meanwhile, sports stars are no longer the sure-fire bets they once were. Younger men now look as much to male grooming and fashion influencers on social media.

Gillette is already adapting to these challenges, and the rise of male body shaving looks set to become a growth area for the brand. Taking its cue from female razors, the company has already launched specially-adapted razors in a number of markets and the UK will surely be next.

While Gillette is still focused on being 'the best a man can get', the next step in its evolution will be led by an understanding that 'the best' is rapidly changing.



NESCAFÉ



## Riding the coffee addiction

Nescafé has been providing coffee to households for 80 years. Launched in 1938 after eight years of development, the notion of instant coffee as we now know it, was born. Since then Nescafé has become the world's leading coffee brand. Available in over 180 countries, a staggering 5,500 cups are consumed every second, making it the go-to coffee staple for families up and down the country.

Over the last decade, however, UK coffee culture has experienced a dramatic shift. A nation of tea drinkers has given way to a country of coffee addicts. The growth in coffee as an experience, with speciality products, High Street brands such

as Starbucks and Costa, as well as chic artisan coffee bars, has increased competition and informed expectations for at home drinkers who want 'real' coffee, not 'instant'.

Nescafé's response to this challenge has been evident. The launch of the Azera range in 2013 focused heavily on its premium qualities with its 'Be Your Own Barista' campaign and the range has expanded ever since. By focussing on new product categories and staying on top of consumer trends, Nescafé has managed to stay relevant and popular, continuing to meet the ever changing and discerning needs of its customers.

## Brand expert view – Nescafé

# Nescafé Original: Personalities campaign spring 2018

### Background

In spring 2018, Nescafé Original, the UK's favourite coffee, launched a multi-channel integrated seasonal campaign making light of the nation's different morning personality types.

### The strategy

Using consumer conversations and research, the Nescafé team identified 6 different morning traits that many people will instantly recognise in either themselves, their friends or their colleagues.

- **The A.M. Athlete** – You know the ones. Gym? Already completed it. The only just-dessert you get is when you find out their fitness watch malfunctioned the same morning they manage their all-time 5k record. Unlucky!

- **The Early Hours Snoozer** – Getting out of the wrong side of bed is an impossibility for The Early Hours Snoozer. That's because after snoozing their alarm for the 16th time, their partner eventually pushes them out of it.
- **The Sunrise Chatterbox** – This person has such an unnaturally large number of topics for this time of day that they'd probably be better off running their own TV talk show.
- **The Morning Zombie** – 'Human' won't be this person's first language until at least noon.
- **The Pre-Noon Grouch** – Do them a favour and don't go asking for any favours. Even though they're yet to blossom into an upbeat butterfly of an afternoon person, morning really isn't their thing.
- **The Morning Rusher** – The key left in the door, the toothpaste cap left off, the tap left on. All symptomatic of the Morning Rusher.

### The creative approach

Each of the morning personality types were brought to life to be celebrated on UK television every morning with

a Channel 4 Breakfast spot, which ran until September. The humorous films, made especially for the campaign, ran between advert breaks on all Channel 4 Breakfast programming.

In June and July, a partnership with BuzzFeed UK explored the UK's morning personalities further with irreverent debates and a humorous quiz which determined what type of morning personality each reader is.

On Twitter the cheeky campaign and quiz was signposted to a UK audience, encouraging users to share their own morning personality with friends and family.

In store, a series of 6 limited edition Nescafé Original jars, each one featuring a morning personality hit the shelves and 116 Tesco stores across the UK hosted Nescafé Original experiential days, with tasting celebrating the morning personalities and giving away free personality branded coffee mugs.

### The result

As well as raising awareness of the brand, the campaign helped to provoke fun conversations in the office kitchen, cheeky nudges at friends and family online, and helped make mornings a bit more fun.

**Aline Dezileau**

Brand Manager, Nescafé Original



# JOHN LEWIS & PARTNERS



## Using values to underpin the brand

There are few brands whose Christmas advert campaigns warrant their own Wikipedia page, and fewer still which describe their release as 'one of the signals that the countdown to Christmas has begun in the UK'. But then again, John Lewis & Partners is no ordinary brand. The public's response to the Christmas campaigns is reflective not only of their response to the creative, but the strength of their emotional connection to the retailer.

When John Lewis began trading in 1864 on London's Oxford Street it is unlikely that he could have envisaged the company it is today. But his combination of commercial acumen and corporate conscience then, so ahead of its

time, created an organisation which continues to be recognised by consumers as upholding values to which they can relate. All 85,500 permanent staff members are Partners who are governed by a constitution that sets out their responsibilities to one another, to those with whom they do business, and the wider community.

At a time of profound uncertainty for High Street retailers, this notion of putting people before profits may seem unfathomable. But for John Lewis & Partners, it is a principle which is central to not only the organisation's ethos, but also to the brand and its now refreshed identity.

## Brand expert view – John Lewis & Partners

# What brands can learn from John Lewis & Partners value driven approach

'Brand fan' is one of today's more enduring marketing buzz words, but very few brands actually achieve a critical mass of 'fans' – people who will recommend the brand enthusiastically and unequivocally. John Lewis & Partners is one of those brands. Time and time again the company figures at or near the top of brand league tables. And, moreover, it has achieved this elevated position amongst the discerning and cynical British middle classes.

But this year John Lewis has had a hiccup; in the summer the company revealed it would only make a negligible profit and the Partner's bonus would be trimmed again. Indeed a few Waitrose stores (the John Lewis food brand) are being closed.

Yet in the wider context of the British High Street,

John Lewis is actually holding up very well. Other retailers (and weaker brands) such as House of Fraser, Mothercare, Maplin, BHS and Toys "R" Us have been in much greater trouble; some are no longer with us.

**John Lewis has garnered loyalty over the years because of its much lauded strategy of offering excellent service, price matching and quality products.**

The strategy is supported by highly-motivated staff, each of whom is a Partner in (and therefore part owner of) the firm. John Lewis has also been relatively successful in encouraging consumers to make online purchases.

And unlike many of the High Street's 'basket cases', the company is fighting back. **Leadership realises that the future of High Street retail lies in focussing on experiences that can't be replicated online.** So

John Lewis is introducing personal shoppers (20% of the brand's womenswear sales in the Westfield store are through personal shoppers), themed events, concierge services and evening classes. And the brand is being stretched into other services such as plumbing, electrical wiring and other trades.

Charlie Mayfield, Chairman of the company, sums up the future strategy as follows: "Our plans put differentiation, innovation and partner led service at the heart of our offer (rather than scale)".

The company is also redesigning stores, refreshing its visual identity and amending the name to 'John Lewis & Partners' to signal the unique ownership structure and deep involvement of employees in the company.

There are many fans hoping the strategy succeeds and that John Lewis remains a brand they can buy from.

**Adrian Day**  
Consultant



## Putting people before profits

A global icon, Nike has a strong heritage of innovation. Co-founder Bowerman began the company by trying out kangaroo leather, velvet and deer hide as materials, and used a waffle maker to make the classic criss-cross design we see on all modern trainers. Fast forward to 2016, and Nike released a real-life version of the self lacing Nike high-tops worn by Marty McFly in Back to the Future II. Their onus to innovate is to keep ahead of Adidas for dominance of the sportswear market and it doesn't look as if they will stop any time soon.

Interestingly, growth areas identified by the brand focus on the creation of innovation and digital platforms. By investing in ways to provide tailored products and services based on consumers' individual preferences and buying

patterns, the brand hopes they will be able to boost sales and loyalty.

Similarly to Adidas, Nike is beginning to respond to and capitalise on ethical capitalism hitting mainstream society. Having been hit by multiple allegations pertaining to its use of labour across its supply chain, the brand has been making a concerted effort to appear more wholesome.

Their ethical centred marketing and creation of products out of re-cycled plastic seems to be having the desired effect, with many UK consumers seeing it as a brand that puts people before profits. However, with transparency and accountability ever important in consumers' minds, Nike can't just talk the talk, but has to Just Do It and also walk the walk.



