

REDC



Brand Reaction Index 2025 UK Results

3rd Wave



Why & How do we test emotional connection?

Which brands have the strongest emotional connection with consumers?

How have the scores changed since 2023 and 2024?

134
brands

13
sectors

3rd
wave

RED C's Brand Reaction Index (BRI) methodology is rooted in key behavioural science principles



“*Humans make ‘fast and frugal’ decisions to arrive at ‘good enough’ choices*”

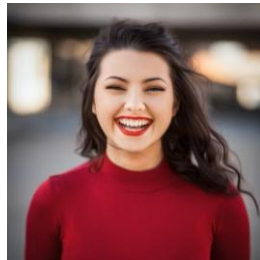
- Gerd Gigerenzer, Behavioural Economist

The three shortcuts used to arrive at ‘good enough’ choices are:



Availability
Heuristic

The brand easily comes to mind



Affect Heuristic

The brand evokes positive feelings



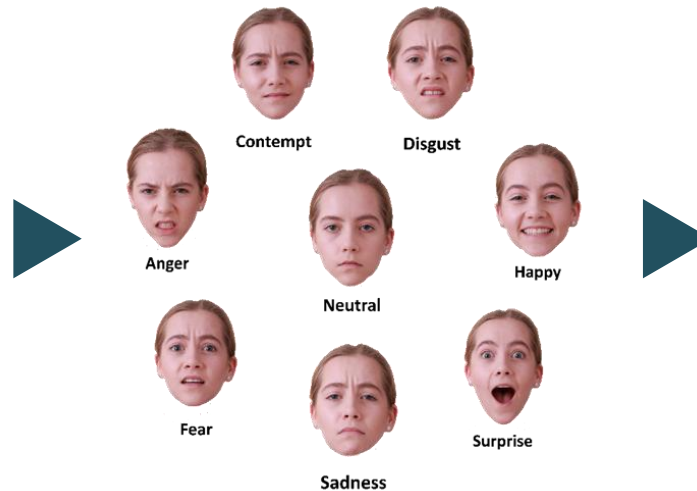
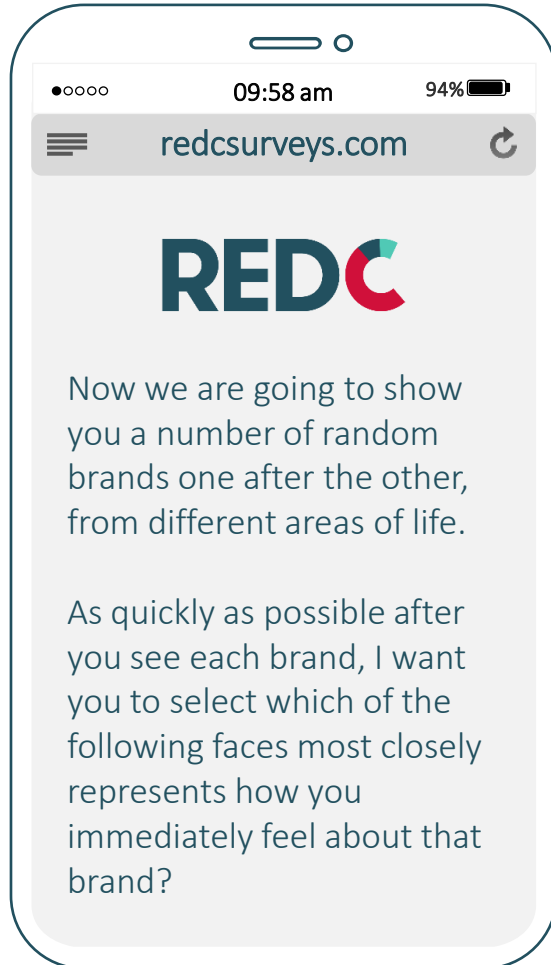
Processing
Fluency Heuristic

The brand is easily recognised in-store/online, etc

The BRI methodology captures how consumers feel about brands



How is it asked?



Each respondent answered the question for ~30 brands

How is it calculated?

