



# Brand Reaction Index UK 2023

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1

Why do we test  
emotional  
connection?

# Humans make “fast and frugal” decisions to arrive at “good enough” choices

Behavioural Economist Gerd Gigerenzer



# The three shortcuts used to arrive at 'fast enough' decisions are:



## Availability Heuristic

*The Brand easily  
comes to mind*



## Affect Heuristic

*The Brand evokes  
positive feelings*



## Processing Fluency Heuristic

*The Brand is easily recognised  
in-store/online etc*



2

How do we test  
emotional  
connection?

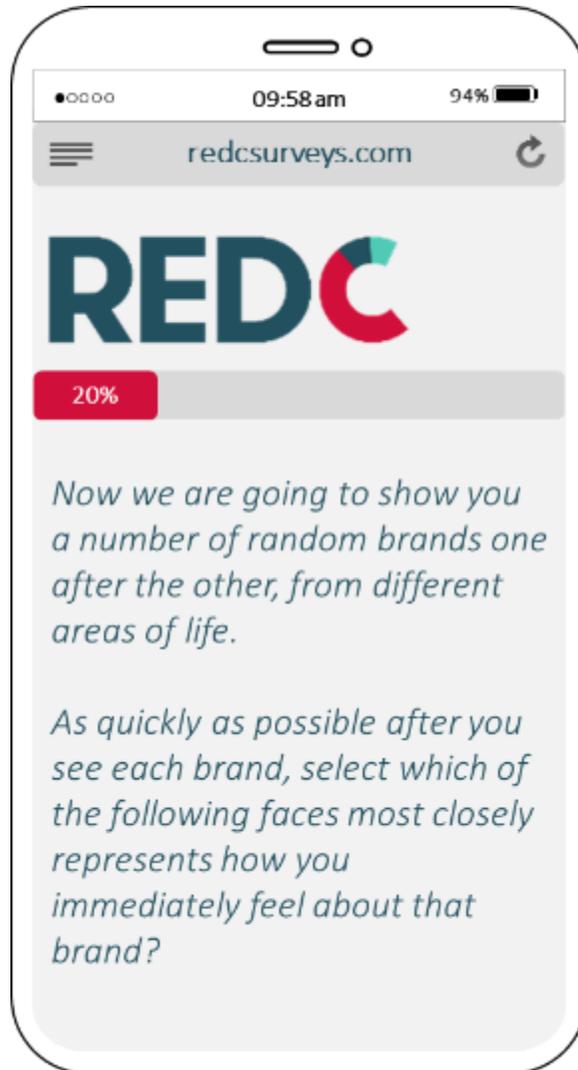


**Affect  
Heuristic**



To test if a brand has a strong enough emotional connection to drive the affect heuristic, we use RED C's  
**BRAND REACTION INDEX  
(BRI)**

# After three years exclusively testing brands in Ireland, BRI has now landed in the UK for the 2023 inaugural wave



We conducted a BRI Test among **128 brands** to see which have the highest emotional connection with consumers.

A **one number BRI score** was calculated for all brands tested and ranked in order of their respective scores.

Where ties have occurred (i.e. two or more brands earning the same score), **we have looked at the results to two decimal places to break the ties.**

The report analyses the BRI results at both a **total level** and at an **industry/sector level** among brands tested.



Happy



Contempt



Surprise



Sadness



Anger



Fear



Disgust



Neutral

# BRI Score Calculation:

A brand's BRI is calculated by taking away the sum of their negative emotion scores from their happiness score

**% NET:  
Positive  
Emotion**



**% NET: Negative Emotions**



**Happy**



**Contempt**



**Disgust**



**Anger**



**Fear**



**Sadness**



3

UK's most  
emotionally  
connected brands

# UK's Most Emotionally Connected Brands

The brands that have most successfully fostered emotional connections are Cadbury, Aldi and Lego.

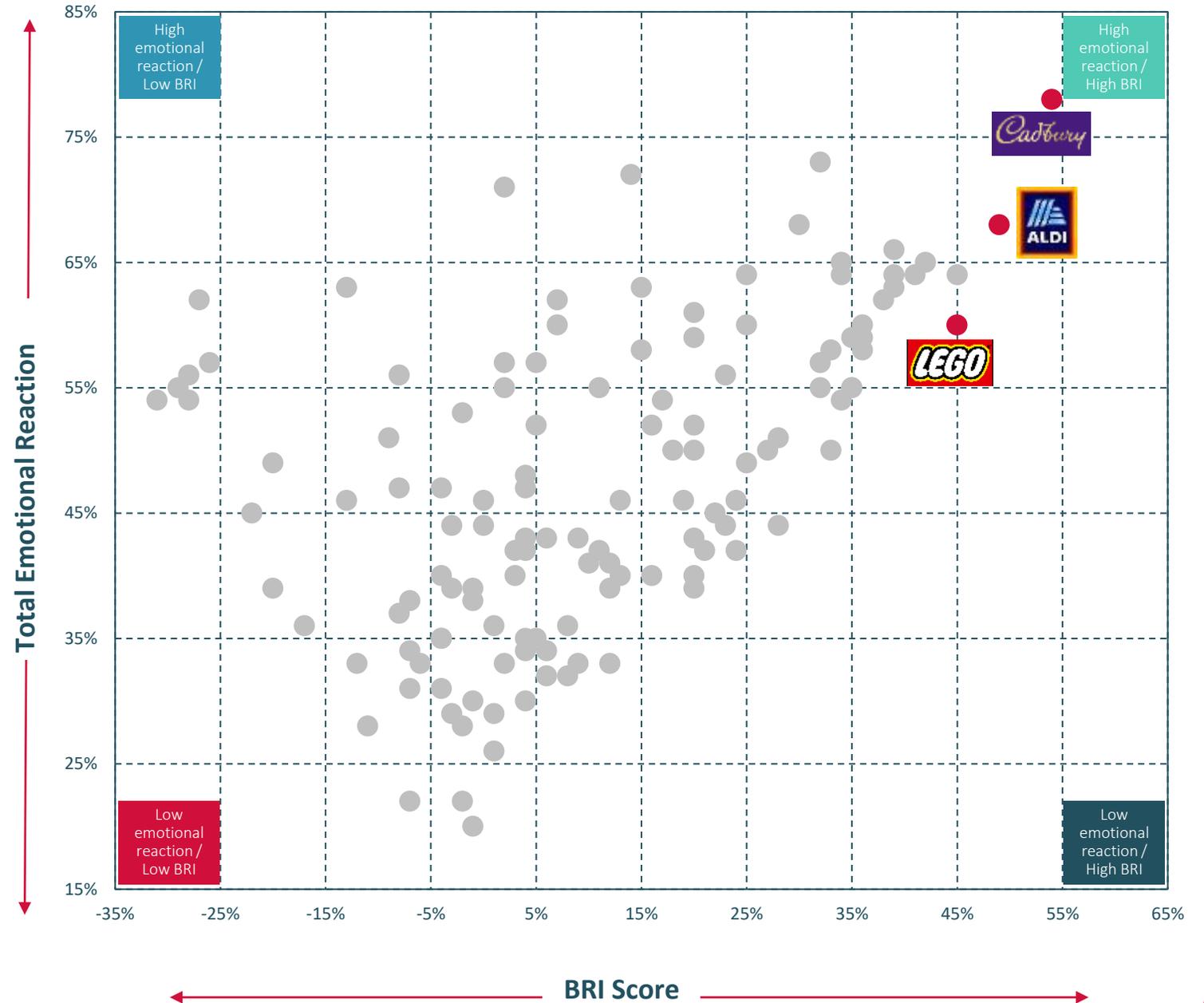
Consumers across generations are emotionally connected to Cadbury which has also retained its top spot ranking in RED C's BRI survey in Ireland. Initiatives such as Cadbury's latest campaign, that cleverly uses storytelling of small acts of kindness aligned with the recognisable slogan 'there's a glass and a half in everyone', supports this intergenerational success.