## Brand expert view – Nike

# Consumers want brands to believe in something, even if it means sacrificing everything

One of the most striking findings from the latest wave of our Business Reputation Monitor, run in partnership with The CBI & Porter Novelli, is that 92% of consumers expect businesses to speak out on key social issues.

Since October several high profile business failures and scandals have had a chilling effect on business reputation (Presidents Club, Cambridge Analytica, Carillion, to name but a few). Our analysis has seen a drop off in the number of people who believe businesses have a good reputation, now sitting at 56%, a reduction of 9% in 6 months. Whilst this is a disappointing result, it does demonstrate that companies do have the power to change public perceptions through the actions they take.

**Standing up for, and having a view on social issues, has certainly paid off for Nike so far**

Nike sales appear to have increased in the wake of its controversial advertising campaign, using Colin Kaepernick as the face of the brand. Millennials in particular have flocked to support the brand.

In 2016, the football star refused to stand for the US national anthem in protest at police brutality and racism. Other players followed suit, in a protest which divided the country and angered President Trump.

And so while the Nike share price dropped 2% overnight - usually terrible news - online sales grew by 31% over the holiday weekend after the ad launched. Nike stock investment from millennials has now grown by 45% on the digital investment service platform

aimed at millennials, Robin Hood, and at last look was the 37th most popular stock..

**Senior Strategist at Lego, Ben Campbell, explains on LinkedIn:**

“Under-35s pay attention when brands stand up for causes. They listened when Levi’s spoke up about gun control. They listened when LEGO began to invest in bricks made from sugarcane. And you bet they’re going to pay attention when brands stand up for #blacklivesmatter.

They’ve re-positioned themselves to an entire generation of new fans. Young people. And in case you didn’t realise, young people buy a lot of sneakers.

The world’s leading apparel brand has just rebooted itself. It’s a challenger brand now, and young people like that. Just Do It? Well, they just did.”

**James Endersby**  
Chief Executive, Opinium



## The fast fashion king

Primark has pioneered the way for offering stylish yet affordable clothing with no shame to their name as far as profits are concerned. Their laser focus on providing fast fashion that delivers 'value for money' has resulted in sky high scores on our metrics in this category.

Ambitious and growing, Europe wasn't quite enough for this giant. Primark is now fiercely expanding, having recently gained the title of 'fastest growing retailer in the US' with new stores opening along the East Coast and Florida booked in for 2019. As the retailer continues to roll out its heady mix of 'Amazing Fashion, Amazing Prices', consumers remain excited to see what the brand known for pushing the boundaries will do as it grows in popularity, familiarity and connection.

Whilst the press hasn't always been kind to Primark's scruples, the brand is making a concerted attempt to reposition itself as an ethical retailer. For the first time ever Primark has published detailed information about all the factories it works with, arming itself with transparency. They also teamed up with fashion designer Henry Holland last spring to create a range of 100% sustainable tote bags with part of the profits going to Graduate Fashion Week Foundation to support emerging talent. As Primark seeks to boost its CSR ratings, other High Street retailers wait with baited breath –the brand is cleaning up its reputation and with it, the competition.



## Brand expert view – Primark

# How Primark has designed an end-to-end experience for customers

From its humble beginnings in Dublin in 1969, Primark has grown into a truly international business with almost 400 stores and 80,000 employees across the UK, Ireland, mainland Europe and the US. The pace of growth and expansion has quickened over the last decade. In the 2017 financial year the company added over 1.5 million square feet of new selling space and experienced sales growth of 19%. In their half year trading statement in March 2018 the company reported that sales were up 8% year on year and anticipated to strengthen further in the second half.

How is all this even possible when many of the best-known retailers on the High Street are closing stores and seeing profits tumble?

Primark's success is no accident and in my view is down to three things:

### 1. Clarity of brand purpose

They are crystal clear about who they are, what the Primark brand stands for and what makes them different. The Primark brand vision is all about bringing amazing, affordable fashion to everyone. Democratising fashion and making it accessible to so many is insightfully in tune with customer needs during a period when living standards have stood still for over a decade for most people.

### 2. Strong understanding of their customers

Through Primania at Primark.com, the company's website, Primark has built a strong community of over 12 million customers across all social media channels. Primania is a vibrant, engaging, two-way channel for the company to share new ideas, fashions and trends and to hear from customers who are encouraged to post selfies of themselves to show off their style. Primark's brand, retail and design and buying teams are constantly in touch with customers directly and through the Primania community.

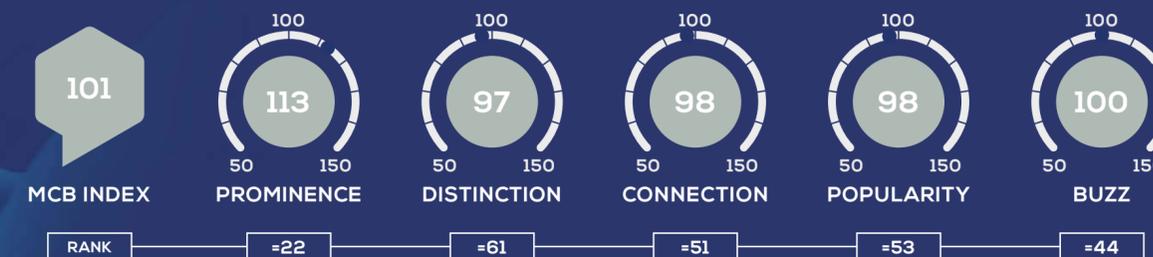
### 3. Continuously evolving customer proposition

Although Primark's brand purpose has not changed, they have evolved the offering beyond clothing to include homeware, beauty, activewear and gifts. Recognising the need to create a reason to visit one of their stores – beyond low priced stylish fashion – Primark has focused on opening iconic, beautifully designed stores that are contemporary, exciting places to shop. Some stores even feature beauty salons and coffee shops. Service has not been forgotten either. Historically, Primark didn't do service but in the last five years they have recognised the importance their people play in shaping the experience that we have as customers. The company's aim has been to create an easy shopping experience, that's fun and shows customers that they are valued and cared for during their shopping visit.

Primark has carefully designed a total experience for customers to enjoy. My money is on the fact that they will continue to innovate, thrive and build the strength of the Primark brand over the next decade.

**John Aves**

Chief Executive, cp2experience



### Any model you want, as long as its electric

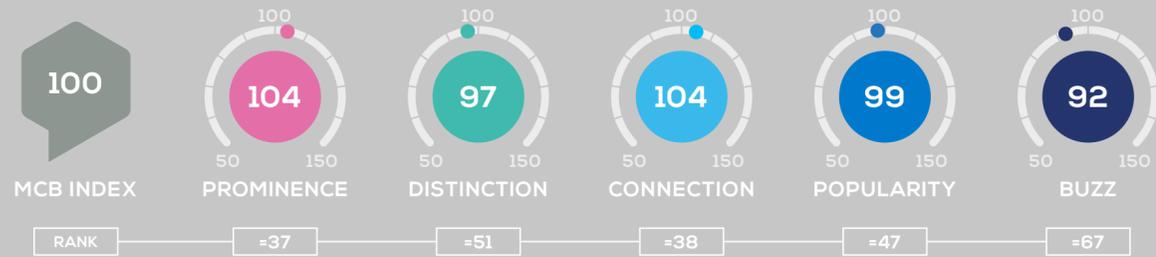
Ford, one of the most prominent and iconic automotive manufacturers in the world is the only car brand that breaks into the top 50.

Founded by Henry Ford in 1903 with USD\$28,000 from twelve cash investors, it would go onto become one of the largest and most profitable companies in the world.

Despite a recent slow down in sales, Ford continues to be a firm favourite for British drivers, topping sales of both Volkswagen and Vauxhall so far in 2018. The launch of the Ford Fiesta in 1976 has been the driving force behind Ford's continued success, and it is still to this day the top-selling car model in the UK with 62,637 registrations so far this year.

So what next for Ford? The company is now looking to join a host of other car manufacturers who have already outlined ambitious plans to offer more electric vehicles. Earlier this year the car manufacturer announced an acceleration of its electric effort, boosting its investment in electric vehicles to £8bn in the next five years, and more than doubling a previous commitment.