- The BRI score is then calculated for each brand:

$$\begin{array}{lcl} \text{\% Positive Emotion} & - & \text{\% Negative Emotions} \\ \text{\textit{(Happy)}} & & \text{\textit{(Contempt, Disgust, Anger, Fear, Sadness)}} \end{array} = \text{BRI score}$$

(Scores range from +100 to -100)

Neutral and Surprise are considered 'neutral' and are not included in the final score

- Where ties have occurred, we look at the results to two decimal places to break the tie
- The report analyses the BRI result at both a total level and at an industry/sector level among brands tested. We have also looked at results amongst different generations e.g. Baby Boomers, Gen Z, Millennials

This year's BRI report includes results from 13 different sectors

Financial services



FMCG



Food outlets



Gaming / Toys



Groceries



Infrastructure & Energy



Out of town retailers & Online marketplaces



Retailers



Social media



SVOD & Entertainment



Technology



Telecoms



Travel



Top UK brands amongst all UK consumers

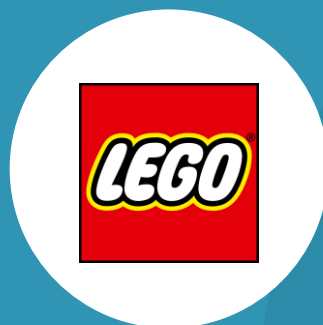
Top 10 UK brands – All respondents



+53



+52



+51



+46



+45



+45



+41



+40



+39



+39

Cadbury

retakes its crown this year after last years' winner Lego saw scores decline by 3 points since 2024...

	2023	2024	2025
Score	+53	+53	+54
Rank	1 st	2 nd	1 st

... but M&S Food is very close behind as it managed to reinvent itself and generate strong emotional connection



Clear, effective positioning

1



- Premium quality
- Innovative products to remain relevant
- Emphasis on provenance and ethics

Successful advertising

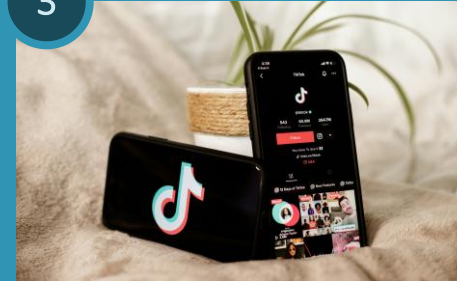
2



- Use effective classic narratives
- Re-vitalised old advertising campaign

M&S' social media success

3



- 'Native' content on platforms like TikTok
- Turn trends into products e.g. viral strawberry sandwich

Deeply embedded trust

4



- Huge recent cyber attack did not affect M&S or M&S Food scores

Top performing UK brands play on at least one of the following elements - if not all!



Heritage

1



- Established brands
- Generational significance
- Evoke shared memories

Value

2



- Cost-effective products
- 'Surprise and delight' with quality
- Appeal to budget-conscious consumers

'Everyday heroes'

3



- Part of consumers everyday routines
- Reliable: consistent value and quality
- Here in emotional 'small moments'