Rank	Brand	BRI score
1		+54
2		+49
3		+45
4		+45
5		+42
6		+41
7		+39
8		+39
9		+39
10		+38

# Mapping BRI: Top 3 brands

Total emotional reaction measures the extent to which a brand elicits any positive or negative emotional response.

The optimal scenario is for brands to occupy the top-right corner of the map, recording both a strong emotional reaction and high BRI score.



# The top 3 brands for BRI generate a positive emotional reaction



1

**Cadbury** is the most emotionally connected brand in the UK. It generates positivity across all generations: it ranks 1<sup>st</sup> amongst Millennials and Baby Boomers, but also ranks in the Top 5 for other age groups. The brand benefits from the emotions generated by its products, as well as its long heritage as a British brand. The award winning 'Glass and a Half in Everyone' campaign has been credited with helping to reverse declines in Dairy Milk sales and stands out in a cluttered and noisy FMCG space with its unique tone that cuts through on an emotional level.

2

**Aldi**'s performance as the 2<sup>nd</sup> strongest brand on BRI in the UK is likely driven by the increasing need for consumers to find budget alternatives, and the recognition that this doesn't necessarily mean that shoppers need to compromise on quality. Aldi won best supermarket in the Great British Food awards 2022 as well as Which?'s cheapest supermarket of 2022. More recently, it has also won Grocer of the Year at the Retail Week awards 2023, emphasising its ability to bring quality and value at a time when shoppers are being squeezed by high inflation.

3

**Lego** is the 3<sup>rd</sup> strongest brand on BRI in the UK. As with Cadbury, this performance driven by the positivity and emotions created by its products as well as the nostalgia for the brand, that has been loved by families for decades. Lego continues to innovate and in 2022, the LEGO group picked up 7 awards in the annual toy of the year event. The brand also successfully remains current through its regular partnerships with major brands/franchises and adult Lego's positioned as a 'mindful' activity

# 4

## Emotional connection by brands across sectors

- 1) Financial Services
- 2) FMCG
- 3) Food Services
- 4) Gaming/Toys
- 5) Grocery
- 6) Health & Beauty
- 7) High Street
- 8) Infrastructure & Energy
- 9) Out of Town Retailers
- 10) Social media
- 11) SVOD & Entertainment
- 12) Tech
- 13) Telecoms
- 14) Travel



Grocery, Health & Beauty and 'out of town retail' are the top 3 categories for emotional connection in the UK, likely due to importance of the products they sell for everyday life

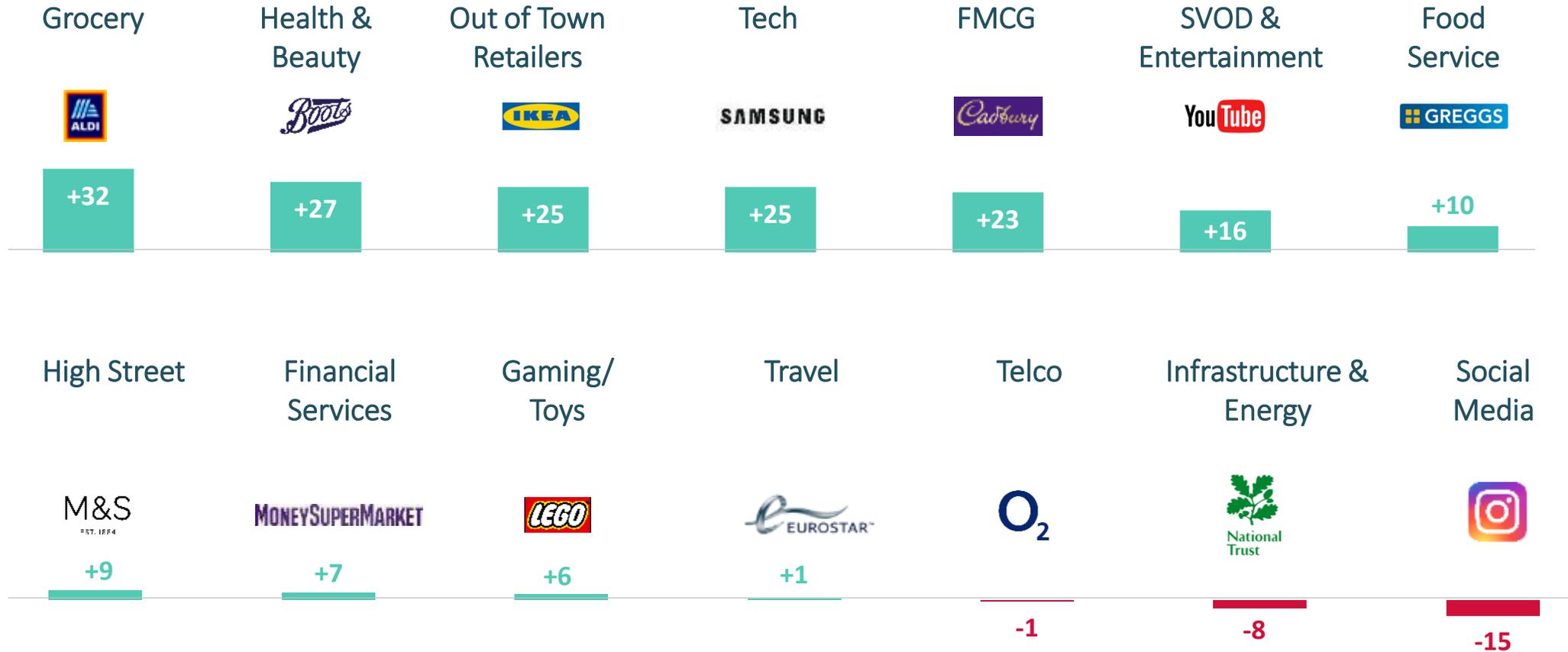
# Grocery is the highest-ranking category on BRI in the UK



This is followed by Health & Beauty, Out of town retailers, Tech and FMCG. Within the Grocery category, Aldi is the top ranking brand.