It comes as countries around the world put more pressure on car makers to rein in carbon emissions. For Ford, which has always proclaimed its commitment to environmental sustainability, it's a natural next step as it looks to travel the road to continued success.



## Staying hot by being cool

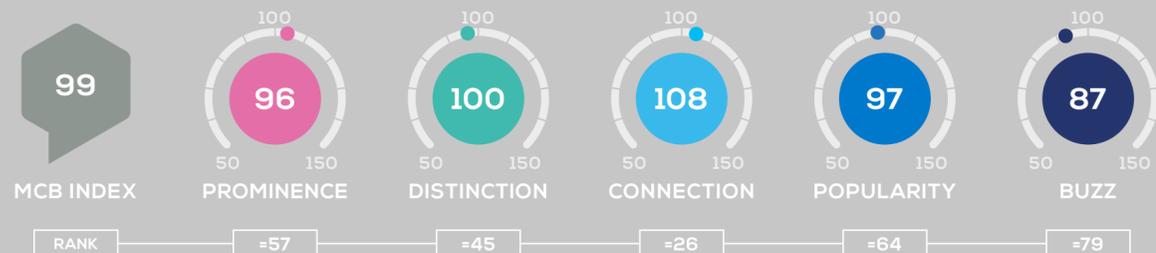
Tetley is a British icon. Established in 1837 by two brothers in Yorkshire and is best known for its iconic Tetley Tea Folk advertising campaign. With brand perceptions anchored in the county's heritage, the brand has forged a strong emotional connection with consumers and remains one of the most prominent tea brands within the market.

The brand activates deep-seated emotional triggers related to happiness, belonging, comfort, love and security. Tetley's identity remains distinct - perceived as iconic, having values we relate to and being something the British public just couldn't live without.

But, whisper it quietly, the brand is actually now owned by Tata Group, one of India's largest conglomerates and demand for black tea is falling.

You don't survive as a company for over 180 years, however, by sitting back and putting your feet up. Tata is seeking to re-energise the brand by focussing on growing product areas, most recently releasing Super Squash and Cold Infusion to expand the Tetley portfolio. Time to pop the water filter on?





## Standing firm but not still

It is a fantastic achievement for Panasonic to break into the top 50, as 75% of Panasonic's business lies in the B2B area. An achievement that is even more remarkable given its recent transition from a consumer electronics provider to a solutions-based company. This puts them at a disadvantage to other brands on the list since their products often have less visibility as they are under the bonnet technology for other brands and products. In many cases they are quite literally under the bonnet with the company embracing environmental solutions such as batteries powering electric vehicles, which may be why brand prominence is less of a strength.

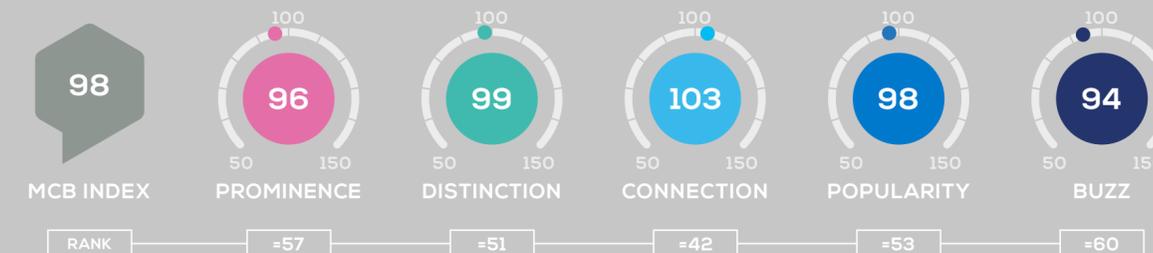
Whilst the move to environmental and social solutions is relatively new and best reflected in Panasonic's current slogan 'A Better Life, A Better World', this remains true to the

founder's core principle of 'contributing to society'. Embracing change, whilst maintaining the founding principles is potentially the reason for the brand's strength in creating emotional connections with customers.

With the company celebrating its 100-year anniversary, it is unsurprising that buzz is a relative weakness as, despite the recent transition, many consumers' perceptions of the brand will be rooted in the past.

For Panasonic to move further up the list it will need to communicate the good it does to consumers. Currently the brand is undefined amongst the consumer audience with the quality offered by Panasonic products its only latent strength.





## Streamlining for success

For a company that has experienced nearly a decade of corporate turmoil, it speaks volumes that HP's brand remains among the top 100 in the UK. For many, HP computers are remembered fondly as the devices that enabled their first foray into the digital world, and the company is still responsible for more than a fifth of PCs shipped worldwide.

The firm enjoyed immense power in the early 2000s. Affordable quality combined with reliable technology made the company's products an attractive proposition for both individuals and businesses. Meanwhile, the company pursued a strategy of growth and consolidation, such as merging with fellow manufacturer, Compaq, in 2002.

Yet, despite (or perhaps because of) its size, HP has failed to keep up with the leading edge of

technology and changing consumer preferences. PCs are still widely used, especially in business, but the overwhelming majority of the next billion internet users will get online through smartphones. The firm's problems reached a crescendo with its disastrous acquisition of Autonomy in 2012.

Rather than further consolidation, the company is now focused on becoming a leaner and more agile competitor, as evidenced by major restructurings and its decision to split PC and printer manufacturer HP Inc from business-to-business supplier Hewlett Packard Enterprise (HPE). Over the coming years the brand will need to focus on rediscovering what it does best and what consumers love – high quality personal computers and printers – while also trying to edge back towards the cutting edge of technology.



Our expert views

# Five key trends

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Key trend 1:

# The Rise of Civic Brands

## Stepping in and stepping up

Tom Savigar, Senior Partner, The Future Laboratory

Businesses are increasingly stepping in where governments are failing and acting as forces for good in society. Amid the shift from top-down corporate hegemony to post-ownership models, brands will need to act as educators and enablers, providing tools for a de-centralised economy.

In the UK, cuts to public spending in the coming years will affect education, social care and social housing, according to Trades Union Congress. It is not surprising that late-majority consumers are characterised by distrust, disconnection and disenfranchisement. This group comprises middle-to-low-income consumers who work hard in nine-to-five jobs and pay their taxes but cannot afford the lifestyles they aspire to. Now, they are demanding change.

While trust in banks, government and media is at an all-time low, business is thriving. Kathryn Beiser, Global Chair of Corporate Practice at Edelman, argues that “business is the last retaining wall for trust. Its leaders must step up on the issues that matter for society.” Research shows consumers agree. Some 65% believe that businesses bear as much responsibility as governments for driving social change.

The potential value unlocked by companies taking a long-term approach could be worth nearly £2.4 trillion (\$3 trillion, €2.9 trillion) by 2025, according to McKinsey. “In the future, it will be even more vital for companies to work together with states and NGOs to create value for societies”, says Kati Ihamäki, Vice-President of Sustainable Development at Finnair.

### What this will mean for brands:

With the decline of the public sector, brands will increasingly need to communicate a real sense of purpose and create actual social change

Millennials and members of Generation D will happily drop profit-driven ventures for those that take a community-driven approach

Consumer distrust is widespread and brands will have to re-establish their position as a trustworthy entity that people look up to for guidance and leadership

Brands will shift to a post-ownership strategy, and will need to become part of the peer-to-peer economy to remain relevant

Brands will be seen as an educator rather than an employer. A highly skilled workforce is crucial for brands that want to ensure long-term growth and retain talent

Brands will collaborate with like-minded individuals and competitors, as networking, sharing research and cross-promoting development become key to innovation

## Key trend 1: The Rise of Civic Brands

### Dyson brand-ucating the next generation

When it comes to brands becoming educators as well as employers to future-proof their business models, Dyson understands this situation perfectly.

There is a global skills shortage and a rapidly evolving economy that prioritises digital-first industries. Workforces are increasingly made up of freelancers, pushing employers to offer education and development as a means of retaining staff.

Indeed, Dyson's research shows that advances in technology mean the UK now needs 10 times as many engineers as it

did 10 years ago, but the infrastructure needed to action this is not in place. Meanwhile, austerity measures are making it difficult for public institutions to address the widening skills gap in engineering.