Nostalgia

4



- Timeless brands
- Nostalgic memories from childhood or traditions

Comfort escapism

5



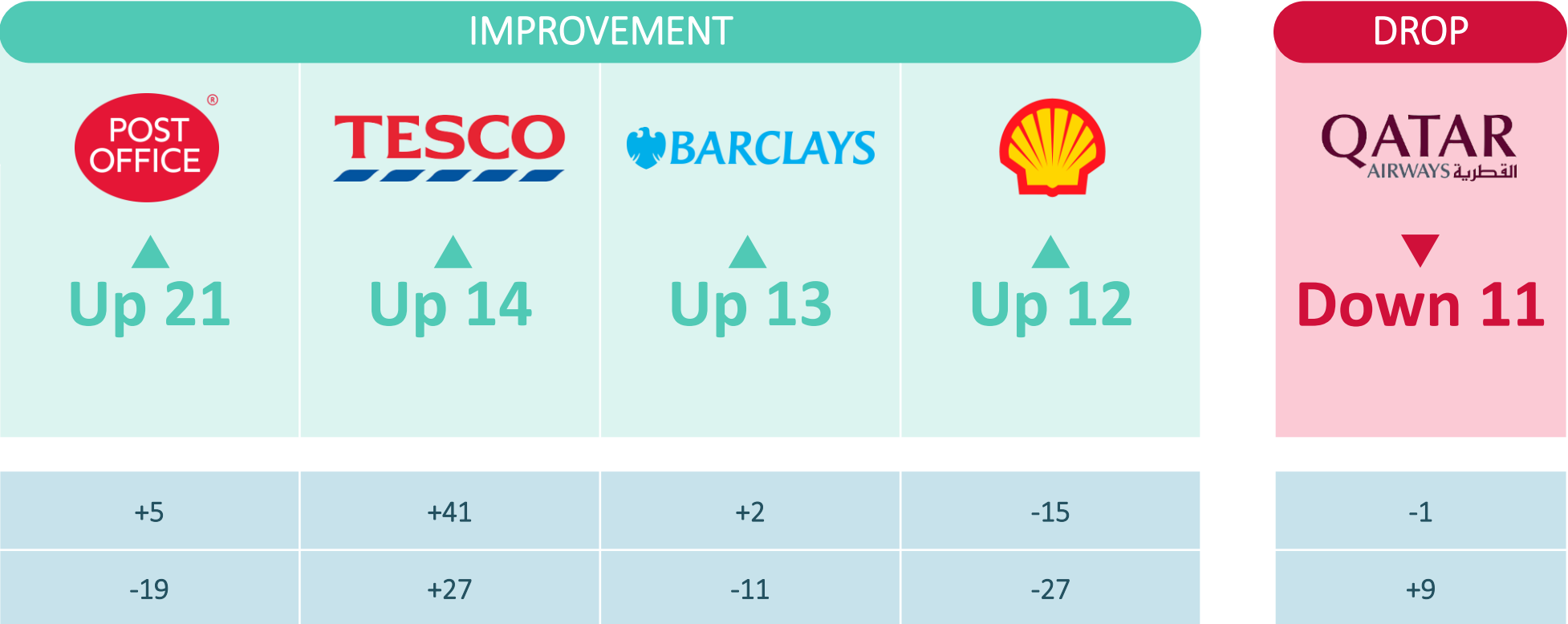
- Create emotionally positive spaces
- Help disconnect from stress

Value is particularly
key as 3 in 5 UK
consumers expect
to have less
disposable income
in the next 6
months (60%)

Overall, BRI scores have remained relatively stable vs 2024, but some brands have seen big movements...



2025 vs
2024
points shift



Top UK brands amongst generations

Gen Z: 'Comfort meets culture' brands help Gen Z refine their sense of identity



+50



+48



+45



+45



+45



+43



+42



+41



+38



+37

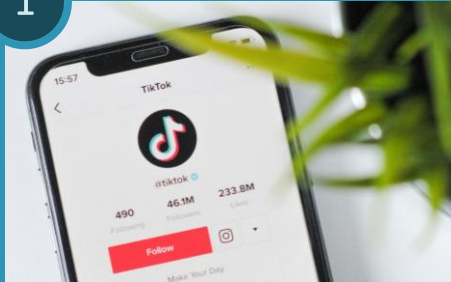


Nando's blend of affordability, culture and personality makes it one of **Gen Z**'s favourites



Cultural currency & Memes

1



- Speaks *with* Gen Z, not *at* them
- Part of the Gen Z digital lexicon (e.g. “cheeky Nando’s”)

Affordable treats that feel premium

2



- Affordable yet feels like a “proper meal out”
- Straightforward loyalty scheme

Gather around menu flexibility

3



- Caters for all type of diets (e.g. halal, vegan)
- Works for all occasions (e.g. date)

Successful offline- online bridge

4



- Simple yet aesthetic restaurants designs
- Music partnerships
- User-generated content

Millennials: Modern, emotionally anchored and practical brands drive connection with Millennials



NETFLIX

+56

Cadbury

+56



+47

YouTube

+46

HEINZ
ESTD 1869

+44



+44



+41

M&S
— FOOD —

+40

Dunelm

+39



+38



Millennials have a particular emotional attachment to Netflix



Digital natives with disposable £££

1



- In their peak earning years
- Most likely to have streaming services (vs other generations)

Values-reflective content

2



- Diversity, mental health, social justice, etc
- Authentic storytelling

Nostalgia-driven originals & classics

3



- Vintage revival
- Content from the 80s, 90s and 2000s (either original or 'classic')

Offline and online social buzz

4



- Part of the cultural conversation
- Feeling of shared experience

NETFLIX

Familiar, functional and meaningful brands do best amongst **Gen X**



+58



+58



+56



+54



+52



+52



+51



+48



+47



+44



Legacy and loyalty brands that help them live well connect best with **Baby Boomers**