## Average BRI Score x Industry

Leading brand



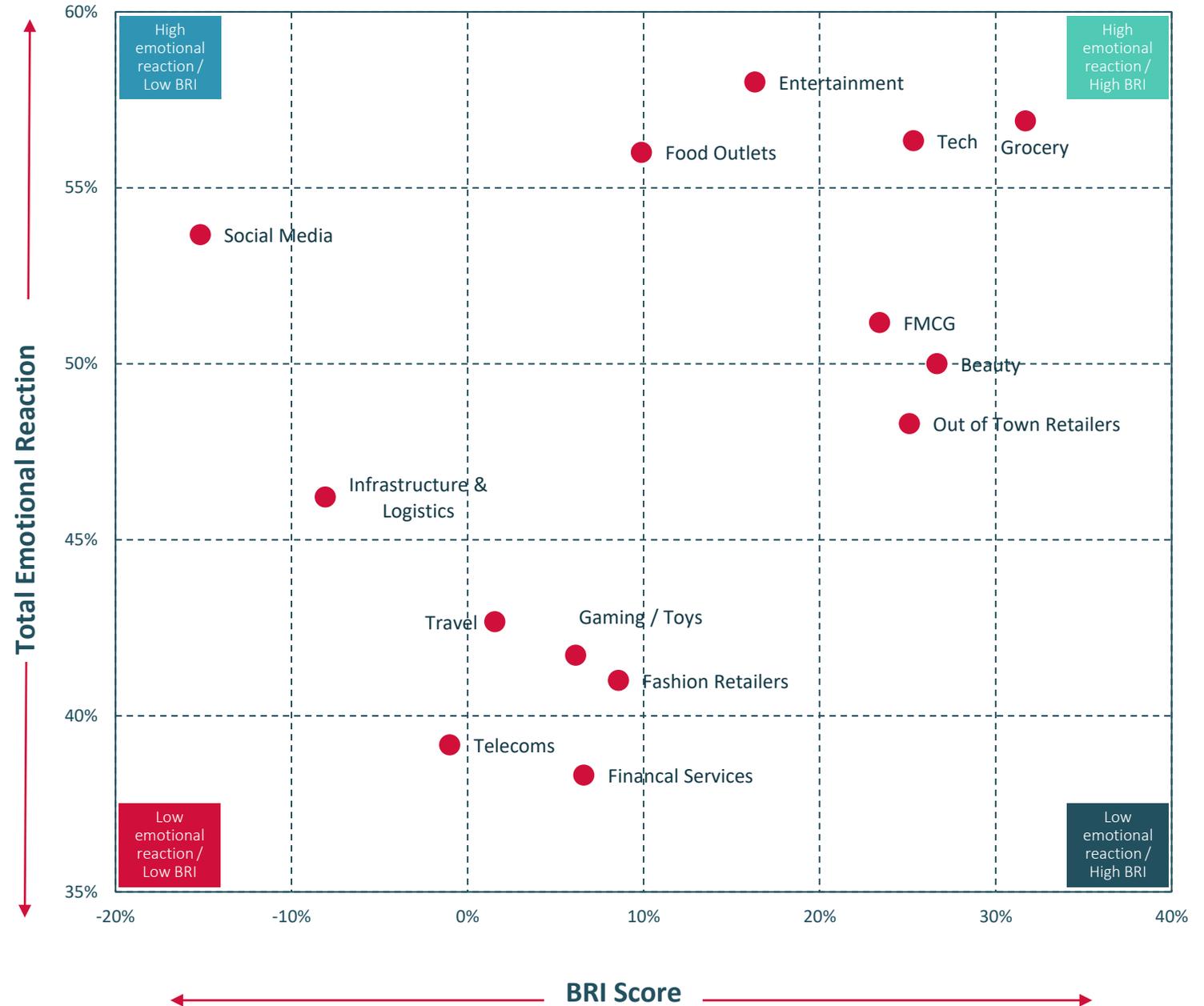
Leading brand



# Mapping BRI: All Industries

Total emotional reaction measures the extent to which a brand elicits any positive or negative emotional response.

The optimal scenario is for brands to occupy the top-right corner of the map, recording both a strong emotional reaction and high BRI score.



# Key sector findings



1

**Grocery brands** dominate the overall top 10 brands, as well as the other categories. Overall, Aldi ranks 2<sup>nd</sup>, Lidl 4<sup>th</sup> and Iceland 15<sup>th</sup>, demonstrating the importance of discount grocery brands, especially in the context of the cost-of-living crisis. M&S Food also generates strong emotional connection and ranks 9<sup>th</sup> (driven mostly by Baby Boomers), bringing the number of grocery brands within the top 10 to 3.

4

**Health and beauty** is the 2<sup>nd</sup> strongest category, with Boots and Superdrug leading.

For **High street retailers**, M&S performs well, followed by Next, Adidas and Primark. When it comes to **Out of town retailers**, Ikea ranks 14<sup>th</sup> overall and other brands such as Amazon and Dunelm also have high BRI scores.

2

**FMCG** also does well as a category, with Cadbury ranking 1<sup>st</sup> overall and being the most emotionally connected brand in the UK. Pringles, Walkers and Hula Hoops also do particularly well.

For **Food services**, Greggs is the most loved brand, ranking 17<sup>th</sup> overall. It is followed by Nando's, McDonald's and Domino's.

5

**Social media** does not have strong emotional connection as a category: Instagram is the only brand with a positive BRI Score, while Snapchat, Twitter and TikTok perform poorly.

In the **Tech** sector, Samsung ranks 10<sup>th</sup> overall, while LG and Apple still make it to the top 50 most emotionally connect brands in the UK.

3

In the **Gaming & Toys** sector, Lego takes the lead and ranks 3<sup>rd</sup> brand overall., way ahead of Nintendo, Playstation and Xbox. Minecraft, Roblox and Fortnite all record negative BRI score.

When it comes to **SVOD and entertainment**, YouTube performs the best and ranks 7<sup>th</sup> overall (mostly driven by Gen Z). Netflix and Amazon Prime also have strong BRI scores. On the other hand, Sky is the only brand with negative BRI in the category.

6

Within the **Financial Services** category, MoneySuperMarket achieves the best, ranking 16<sup>th</sup> overall. It is followed by Post Office and Nationwide. On the other hand of the spectrum are Revolut, Barclays and AXA which all perform relatively poorly.

National Trust is the favoured brand within the **Infrastructure & Energy** category, while energy brands rank last overall – likely driven by the recent news cycle.



Let's see how your brand did against  
its competitors...

# Financial Services



MoneySuperMarket ranks first for this category, followed by Post Office and Nationwide. AXA, Barclays and Revolut sit at the bottom of the table for Financial Services