To counter this, Sir James Dyson is investing £15m in the Dyson Institute of Technology over the next five years, and students will not pay fees as well as receiving a salary of up to £16,000 per year.



**“The UK’s skills shortage is holding Dyson back as we look to increase the amount of technology we develop and export. We are taking matters into our own hands.”**

Sir James Dyson

## Key trend 2:

# The Shapeshifters among us

## Why brand adaptation is imperative today

Prachi Tiwari, Engagement Director, Landor

Today's world isn't one of absolutes. Change is the order of the day – a reality that's not about to disappear. These changes are about behaviours, likes and dislikes, and even values. Similarly, brands used to be absolutes – wholesome but stubborn, resistant to the slightest shifts and averse to adaptation. But today, working with change, rather than resisting it, is more important for brands than ever before. Whether the company is a startup or an established player, flexible evolution helps brands expand and ready themselves for the future.

Successfully pivoting a brand – whether executing a 180-degree turn or a slight change in strategy – is all about keeping your eye on what consumers really want, even if it's different from what the brand originally provided.

Here are three lesser-known brands not yet in the index that have successfully flexed and reenergised their brands through agile, adaptive strategies.

### Vuori

In 2008, 40-year-old Joe Kudla started Vuori, yogawear for men. While niche retailers stocked his brand, Kudla quickly faced serious cash burn at a rate even faster than his revenue growth.

Researching his buyers, he realised that customers weren't using Vuori for just yoga. In fact, yoga was just a supplement to most men's overall fitness regimens. According to Kudla, this was the brand's "pivot or die" moment. "While female consumers might want to identify as yogis, men really don't," Kudla explained. So, the brand reconfigured its strategy,

positioning and retail plan to be more relevant to its target audience.

By revamping the brand's messaging to focus on a variety of fitness activities undertaken by men, Vuori moved from being a yoga brand to a lifestyle brand for men, allowing its audience to choose how they used the clothing and where they wore it. From 2015 onward, without changing a single product, the brand became all about activewear designed with a West Coast lifestyle in mind.

## Key trend 2: The Shapeshifters among us

### Moven

Pained by the unchanging experience of standard banks, Moven was conceived as a digital solution to help consumers shop, buy, live and manage their money better. The brand was targeted at today's new breed of digital natives and finding relevancy when most banks were struggling to manage the curveballs of a mobile-first user experience.

From making personal payments by email, text or Facebook to making in-store payments through the National Finance Center (NFC), Moven sought to establish a new paradigm for consumers and banks. However, its product required a sizeable behavioural shift for consumers – a shift

the banking landscape wasn't quite ready for.

It has now evolved into co-branding relationships with large banks across geographies, helping it bring established financial institutions into the digital age. It found a way to speak to millions of consumers who were wary of depositing their paychecks directly into a neobank, but actually liked the money management solutions Moven offered. Building on its strengths of simplicity and understanding users' pain points, Moven adapted to find new growth and relevance with consumers.

### Western Union

In its heyday, Western Union sent out more than 200 million telegrams per year. The growth of cheap long-distance phone services and the advent of the internet slowed down its business. In 2006, Western Union shut down its telegram business for good, but revived its wire transfer business (which began in 1871), taking its first steps in the world of online money transfer.

It diversified into offering consumer-to-consumer money transfers, business solutions, bill payment services, and stored value options such as prepaid

cards. It recently launched a money transfer bot for Facebook Messenger users in the United States to send money to more than 200 countries across 130 currencies.

With more than 550,000 agent locations in 200 countries, Western Union is now the world's largest money transfer service. Although telegrams are no longer part of it, the company survived disruptive new innovations, by harnessing its power to transform its business model and navigate today's fast-paced economy.

## Key trend 2: The Shapeshifters among us

### A checklist for building adaptive brands

A few common themes emerge from these examples, showing how brands can endure by staying relevant and competitive.

#### Understand the customer's desires

By relentlessly pursuing information about customers' mindsets and expectations, brands can keep track of where they are meeting relevant needs and where they aren't. Gut feel won't simply be enough.

#### Go after the right metrics

Tracking the right set of brand, business and competitive metrics is critical to help brands stay ahead of the field. In-depth analysis allows companies to see how, when and where their business can pivot.

#### Keep a flexible outlook

Sometimes evolving a brand means letting go of long-held offers or moving away from the current core customer. Businesses need to be unafraid and ready to change.

#### Make smart, strong choices

Deciding the future course for a brand requires an objective mindset, bravery and certainty of focus to make the optimum choice. Brands must know their mission and stick to it.

Building flexibility and adaptability into a brand's strategy is the key to ensuring survival – not just today but tomorrow. By building flex into the fibre of their brands, companies can ensure that they endure and thrive for years to come.



Key trend 3:

# Generational dynamics

Age is simply a number

Wez Eathorne, Research Director, Opinium

When comparing the differences between the generations, it is tempting to fall on lazy stereotypes. For example, that older consumers favour nostalgia and brands steeped in history whereas for the young it is the shiny and new. Or that older consumers want the reassurance of bricks and mortar, whereas the young prefer the sanitisation and convenience of a computer screen.

This is far too simplistic. Our study shows that the differences are driven by fundamental changes to our society, in the face of social, cultural and technological trends.

**“Young people truly care about what their purchasing power can do for the world. The recent Nike advert with Colin Kaepernick demonstrates that our generation expect brands to be agents of social change.**

**Opinium’s Most Connected Brands study highlights the need for brands to rethink how their business model places social inclusion at the core of their strategy.”**

Mete Coban,  
Chief Executive, My Life My Say

## Key trend 3: Generational dynamics



# Major generational trends

### A brand for me

Younger generations increasingly want brands they can identify with. The most straightforward example is Pepsi, which clearly markets itself as a product for the young and beautiful. However, more tricky is forging a connection based on the broader brand purpose and shared values. Nike is a great recent example, choosing to polarise opinion with their Colin Kaepernick-fronted campaign, which both inflamed tensions in the US and led to an increase in online sales but a hit to their stock price.

### Global commercialisation and changing tastes

A further trend is how global food and drink influences are affecting our culture and tastes. The social aspects of hanging out at Starbucks resonate with younger consumers. The side-effect is that coffee has overtaken tea as the nation's favourite drink, relegating the relevance of brands like Tetley among the millennial audience.

### Functional versus aspirational value

Our list shows that all generations like a bargain, however, perceptions of what represents 'value' differ. For the older generation, saving money on their weekly shop is most important, highlighted by the pull they feel towards Aldi, Lidl and Home Bargains. For the younger generation, low cost apparel from Primark and TK Maxx enables them to mimic the catwalk at a fraction of the cost.

### A revolution in content choices

One of the most striking differences lies in how the generations consume content. Auntie (the BBC) still holds a special place in the heart of the older generation, whereas the greater personalisation, choice and immediacy of streaming services (Netflix and YouTube) appeal far more to the young.

### 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 the appeal of WhatsApp and Facebook to the young, as well as how we shop, with bricks and mortar retailers like Next and Debenhams losing out to online retailers such as Asos amongst the young.

## Key trend 4:

# Doing well, by doing good

## The new age of corporate responsibility

Emily Dickinson, Director, Opinium

Too often, corporate responsibility is viewed as little more than reputation management by businesses that focus simply on shareholder return. But the accountability of brands to those with whom they do business, and the wider communities in which they operate, has never been more important to consumers.

We have undoubtedly reached a watershed moment in public opinion on the excessive use of plastics. The tragedy of Grenfell Tower highlighted the social challenges facing so many in our cities, whilst we have seen increased scrutiny of NGOs, especially in the international aid sector. The growing awareness of the impact of air pollution on our health, increased pressures on social care and the rising obesity crisis all pose uncomfortable questions about how we

as individuals, and as a society, expect to be treated and to treat others.

As consumers' belief in the ability of traditional institutions to resolve these issues begins to wane, brands and businesses have the opportunity to bridge this divide and represent something more than simply a return on investment.