+62



+60



+60



+54



+50



+50



+50



+50



+49



+49



Dunelm offers real-world value, timeless practicality and quiet reassurance for **Millennials** and **Baby Boomers** in particular



Practicality over hype

1



- Things people actually need with useful designs
- Functional yet stylish comfort

Value without compromise

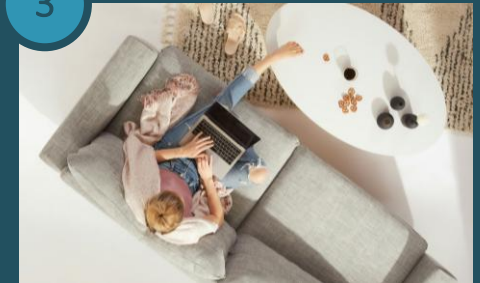
2



- Appeals to both groups for different reasons
- Reputation for reliability, good service and fair price

Home as an emotional anchor

3



- Post-covid views on 'home'
- Millennials are nesting while Boomers are refreshing/ downsizing

Everyday heroes that earn a place at the family table do best among **Parents of kids 18 and under**



NETFLIX

+65

Cadbury

+62



+54



+53

SAMSUNG

+47

Kellogg's

+47



+46



+45

YouTube

+45

GREGGS

+43



Greggs' family-friendly and ever-evolving offer is key in winning over **Parents of kids under 18**



Affordable and family-friendly

1



- Low-cost, filling food
- Seen as good value and everyday treats
- Familiarity

Iconic & inclusive products

2



- Sausage rolls or vegetarian alternatives
- 'Something for everyone'

Ever-evolving offer

3



- Expanding range and offer into for e.g. evening trading, hot food or partnerships with delivery platform

Millennials parents of kids 18 and under like smart, savvy and nostalgic brands



+65



+59



+49



+48



+46



+46



+45



+45



+44



+43



Vinted connects with **Millennial parents** by turning second-hand into a smart, satisfying, and sustainable solution



Smart platform for stretched budgets

1



- Helps with fast-changing costs associated with kids
- Can earn and save simultaneously

Guilt-free sustainability

2



- Eco-conscious parents
- Makes it easy to act sustainably

Decluttering as self-care

3



- Helps parents feel in control of their space
- Clear space while earning money

Feel-good community vibes

4



- More casual, peer-to-peer tone
- Supportive side-hustle for some Millennial mums