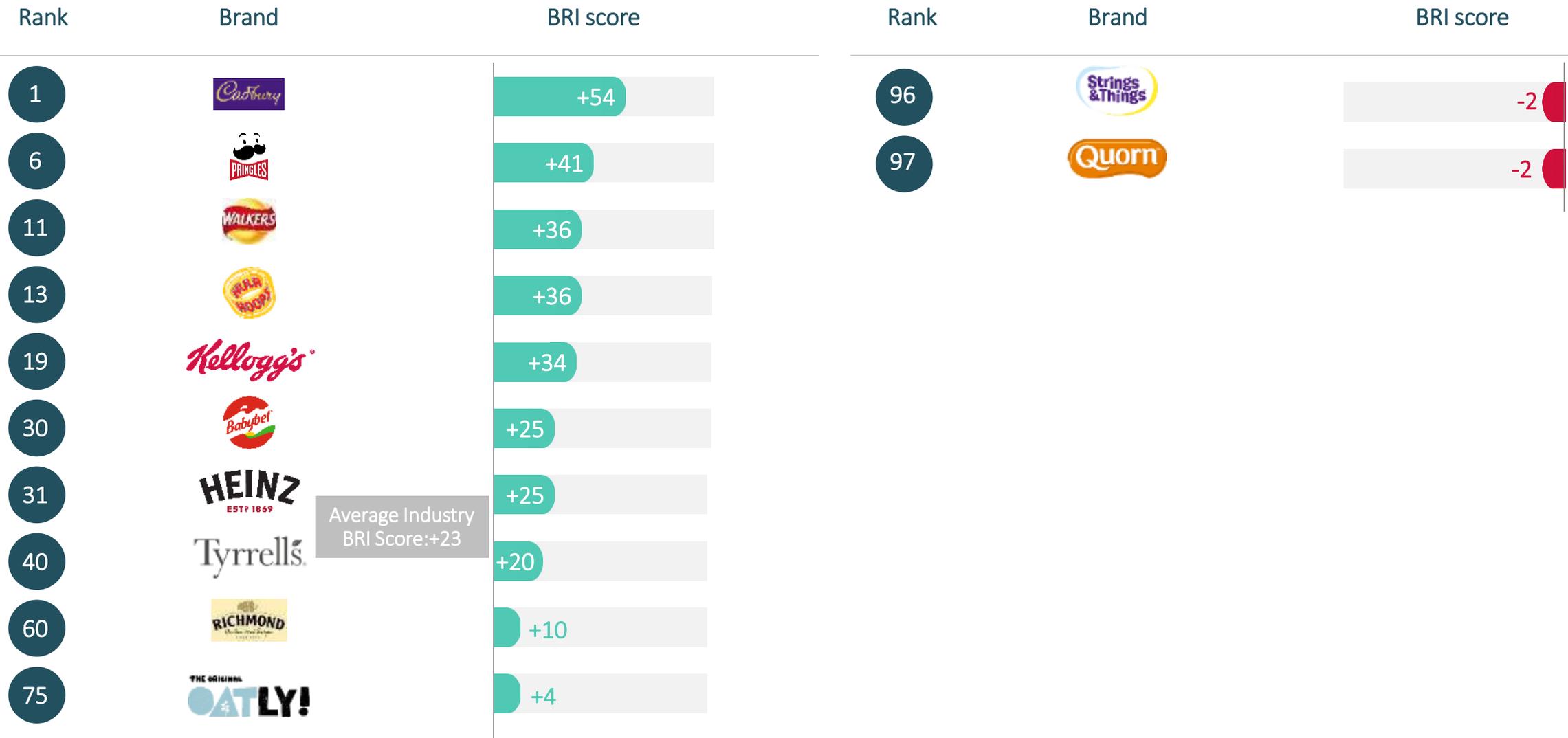
Rank	Brand	BRI score	Rank	Brand	BRI score
16	MONEYSUPERMARKET	+35	95	AXA	-2
35	POST OFFICE	+23	98	BARCLAYS	-3
36	Nationwide Building Society	+22	102	Revolut	-4
63	first direct	+8			
68	AVIVA	+6			
81	LLOYDS BANK	+3			
86	TSB	+1			
92	Bank of Ireland	-1			
93	HSBC	-1			
94	NatWest	-1			

Average Industry  
BRI Score: +7

# FMCG

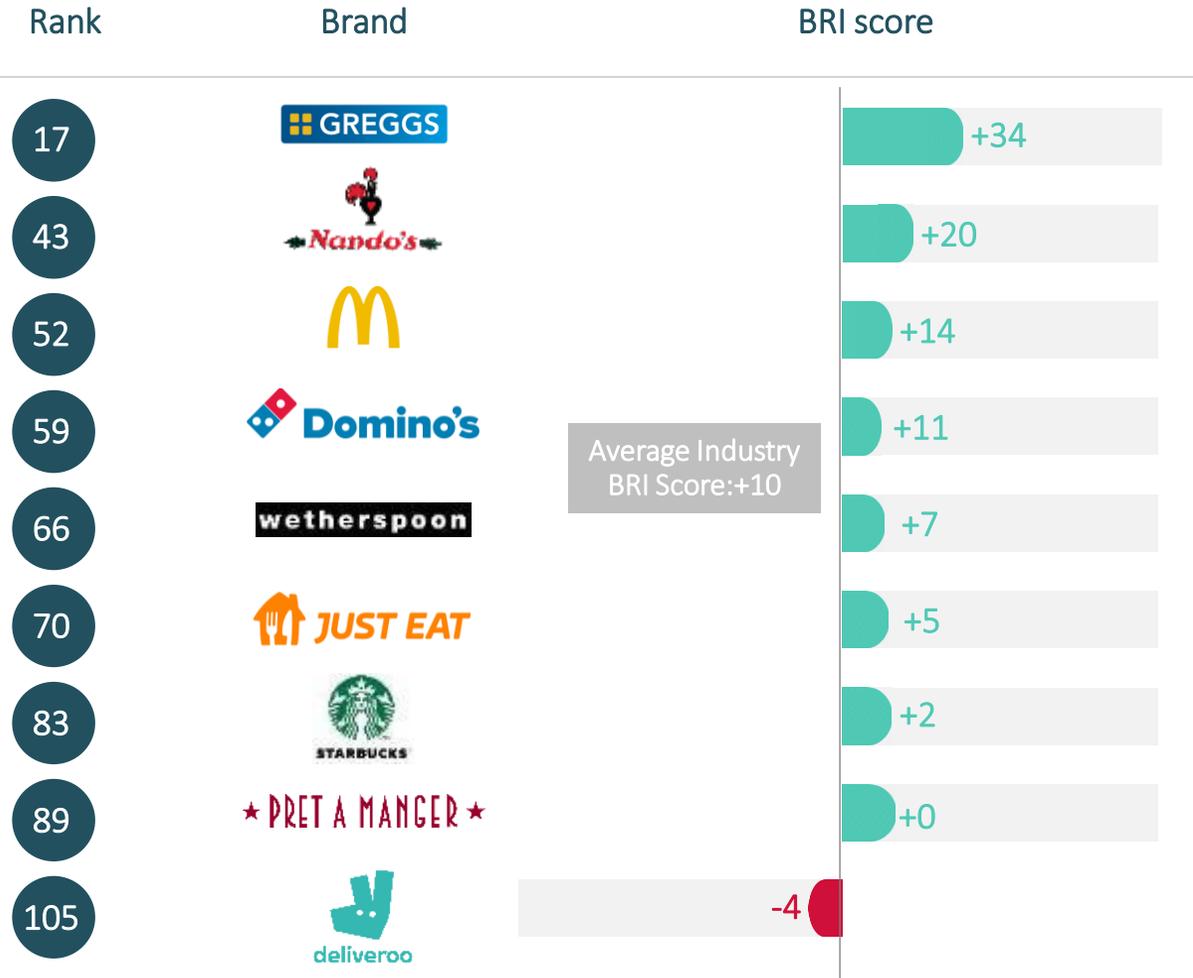


Alongside Cadbury, the most emotionally connected brand in the UK, other FMCG brands perform well such as Pringles and Walkers. Strings & Things and Quorn generate less emotional connection