For companies such as the Co-op, which pioneered gender equality by offering women the same democratic rights within the society as men nearly 75 years before women were granted the right to vote, this is neither new nor revolutionary. Yet in an increasingly competitive retail landscape, the brand's continued success is derived not simply by implementing high ethical and sustainability standards, but from remaining true to this original belief: that the cooperative's size and buying power

would enable its members to facilitate change.

Today's 4.6 million active members are still given the opportunity to shape and influence the organisation's agenda by voting at the Annual General Meeting (AGM), but they are also given the opportunity to affect change daily through the purchases they make. As a member, 1% of their total spend on Co-op own brand products and services is donated directly to community projects which are in turn selected by the members themselves. The scheme's success is derived from the fact that membership drives loyalty by enabling members to become part of the cause without altering their routine.

Buy a pint of milk. Tick.  
Save the world. Tick.

## Key trend 4: Doing well, by doing good

Whilst not every business is a co-operative, nor should it be, there are lessons that brands can learn from the Co-op and others in the top 20.

### Facilitate change

Consumers want to work with brands to create change, but are in demand and time poor. The Co-op's community scheme succeeds because it provides an easily accessible means for people to participate and to immediately see the impact of their actions after every shop.

### Be bold

Consumers have high expectations, but don't always know how to positively affect change. The Body Shop's founder Anita Roddick campaigned for green issues for many years before it became fashionable to do so and inspired millions to the cause by bringing sustainable products to the mass market. Roddick's work as an entrepreneur was as vital as her work as a campaigner to change behaviour.

### Pitch the conversation above the product or service

Over the last 10 years Dove's advertising campaigns have sought to question society's often narrow definitions of female beauty. By focusing on a significant issue which is relevant to both its position in the industry in which it operates and the lives of its customers, the brand has pushed for change by engaging the public in conversation. Conversation which has in turn aligned Dove with 'real' women and driven brand loyalty.

### Tell your story with integrity

Corporate responsibility can't be an advertising campaign, it needs to be a business imperative. The recent John Lewis & Partners rebrand received both critical and popular acclaim because it highlighted the brand's core values and used these as the key marketing messages.

## Top 20 Brand Ranking for Sustainability

- |                          |                  |
|--------------------------|------------------|
| 01 CO-OP                 | 11 SAMSUNG       |
| 02 BODY SHOP             | 12 KELLOGG'S     |
| 03 M&S                   | 13 SAINSBURY'S   |
| 04 GOOGLE                | 14 HEINZ         |
| 05 JOHN LEWIS & PARTNERS | 15 MICROSOFT     |
| 06 BBC                   | 16 WAITROSE      |
| 07 LIDL                  | 17 FAIRY         |
| 08 TESCO                 | 18 ALDI          |
| 09 MORRISONS             | 19 YORKSHIRE TEA |
| 10 DOVE                  | 20 IKEA          |

## Key trend 5:

# Oldest brands staying #mostconnected

Remaining relevant in a hyper-connected world

James Endersby, Chief Executive, Opinium

One striking observation from our top 50 Most Connected Brands is the huge number of companies founded a long time ago. Thirty one of them were founded before 1950 and thirteen all the way back in the nineteenth century. The oldest, Colgate, ranked twentieth in our index, was founded in 1806.

On an average Saturday morning, most consumers interact with a range of Most Connected Brands founded in the nineteenth century, whether it's through a nice cup of Tetley and a chocolate McVitie's, or by popping out to Morrisons, Sainsbury's, John Lewis & Partners or Boots.

With so much choice for consumers, it is hugely impressive that these brands have remained so relevant for so long.

Of course, the huge challenge for all of them is to consistently satisfy consumer expectations in a modern world when they were established over one or two centuries ago. But these brands have triumphed because they are not only constantly challenging their business models and endlessly innovating, but because most of them have also successfully used the magic of their 'heritage' to stay connected with consumers throughout the ages.

Founded in 1869, Heinz, for example, has been around a long time. While Heinz constantly innovates and pushes boundaries across the majority of its products and formats, its cornerstone products maintain 150 years of consistency and invoke warm nostalgic

feelings for today's consumers, in much the same way as they did for their parents growing up. It's no surprise to see Heinz as the third most connected consumer brand in the UK.

Heritage is all about a connection to the past, and it can be absolute gold dust to brands that harness its power. But it's not just about longevity. Brands still need to remain relevant to consumers by constantly innovating, and our Most Connected Brands have done just that. Heritage is a strong foundation but these brands have still modernised year-on-year to avoid becoming outdated and irrelevant to consumers' needs.

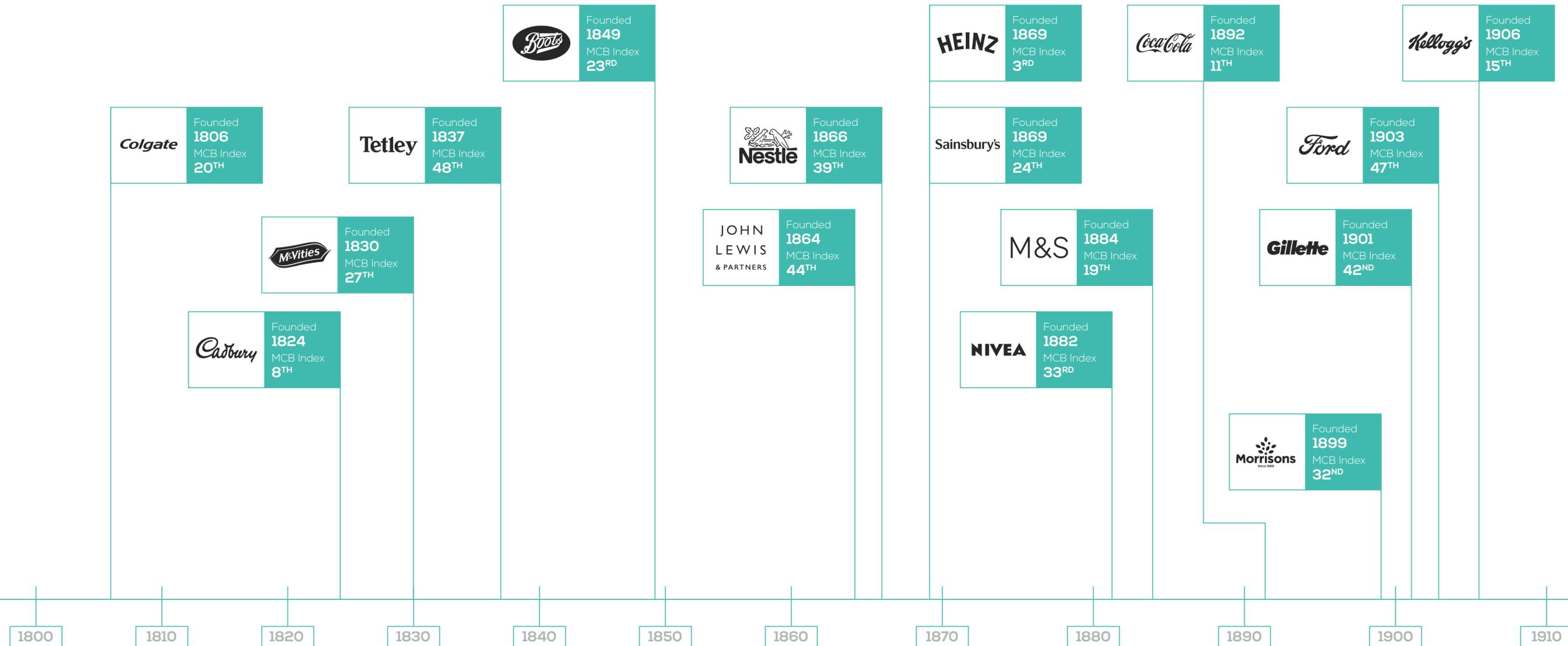
A huge number of our Most Connected Brands have used heritage to help boost a strong emotional connection to

consumers by establishing and re-establishing a connection to the past, generating high levels of nostalgia. In uncertain economic times where there are increasing levels of distrust in big corporations, genuine quality and authenticity are certainly key selling points. In hard times people also look for comfort from the past, searching for nostalgic moments from simpler times, a desire to connect to something that has meaning and looking for comfort in the familiar.