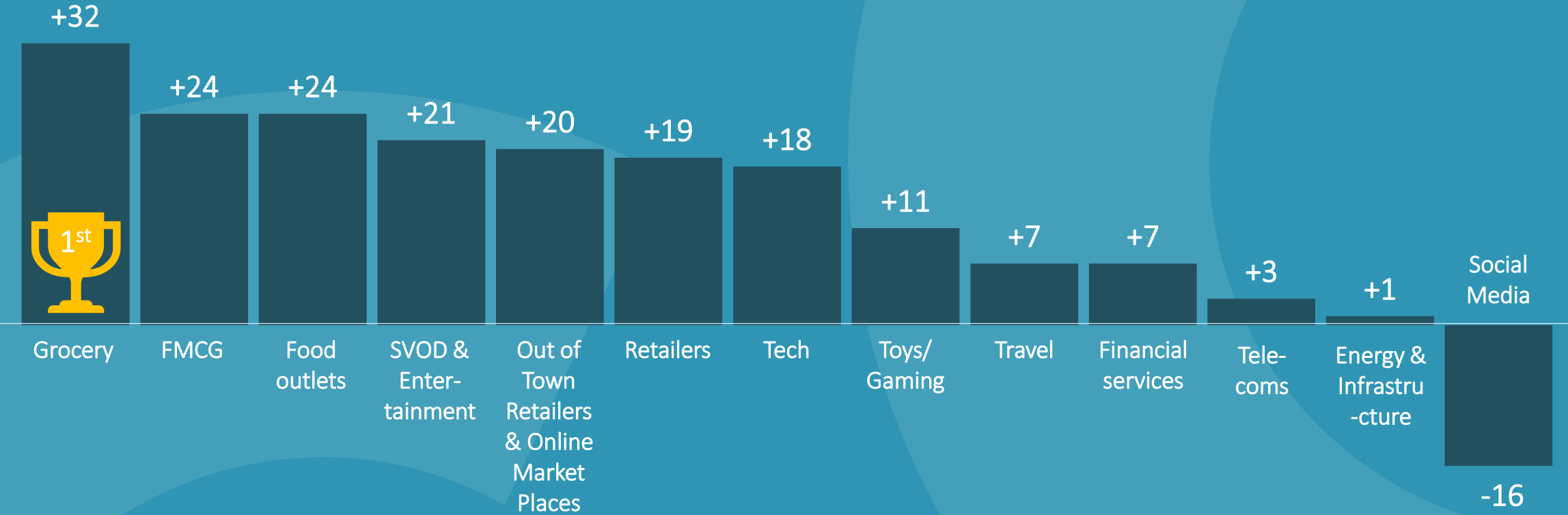
Vinted

UK results by sector

Grocery, FMCG and Food Outlets brands generate the strongest emotional connection



Average BRI score by category




Source: RED C UK 2025 BRI survey
Base: All respondents (n=519-522) per brand



Groceries: M&S Food dominates the sector alongside discount supermarkets



Rank	Brand	BRI score	Movement	
			vs '23	vs '24
2	M&S - FOOD -	+52	+14	+9
5	ALDI	+45	-4	+3
7	TESCO	+41	+7	+14
8	LIDL	+40	-5	-7
11	Sainsbury's	+38	+5	-1
27	Iceland	+30	-6	-3
41	ASDA	+24	-8	-1
46	Morrisons	+23	-9	-2
50	Waitrose	+21	+4	-
75	Cocado	+10	+8	-2

Reminder: 

Groceries category ranks #1 on average BRI score and half the brands make it to the top 20.

This is likely due to a mix of 'everyday heroes', long-standing relationship with the brands, and most importantly in the category: value perceptions

Cat avg: +32





4 in 10 UK
consumers expect
their spending on
groceries to
increase in the next
6 months



FMCG brands generate strong emotional connection - 2 new entrants even make it to the top 50



Rank	Brand	BRI score	Movement		Rank	Brand	BRI score	Movement	
			vs '23	vs '24				vs '23	vs '24
1	Cadbury	+53	-1	-1	78	PRIMULA	+8	n/a	n/a
13	WALKERS	+38	+1	-6	101	Kraft	+3	+3	-
14	HEINZ	+38	+13	+4	108	Cheestrings	0	n/a	n/a
15	Kellogg's	+37	+3	-1	110	Charlie Bigham's	-1	n/a	-3
16	HULA HOOPS	+37	+1	+1					
22	McCOY'S	+33	n/a	n/a					
37	Nestlé	+25	n/a	n/a					
40	Tyrrell's	+25	+4	-2					
42	Babybel	+24	-1	-					
57	Coca-Cola	+17	n/a	-5					

Source: RED C UK 2025 BRI survey
Base: All respondents (n=519-522) per brand

★ New brand for 2025




+xx/-xx At least +/- 5pp movement on score

Cat avg: +24

Some movement is +/- 5pp on the slide but not highlighted – this is due to rounding



Greggs dominates the Food Outlets sector

Rank	Brand	BRI score	Movement	
			vs '23	vs '24
23	 GREGGS	<div><div>+32</div></div>	-2	n/a
39	 Nando's	<div><div>+25</div></div>	+5	+5
65		<div><div>+14</div></div>	-	+1