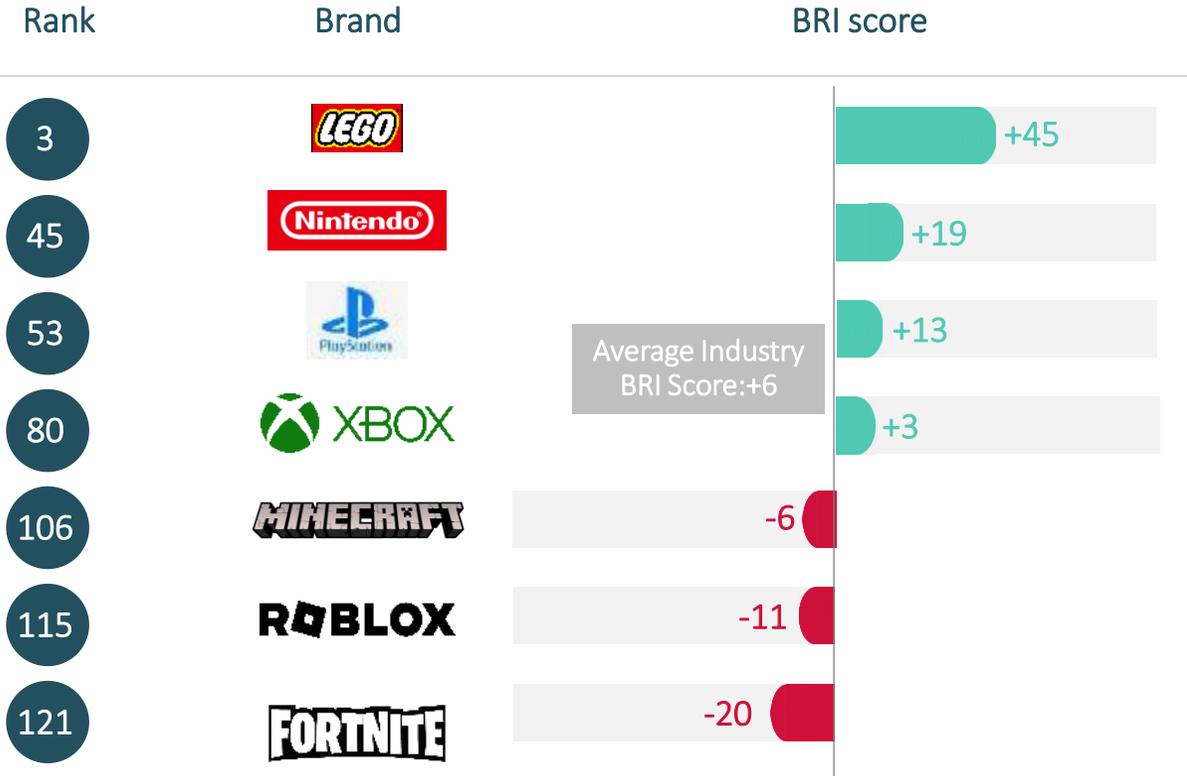
# Food Service

Greggs is the leader in the Food Service category, ranking 17<sup>th</sup> overall. Deliveroo is the only brand with negative BRI



# Gaming & Toys

Lego dominates the Gaming & Toys sector, ranking 3<sup>rd</sup> overall. It is followed by Nintendo, Playstation and Xbox



# Grocery

‘Discount’ grocery brands lead in the sector alongside M&S, a legacy British brand favoured by Baby boomers

Rank	Brand	BRI score
2		+49
4		+45
9		+39
15	<b>Iceland</b>	+35
18	<b>TESCO</b>	+34
20	<b>Sainsbury's</b>	+33
22	<b>ASDA</b>	+32
23	 Average Industry BRI Score:+32	+32
48	<b>WAITROSE &amp; PARTNERS</b>	+16
85		+2



# Health & Beauty

Boots and Superdrug generate similar emotional connection, and both make it to the top 30 brands

Rank	Brand	BRI score
12		+36
21		+33
58		+11

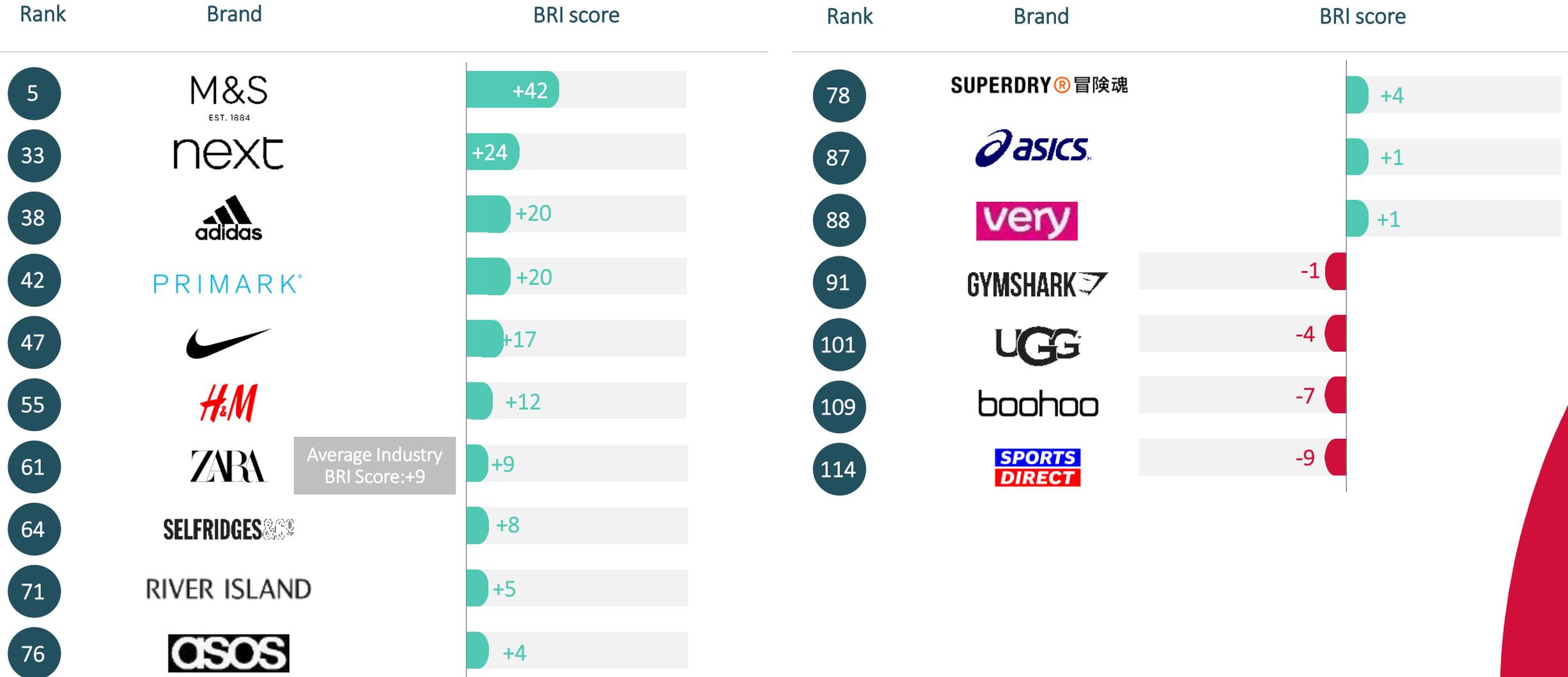
Average Industry BRI Score: +27



# High Street



M&S dominates the High street industry, followed by Next, Adidas and Primark. Sports Direct ranks last in the category, just after Boohoo, Ugg and Gymshark