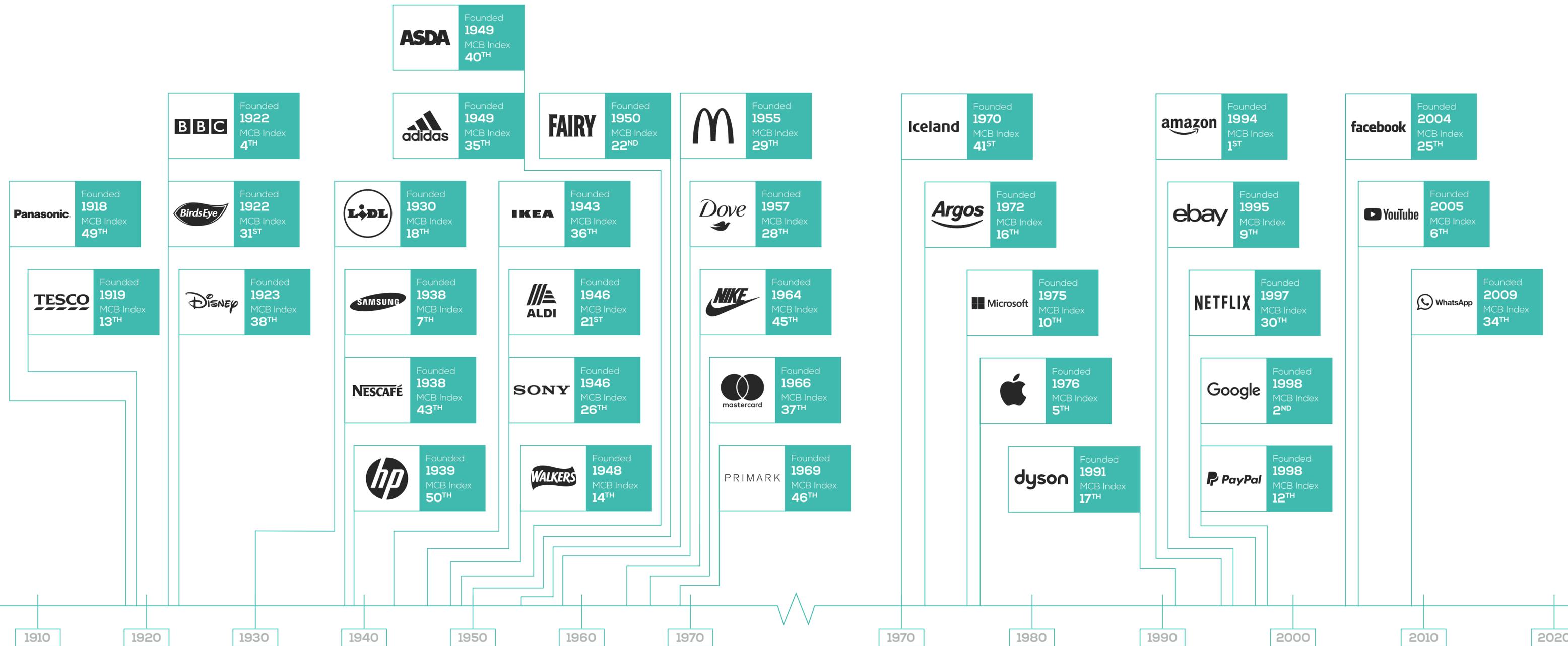
Consistently getting this right, obsessively staying in touch with consumer needs and innovating as if your brand depends on it, will mean consumers continue to feel connected to your brand now and well into the future, just as they have for the past 200 years.



### Key trend 5: Oldest brands staying #mostconnected



### Key trend 5: Oldest brands staying #mostconnected



# The top 100 Most Connected Brands



01	02	03	04	05	06	07	08	09	10	11	12	13	14	15	16	17	18	19	20
amazon	Google	HEINZ	BBC	Apple	YouTube	SAMSUNG	Cadbury	ebay	Microsoft	Coca-Cola	PayPal	TESCO	WALKERS	Kellogg's	Argos	dyson	LIDL	M&S	Colgate
21	22	23	24	25	26	27	28	29	30	31	32	33	34	35	36	37	38	39	40
ALDI	FAIRY	Boots	Sainsbury's	facebook	SONY	MeVities	Dove	McDonald's	NETFLIX	BirdsEye	Morrisons	NIVEA	WhatsApp	adidas	IKEA	mastercard	Disney	Nestle	ASDA
41	42	43	44	45	46	47	48	49	50	51	52	53	54	55	56	57	58	59	60
Iceland	Gillette	NESCAFÉ	JOHN LEWIS & PARTNERS	NIKE	PRIMARK	Ford	Tetley	Panasonic	hp	BMW	Audi	BOSCH	wilko	YORKSHIRE TEA	Superdrug	pepsi	Virgin	SUBWAY	Co-op
61	62	63	64	65	66	67	68	69	70	71	72	73	74	75	76	77	78	79	80
L'ORÉAL	sky	Clarks	George	home bargains	WAITROSE & PARTNERS	LG	BRITISH AIRWAYS	Mercedes-Benz	COSTA	next	VW	Debenhams	Levi's	KFC	VAUXHALL	BT	Santander	TOYOTA	CHANEL
81	82	83	84	85	86	87	88	89	90	91	92	93	94	95	96	97	98	99	100
T-kmaxx	Pampers	DELL	HONDA	MARMITE	THE BODY SHOP	H&M	BARCLAYS	ZARA	LUSH	CONVERSE	PUMA	vodafone	OSOS discover fashion online	STARBUCKS COFFEE	NEW LOOK	Superdry	RIVER ISLAND	LACOSTE	Red Bull



# Sector overviews

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## Changing consumers' daily lives

Josh Glendinning, Senior Research Manager, Opinium

The dominance of the technology sector in the Most Connected Brands index is remarkable. Tech brands occupy a whopping seven of the top ten places, with Amazon and Google sitting at the top of the pile.

But taking a step back, this is hardly a great surprise. If we created an index of the brands that had most changed consumer lives over the past decade, the fallout would surely be similar.

While some – e.g. Microsoft (1975), Apple (1976), and Samsung (1938)– are relatively old players, many of the online giants have only come into consumer consciousness since the start of the millennium.

It is this combination of novelty and salience that makes them quite so prominent in the minds of consumers. While brands have of course transformed the way we live throughout history, this often occurred over the course of decades by companies that are well-established and probably based in the same country.

By contrast, it is incredible how technology brands from the other side of the world have worked us over in every aspect of our lives, and in such a short time frame. Our very development and progress as a society and an economy has become increasingly synonymous with the latest innovations out of Silicon Valley.





Meanwhile, the culture and philosophy that the industry promotes and its technology enables has bled into the way other businesses – and politicians – behave.

Ultimately, the ubiquity of technology in our lives means that modern tech brands can and do position themselves as far more than the cutting-edge yet practical innovators of 1980s technology – IBM, Casio, Kodak. They are Earth’s most customer-centric companies, organising the world’s information, helping people and businesses realise their full potential, and bringing the world closer together.

But it would be foolish to predict that brands whose growth has been so vertiginous could continue ad infinitum.

Obviously, Amazon and Google aren’t going away any time soon and they will soon find even more ways to be part of our lives. But the reputational threats to “the everything store”, for example, are too countless and diverse to even begin to conceive. Certainly, Facebook’s relatively underwhelming 25th position, adrift from its peers with one of the worst scores for social responsibility, is testament to how suddenly fortunes, government regulation, user sentiment and potentially consumer behaviour could change.

Having lost both the innocence and exuberance of youth, tech brands are going to have to readjust their strategies in the years to come.

## Dropping down a shelf

Steve Looney, Research Director, Opinium

Looking at the top 100 Most Connected Brands makes interesting reading from a category perspective. Two of the most prevalent categories are FMCG and tech/media with around 20 brands each in the top 100.

However, just six FMCG brands are in the top 20 compared to tech/media's nine, and FMCG only have two brands in the top 10, compared to seven for tech/media. It's safe to say that had we run this study thirty years ago, FMCG would have contributed considerably more than just two brands to the top 10.