★ New brand for 2025 +xx/-xx At least +/- 5pp movement on score

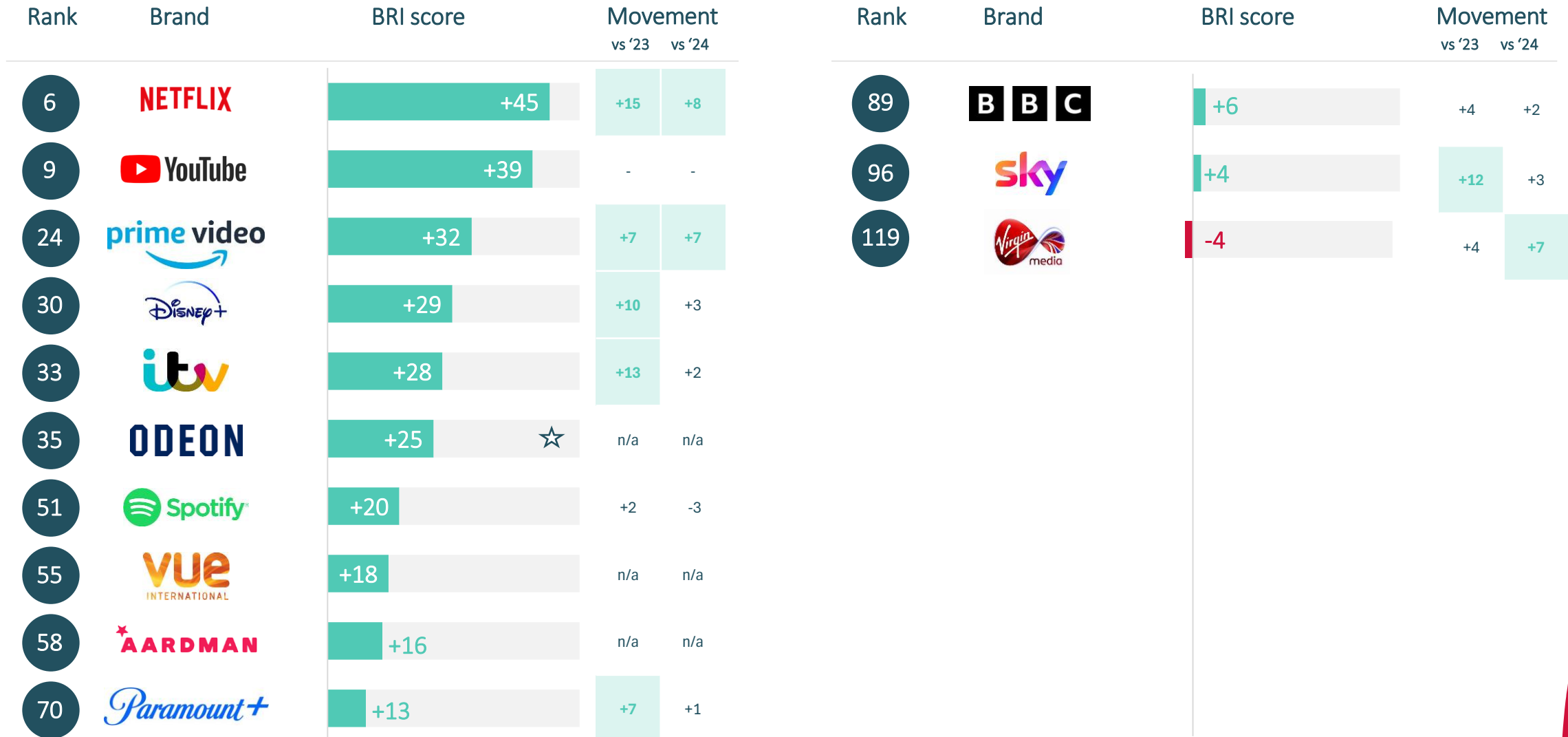
Source: RED C UK 2025 BRI survey
Base: All respondents (n=519-522) per brand

Cat avg: +24

Some movement is +/- 5pp on the slide but not highlighted – this is due to rounding 31



SVOD & Entertainment: Streaming services have very strong emotional connection and observe gains vs previous years



Source: RED C UK 2025 BRI survey
Base: All respondents (n=519-522) per brand

★ New brand for 2025

+xx/-xx At least +/- 5pp movement on score

Cat avg: +21

Some movement is +/- 5pp on the slide but not highlighted – this is due to rounding



Out of Town Retailers & Online Market Places: Ikea, Dunelm and Amazon comfortably lead in the sector



Rank	Brand	BRI score	Movement vs '23 vs '24		Rank	Brand	BRI score	Movement vs '23 vs '24	
17		+35	-	-	73		+12	-9	-5
20		+34	+6	-2	85		+7	n/a	-2
21		+34	+2	-	121		-5	n/a	-1
26		+30	+3	+5					
28		+30	n/a	-1					
43		+24	-	-2					
49		+21	-7	+2					
56		+17	+1	-					
61		+16	-4	-2					
72		+12	-8	-6					