# Infrastructure & Energy



National Trust, one of the top 10 most emotionally connect in the UK, leads the category

Rank	Brand	BRI score
8		+39
65		+7
67		+6
72		+5
100		-3
110		-7
112		-8
116		-12
117		-13
119		-17

Average Industry  
BRI Score:-8

Rank	Brand	BRI score
122		-22
125		-28
127		-29
128		-31

# Out of Town Retailers

Ikea, Amazon, Dunelm and Currys lead the Out of town retailer sector

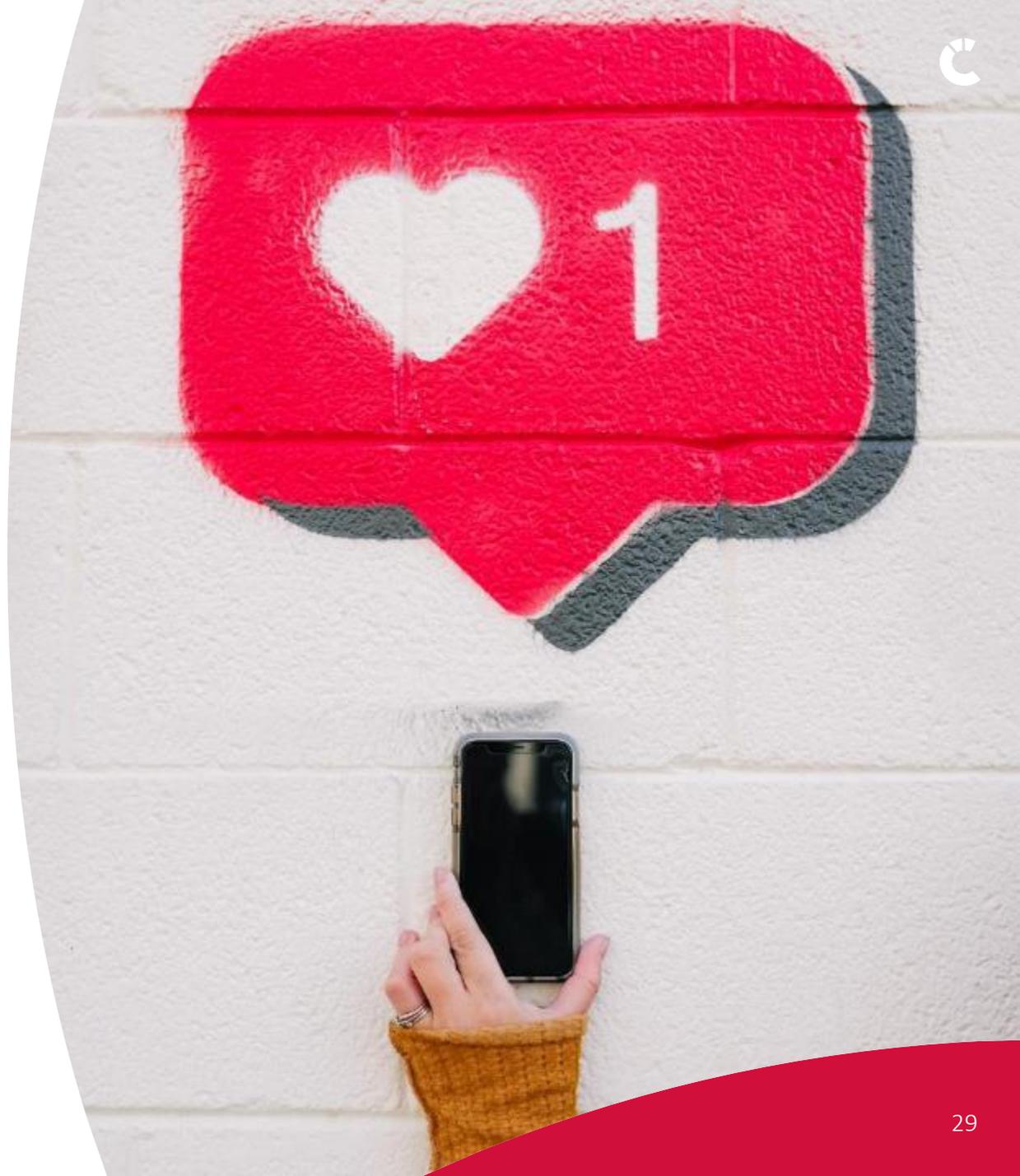
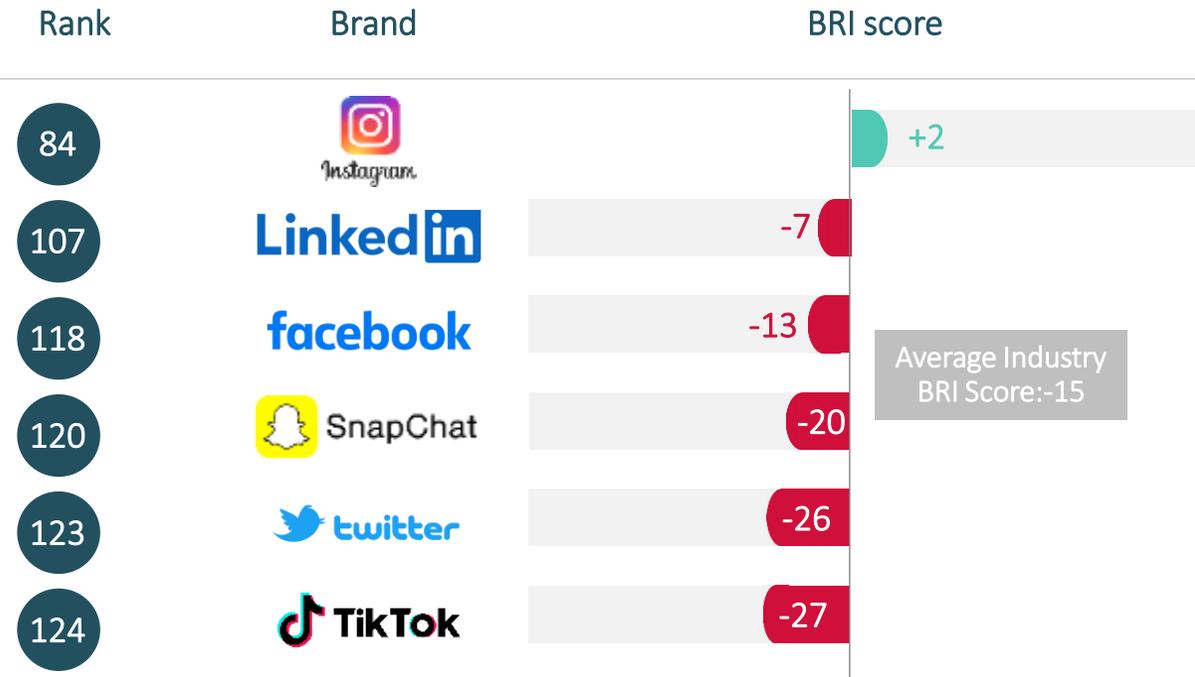
Rank	Brand	BRI score
14		+35
24		+32
26		+28
27		+28
28		+27
32		+24
37		+21
39		+20
41		+20
49		+16