If we look a bit closer at the data we can start to see how this shift has occurred. It is not down to modern consumers being more familiar, or having a stronger emotional connection, with tech/media brands.

Instead, this dominance is driven by our insatiable and obsessive need for the 'next big thing' or 'the new toy', making these brands much more prominent in our daily lives, with all the buzz this creates. While FMCG brands provide necessities such as food and drink, we are now more connected to electronics and communication because of our 'fear of missing out'.

Having said that, seven of the top 10 FMCG brands are food and beverage brands, which is interesting when you consider that companies like Unilever are actively moving away from foods to concentrate their focus on the personal care category.

So how do these giants of our supermarkets and store cupboards regain their crown? The answer is: with difficulty.

They may have to accept that technology has turned consumer heads for good. It is hard to be truly innovative with products in categories such as breakfast cereal, chocolates and soft drinks.

Instead, it could be the technology of the product delivery, rather than the product itself, that will allow the FMCG world to innovate. For example, who'd have thought 20 years ago that we would be using self-check outs with contactless payment?

Both opportunities and challenges face the leading lights of the FMCG world and it will be fascinating to see how these brands evolve and remain relevant in the years to come.



Sector

Media

## Gen Z – the new brand battleground?

Rahul Titus, Head of Influence, Ogilvy

For the last decade, brands have focused on winning the attention and spending power of the ever-elusive Millennials, a target audience smack in the middle of the sacred 18-49 demographic.

However, a sleeping giant has been slowly awakening in the background –meet Generation Z. Usually defined as people born between 1996 and 2011, this new audience is poised to shape consumer behaviour and expectations for years to come, making Gen Z the new frontier for brands to get right.

Projected to account for almost half of all US consumers by 2020, brands who win the Gen Z battle, might win the war.

This is why the likes of Google, Facebook, Amazon, Netflix, etc. have invested heavily in getting their Gen Z strategies right.

However, this isn't easy. Gen Z is as complex and nuanced as every generation before them. There is no catch-all targeting option to lump them into, or any single strategy to engage with them – they are the most diverse and multicultural generation ever.

Having grown up in the era of fake news, they are quick to respond to misdirection and do not respond to hype. Instead, they are looking for brands to be transparent and authentic.





The most inspired brands for this audience are the ones that not only tell their stories, but also allow Gen Z consumers to see them prove their commitment to what they believe in.

Even brands that have always thrived amongst a Gen Z audience like YouTube are now finding themselves on rocky foundations. The undisputed home of long form content has had its founding USP stripped away with the launch of IGTV earlier this year.

Competition also rears its head in the form of ad-free streaming services like Spotify and Netflix, which continue to fight for space in a growing market.

At its simplest, YouTube finds itself at a key moment in the brand lifecycle - to stay relevant or decline, with Gen Z holding the keys to their future.

These young consumers wield influence far beyond their wealth and experience and brands are starting to wake up to this reality. Gen Z's fundamental individuality presents the biggest challenge and opportunity for brands. It will be interesting to see which brands get it right and how.

Sector

# Financial services

## Fin plays catch-up to Tech

Alexa Nightingale, Associate Director, Opinium

It should come as no surprise that financial services brands are few and far between within our top 100 most connected brands. As the sector continues to grapple with the impact of the financial crisis, it still has some way to go in rebuilding trust and confidence with the UK public.

At the same time however, there is also great cause for optimism. Opportunities to innovate, use transformative technology and revolutionise how people access and manage their money are now bigger than ever.

This has never been more evident than with the payments industry. Leading the

way on innovation and more closely resembling tech rather than financial services brands, both PayPal and Mastercard are the two financial services companies that have successfully made it into our top 50 Most Connected Brands.

There is no doubt that FinTech companies such as PayPal have transformed financial services. They have disrupted traditional markets by combining bold new business models and cutting-edge technologies and this has rubbed off on to traditional financial services brands. FinTech companies are now more willing to work with traditional providers while banks are starting to think and innovate like FinTechs.





Barclays is a case example of this. Successfully featuring within our top 100 Most Connected Brands, it leads the way in open banking technology having just launched the UK's first open banking app. Customers who have a current account with seven of the UK major banks are now able to view all their balances and transactions in one place, giving them a complete overview of their money at a glance.

Santander, also featuring in our top 100 Most Connected Brands, is an example of a bank which has successfully managed to turn around its fortunes since the financial crisis. Its 123 Current Account became one of the most popular on offer, and has drawn in hundreds of thousands of customers since it launched. Despite having to slash interest rates for the 123

Account in 2016, the product and its positioning has had a major impact on retail banking in the UK.

As the financial services sector evolves, a continued collaboration between traditional players and FinTechs will be needed to embrace emerging challenges and new opportunities. New innovations are evidence of an industry which faces a period of significant change as it contends with multiple challenges tied to regulations, legacy systems, disruptive models, and new competitors. The need to deliver a more connected, more collaborative and frictionless experience for customers has become more important than ever. Success will require a willingness not only to adapt to the challenges ahead, but also to embrace them.

Sector

# Retail

## Adding value not noise

Les Wilcock, Managing Director, Outpost

### Competing for the customer's attention.

### Keeping them coming back for more.

### Building a relationship.

### Achieving a sale.

All of these things are key to any successful business, but given the amount of noise in the marketplace, you have to give the customer something more, something of value, something they are actually interested in.

It's good to remember that where we are today is actually no different than where we were 30 years ago. Sure, we have the internet and social media and there's a lot more communication trying to get the customer's attention, but the same marketing principles still apply: raise awareness, create interest, call people to action and sell at a profit.

To achieve this, you have to add value in the customer's mind regarding the offer. Understanding this value and translating it into words and imagery that 'connects' with the consumer is the challenge for everyone involved in marketing. It's all too easy in retail to fall into the trap of product promotion after product promotion, expending more and more effort for diminishing returns.

To understand what to say to customers, you need to understand what makes them tick. Forget the customer's aspirations and motivations at your peril, and always have the target market's needs in mind. This will help develop your brand's prominence, distinctiveness, popularity and buzz.



To connect, to have emotional affinity with our customers, to make sure we are always front of mind: we need to offer value and keep at it.

So, who does this well?

Nike are always adapting to the changing market, not only from a content viewpoint but a full consumer experience.

And Mr Porter is another example of providing value added content to its consumers.

But it's not just mid-and premium-end brands that are succeeding. Primark has recently left rival New Look announcing store closures thanks to the former's broad offering of affordable fast fashion and a savvy social media strategy.

It's important to remember they don't have an ecommerce website either. They

boast 5.3 million Instagram followers and focus on connecting the public with the latest trends in-store through fresh, eye-catching imagery to create conversations.

The retail sector is going through a period of turmoil, with well-known retail names wrestling with margin erosion and, in a number of cases, being unsure as to what their vision or strategic intent is or how to compete.

The marketing communications industry has to respond. It's our job not just to bring ideas to the fore, but to constructively challenge the core proposition and the chosen strategy. 'More of the same' just won't cut it, nor will churning out offer after offer. If you want to stand out and have longevity then it's on you to add value by helping our clients along their own path.

## The checklist:

Creating brand advocacy and a customer following requires an integrated approach to marketing. Consider all channels to reach the customer, not just the current trends or 'fads'.

Creating affinity and distinctiveness takes time, it doesn't happen overnight. You need to be consistent and disciplined, ensuring what you are saying is what interests the customer, not what you think they want to hear.

Use professional advice and support for creating engaging content to avoid falling into the product promotion trap. Be brave, not bland.

Ensure you understand what motivates your target market. Never assume.

Finally, consider the customer journey. Understand where obstacles can get in the way of the customer doing business with you and remove them. Ultimately, you should always make sure the journey is a delight for the customer.