Average Industry BRI Score: +25



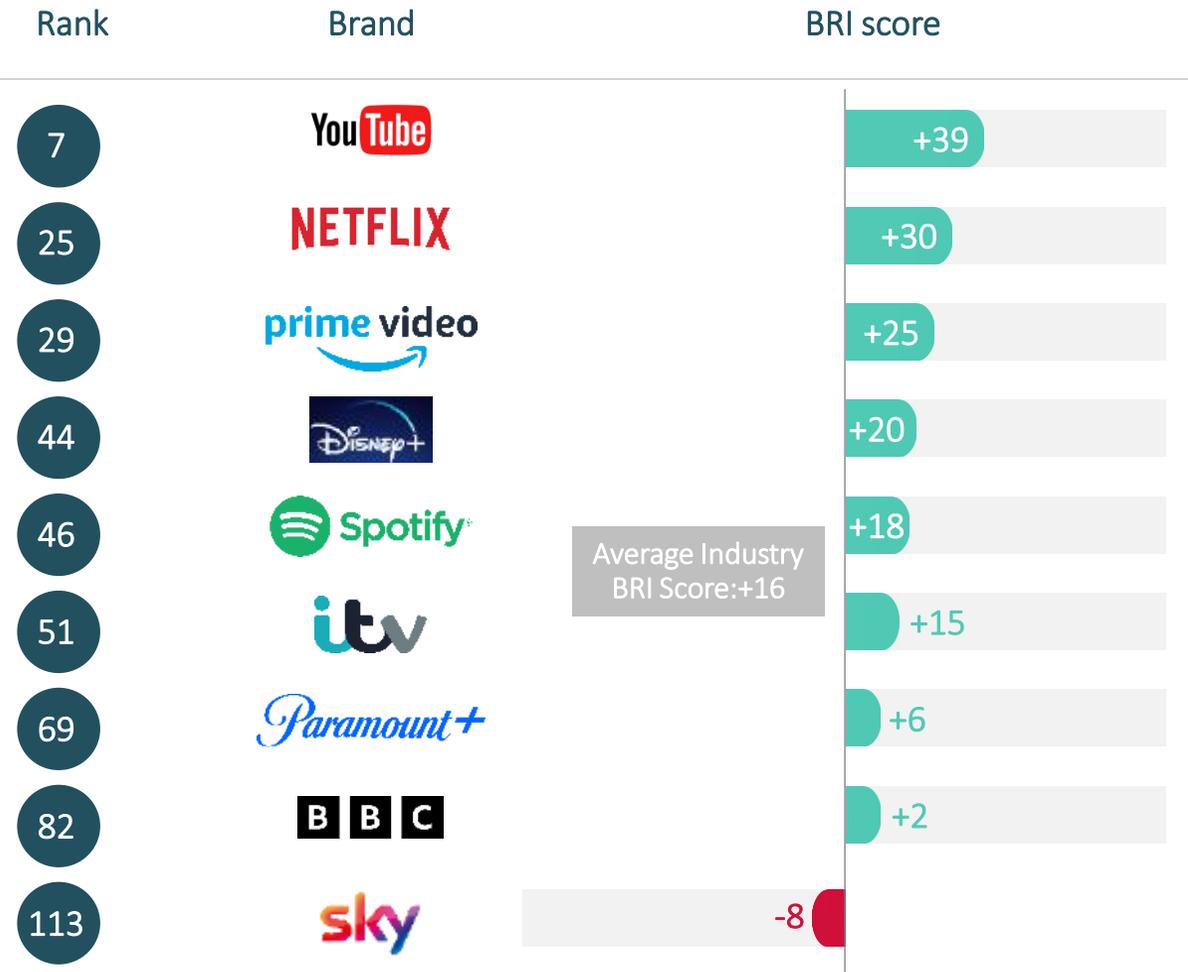
# Social Media

Instagram is the only brand with a positive BRI in the category, mostly driven by Gen Z's emotional connection



# SVOD & Entertainment

YouTube, Netflix and Amazon Prime dominate the category while Sky is the only brand with negative BRI



# Technology

Samsung makes it to the top 10 overall, while LG and Apple rank within the top 50 brands in the UK

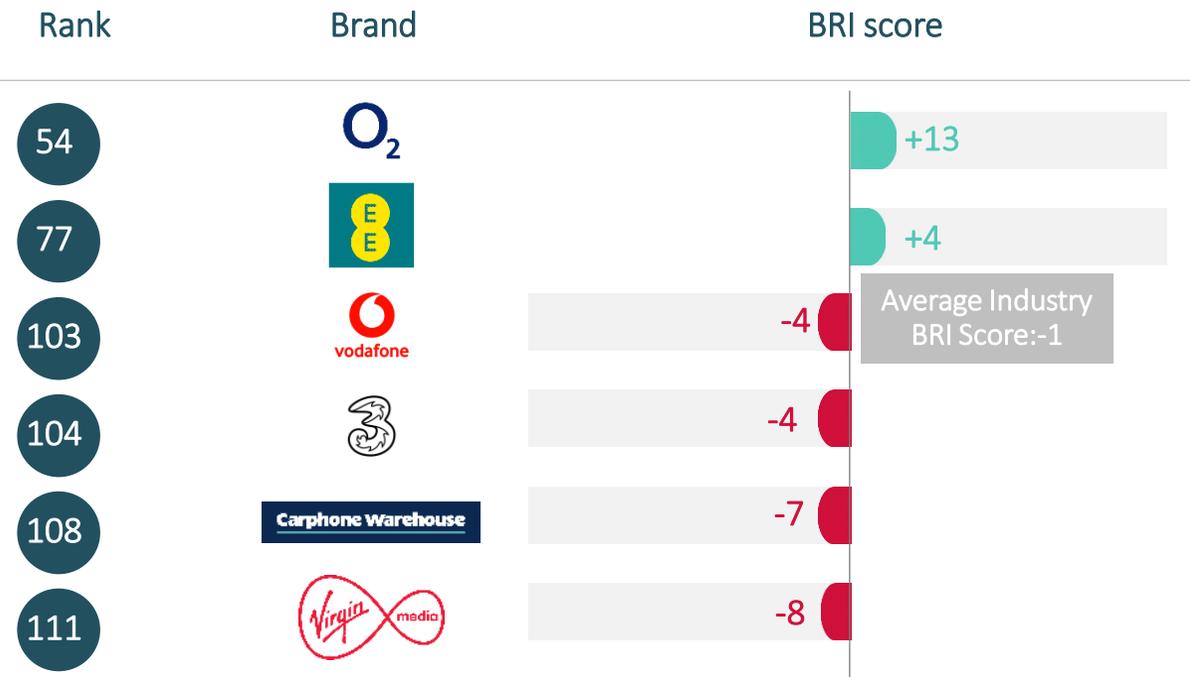
Rank	Brand	BRI score
10	<b>SAMSUNG</b>	+38
34	<b>LG</b>	+23
50	<b>Apple</b>	+15

Average Industry BRI Score: +25



# Telecoms

O2 and EE generate positive emotional connection while all other brands struggle to reach a neutral score



# Travel



Eurostar and Jet2holidays lead the category while Ryanair generate very negative emotion, ranking 3<sup>rd</sup> last on BRI



# 5

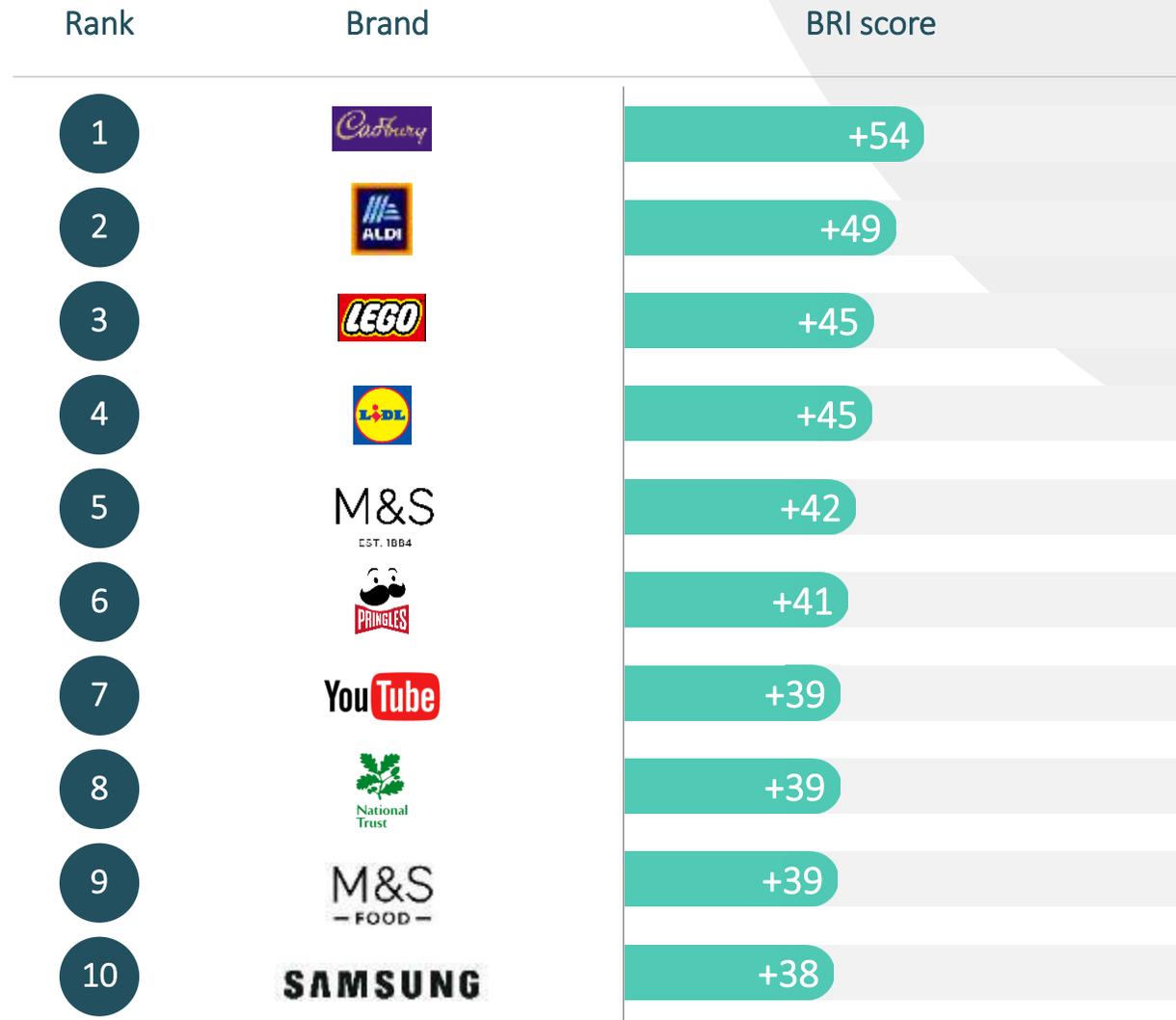
How do the 128 brands in the test performed against each other?



# UK's Most Emotionally Connected Brands

The brands that have most successfully fostered emotional connections are Cadbury, Aldi and Lego.

Consumers across generations are emotionally connected to Cadbury which has also retained its top spot ranking in RED C's BRI survey in Ireland. Initiatives such as Cadbury's latest campaign, that cleverly uses storytelling of small acts of kindness aligned with the recognisable slogan 'there's a glass and a half in everyone', supports this intergenerational success.



# UK's Most Emotionally Connected Brands: Rank 11-30



Rank	Brand	BRI score
11		+36
12		+36
13		+36
14		+35
15	<b>Iceland</b>	+35
16	<b>MONEYSUPERMARKET</b>	+35
17		+34
18		+34
19		+34
20	<b>Sainsbury's</b>	+33

Rank	Brand	BRI score
21		+33
22		+32
23		+32
24		+32
25	<b>NETFLIX</b>	+30
26		+28
27		+28
28		+27
29		+25
30		+25

# UK's Most Emotionally Connected Brands: Rank 31-50



Rank	Brand	BRI score
31		+25
32		+24
33		+24
34		+23
35		+23
36		+22
37		+21
38		+20
39		+20
40		+20

Rank	Brand	BRI score
41		+20
42		+20
43		+20
44		+20
45		+19
46		+18
47		+17
48		+16
49		+16
50		+15



# UK's Most Emotionally Connected Brands: Rank 51 – 70



Rank	Brand	BRI score
51		+15
52		+14
53		+13
54		+13
55		+12
56		+12
57		+12
58		+11
59		+11
60		+10

Rank	Brand	BRI score
61		+9
62		+9
63		+8
64		+8
65		+7
66		+7
67		+6
68		+6
69		+6
70		+5

# Most Emotionally Connected Brands: Rank 71 – 90



Rank	Brand	BRI score
71	RIVER ISLAND	+5
72	THE NATIONAL LOTTERY	+5
73	virgin atlantic	+4
74	BRITISH AIRWAYS	+4
75	THE ORIGINAL OATLY!	+4
76	ASOS	+4
77	EE	+4
78	SUPERDRY® 冒險魂	+4
79	easyJet	+4
80	XBOX	+3

Rank	Brand	BRI score
81	LLOYDS BANK	+3
82	BBC	+2
83	STARBUCKS	+2
84	Instagram	+2
85	ocado	+2
86	TSB	+1
87	asics	+1
88	very	+1
89	★ PRET A MANGER ★	+0
90	Heathrow	0

# Most Emotionally Connected Brands: Rank 91 – 110



Rank	Brand	BRI score
91	GYMSHARK	-1
92	Bank of Ireland	-1
93	HSBC	-1
94	NatWest	-1
95	AXA	-2
96	Strings & Things	-2
97	Quorn	-2
98	BARCLAYS	-3
99	Aer Lingus	-3
100	nationalgrid	-3

Rank	Brand	BRI score
101	UGG	-4
102	Revolut	-4
103	vodafone	-4
104	3	-4
105	deliveroo	-4
106	MINECRAFT	-6
107	LinkedIn	-7
108	Carphone Warehouse	-7
109	boohoo	-7
110	INSTAVOLT	-7

# Most Emotionally Connected Brands: Rank 111 – 128



Rank	Brand	BRI score
111		-8
112		-8
113		-8
114		-9
115		-11
116		-12
117		-13
118		-13
119		-17
120		-20

Rank	Brand	BRI score
121		-20
122		-22
123		-26
124		-27
125		-28
126		-28
127		-29
128		-31



If you'd like to know more, please don't hesitate to contact us – our email details are overleaf...

# THANK YOU

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