## The top 10 retail brands

						
		PROMINENCE	DISTINCTION	CONNECTION	POPULARITY	BUZZ
1 <sup>ST</sup>	TESCO	130	105	117	108	118
2 <sup>ND</sup>	ARGOS	129	108	116	106	104
3 <sup>RD</sup>	LIDL	99	109	107	121	127
4 <sup>TH</sup>	M&S	125	105	118	99	113
5 <sup>TH</sup>	ALDI	104	107	106	119	126
6 <sup>TH</sup>	BOOTS	125	103	117	105	102
7 <sup>TH</sup>	SAINSBURY'S	116	103	114	105	110
8 <sup>TH</sup>	MORRISONS	108	98	108	105	110
9 <sup>TH</sup>	IKEA	101	110	99	102	107
10 <sup>TH</sup>	ASDA	113	93	105	102	104

## The top 10 FMCG brands

						
		PROMINENCE	DISTINCTION	CONNECTION	POPULARITY	BUZZ
1 <sup>ST</sup>	HEINZ	127	116	127	116	110
2 <sup>ND</sup>	CADBURY	133	112	122	110	111
3 <sup>RD</sup>	COCA-COLA	133	113	107	113	119
4 <sup>TH</sup>	WALKERS	119	108	120	111	111
5 <sup>TH</sup>	KELLOGG'S	119	110	117	110	110
6 <sup>TH</sup>	COLGATE	113	107	120	110	106
7 <sup>TH</sup>	FAIRY	111	110	118	110	104
8 <sup>TH</sup>	MCVITIE'S	102	108	120	108	98
9 <sup>TH</sup>	DOVE	97	108	113	107	108
10 <sup>TH</sup>	BIRDS EYE	113	101	111	105	98



# Methodology

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Methodology

# How we derived the top 100 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 a 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 11,795 responses from our sample of 1,990 UK consumers and identified the top 200 brands mentioned.

The brands consumers think about

2

## Social media velocity

We measured total social media engagements with content mentioning the brand on UK websites over a 12 month period.

The brands consumers talk about

3

## Brand revenue

We collated publicly available revenue figures for each of the top 200 brands.

The brands consumers buy

## Methodology

# How we ranked the top 100 brands

Once we established the top 100 brands we conducted a nationally representative study among 4,000 UK consumers. Based on our experience of evaluating brands using our MCB Index methodology, we know what makes a brand matter to consumers.

We therefore based the Most Connected Brands Index score on five key measures:



## Prominence

The brand's presence and scale



## Distinctiveness

The brand's unique identity and ability to set trends



## Emotional Connection

The brand's ability to form emotional relationships



## Popularity

The brand's dynamism and momentum



## Buzz

The brand's social traction

## 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 a number of statistical analyses.

Firstly, regression analysis was used to select the variables which are significant in driving brand strength. Then correlation analysis was used to create the weights for the selected variables.

The derived Most Connected Brands score was calculated as a weighted average of these variables. These scores were then indexed on the average, providing a ranking of all the brands included in the study.

## A note on the overall ranking

Whilst brands may have the same overall MCB score, the ranking has been derived from the specific, non-rounded, decimal place data.

## Methodology

# Uncovering rich insights behind the rankings

Within the study we included other diagnostic measures that would explain the unique strengths and weaknesses of each brand.

**Brand consideration and likely future usage**

**Satisfaction**

**Recommendation**

**Delivery on needs**

**Value for money**

**Social responsibility**

**Brand imagery**

Alongside secondary research, this allowed us to explain why each brand appeared in our list and areas they can target for future improvement.

Our final diagnostic was to use our unique emotive framework. Based on psychological theory and neuroscience, we have developed an emotive framework to assess the emotional response to a brand. The questions are timed allowing us to identify what consumers think consciously and subconsciously about each brand.



**Steve Looney**  
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**Wez Eathorne**  
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# Key contributors

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## Key contributors



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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.

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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.



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Carl Thompson is a professional YouTuber and Instagrammer specialising in men's fashion and lifestyle content. He lives and breathes the influencer life, working with major brands to produce stylised and creative content.



**Chris Owen**  
Director,  
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Chris is a Director at M&C Saatchi PR specialising in the technology, business, and innovations sectors. He focuses on developing brand narratives which bring the "why?" to life rather than just the "what". He has written for WIRED, The Daily Telegraph, and Brandwatch on technology and behaviour.

## Key contributors



**Chris Walts**  
Social Strategy Director,  
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Chris has over eight 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.



**Doug Gurr**  
UK Country Manager,  
Amazon

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Doug Gurr 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,  
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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.



**Inga Howell**  
Global Marketing Director,  
Superunion

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Inga is Global Marketing Director at Superunion where her role is to grow the business, strengthen strategic and creative reputation, and build relationships with clients, opinion formers, and partners across the world.

Superunion is a next-generation brand agency built on a spirit of creative optimism. They use upstream creativity to build brands that unite people and organisations.



**James Endersby**  
Chief Executive,  
Opinium

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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, Thought Leadership and Market Understanding. James previously worked in management consulting with Monitor Group (now Monitor Deloitte) and was based out of London, Delhi and Boston.



**Jo Davies**  
Managing Director,  
VIM Group

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Jo Davies is the Managing Director of VIM Group – a leading global brand management and brand implementation company. They help businesses manage brand change and enhance the performance of their brands across local and international markets – both on the ground and digitally.

## Key contributors



**John Aves**  
Chief Executive,  
cp2experience

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John Aves is a board level advisor with expertise in customer experience, culture change and employee engagement. He is CEO at vexperience. John is passionate about customer experience as a strategy to drive customer loyalty, employee pride and profitable growth.



**Joseph Harper**  
UK & Ireland Social Lead,  
Kellogg's

Joseph Harper is Social Lead for Kellogg's UK & Ireland business, and is based in the multi-national FMCG giant's UK headquarters in Media City, Manchester. Kellogg's manufacture products in both the cereal and snacks categories in the UK, including brands such as Corn Flakes & Crunchy Nut, Special K & Pringles.



**Josh Glendinning**  
Senior Research Manager,  
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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.



**Les Wilcock**  
Managing Director,  
Outpost

Outpost is an independent creative agency working across advertising, branding, design and digital. We 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.



**Mete Coban**  
Chief Executive,  
My Life My Say

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Mete Coban, is the Chief Executive of My Life My Say and Councillor for Stoke Newington. He is best known for his work in setting-up the All-Party Parliamentary Group on a Better Brexit for Young People and for contributing to the increase of turnout for young people at the 2017 UK General Election. The youngest ever elected Councillor in the London borough of Hackney, he is also Chair of the Skills, Economy & Growth Commission in Hackney.



**Mike Morgan**  
CEO,  
Red Consultancy

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Mike Morgan is CEO of Red Consultancy, a strategic communications consultancy offering PR, digital and content expertise. He has over 25 years of brand communications and strategic corporate communications experience working with many of the UK's and world's leading businesses and brands from across a range of sectors including FMCG, Retail, Drinks, Sports, Consumer Health and Government communications.

## Key contributors



**Mike Phillips**  
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Mike heads up the strategy team at AllTogetherNow, a digital creative agency, part of The &Partnership.



**Nik Govier**  
CEO and Founder,  
Blurred

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Nik is well known in the communications world having co-founded power-houses Unity and Tin Man, both of which have topped the Holmes Report's Global Creativity Index. Having sold her stakes in both, in October 2018 she launched Blurred, a communications consultancy that embraces the blurring of the lines between marketing disciplines and audience groups.

She has stakes in a number of other businesses including Allbright, the group behind London's first private members club for working women.



**Prachi Tiwari**  
Engagement Director,  
Landor

Prachi Tiwari is the Engagement Director at Landor Mumbai and has over 20 years of experience in managing and driving brand growth. She has worked as a CMO for select lifestyle brands, as a Marketing Director for World Gold Council (India), as a Marketing and Business head, and with a JV of BBC Worldwide and Times of India. Building brands and businesses through inventive strategies, is what excites her most.



**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

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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.

## Key contributors



**Vicki Sjardin**  
VP Marketing EMEA,  
Kraft Heinz

Vicki Sjardin joined Kraft Heinz in 2017 from Unilever. She is now leading Sauces Marketing Development, Marketing Operations and Insight & Planning teams at Kraft Heinz across EMEA and is very much focused on building global brands that people love and value in their lives.



**Wez Eathorne**  
Research Director,  
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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.





What people think,  
feel and do

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# Let's chat

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