Source: RED C UK 2025 BRI survey
Base: All respondents (n=519-522) per brand



New brand for 2025

+xx/-xx At least +/- 5pp movement on score

Cat avg: +20

Some movement is +/- 5pp on the slide but not highlighted – this is due to rounding



Retailers: M&S ranks 10th overall, and the new entrant Specsavers makes it into the top 50



Rank	Brand	BRI score	Movement vs '23 vs '24		Rank	Brand	BRI score	Movement vs '23 vs '24	
10	M&S	+39	-3	-7	84	ZARA	+7	-2	-1
18	John Lewis	+35	n/a	-	88	ASOS	+6	+2	+1
19	Waterstones	+34	n/a	-6	92	very.co.uk	+5	+4	+3
29	adidas	+29	+9	+2	113	depop	-2	n/a	+6
32	next	+28	+4	+4					
38	Vinted	+25	n/a	+7					
48	Specsavers	+21	n/a	n/a					
52	Nike	+19	+3	-1					
54	H&M	+18	+5	-2					
81	Superdry	+7	+3	-					

Source: RED C UK 2025 BRI survey
Base: All respondents (n=519-522) per brand





☆ New brand for 2025

+xx/-xx At least +/- 5pp movement on score

Cat avg: +19

Some movement is +/- 5pp on the slide but not highlighted – this is due to rounding

Samsung is the lead brand in the Technology sector, way ahead of competitor Apple

Rank	Brand	BRI score	Movement	
			vs '23	vs '24
4		<div><div>+46</div></div>	+8	+9
34		<div><div>+27</div></div>	+4	+7
62		<div><div>+15</div></div>	-	+3
126	 ChatGPT	<div><div>-15</div></div>	n/a	+1

Samsung almost only generate positive emotions (50% positive and only 4% negative), while Apple is more polarising (37% positive and 21% negative)

★ New brand for 2025 +xx/-xx At least +/- 5pp movement on score

Source: RED C UK 2025 BRI survey
Base: All respondents (n=519-522) per brand

Cat avg: +18
















Some movement is +/- 5pp on the slide but not highlighted – this is due to rounding 35



Gaming/toys: Lego remains the undisputed leader while Fortnite, Roblox and Minecraft struggle more



Rank	Brand	BRI score	Movement vs '23 vs '24		Rank	Brand	BRI score	Movement vs '23 vs '24	
3		<div><div>+51</div></div>	+6	-3	114		<div><div>-2</div></div>	+4	-
36		<div><div>+25</div></div>	n/a	-4	118		<div><div>-4</div></div>	+8	+1
47		<div><div>+21</div></div>	+8	+8	125		<div><div>-12</div></div>	+8	+8
67		<div><div>+13</div><div>☆</div></div>	n/a	n/a					
69		<div><div>+13</div><div>☆</div></div>	n/a	n/a					
74		<div><div>+12</div><div>☆</div></div>	n/a	n/a					
82		<div><div>+7</div></div>	n/a	-2					
86		<div><div>+6</div></div>	+3	-6					
87		<div><div>+6</div><div>☆</div></div>	n/a	n/a					
94		<div><div>+5</div><div>☆</div></div>	n/a	n/a					

Source: RED C UK 2025 BRI survey
Base: All respondents (n=519-522) per brand

☆ New brand for 2025 +xx/-xx At least +/- 5pp movement on score

Cat avg: +11

Some movement is +/- 5pp on the slide but not highlighted – this is due to rounding



Jellycat: something for everyone

Our Brand Reaction Index and Families@Home project reveal strong brand affinity, especially amongst Gen Z



- Soft staple toy to own from birth
- Popular until 18, and beyond!
- Animal and food plush toys are popular
- Huge success of pop-ups
- TikTok buzz
- Pop ups prove power of experiential





Jet2holidays, Eurostar and TUI lead the Travel sector, all up vs 2023, while Qatar Airways observes sharp declines



Rank	Brand	BRI score	Movement vs '23 vs '24		Rank	Brand	BRI score	Movement vs '23 vs '24	
44	Jet2holidays	+23	+12	+1	111	QATAR AIRWAYS الخطوط القطرية	-1	n/a	-11
53	eurostar	+18	+6	+3	124	W!ZZ	-8	n/a	+1
59	TUI	+16	+8	-1	129	RYANAIR	-19	+10	+1
60	Emirates	+16	n/a	+1					
63	BRITISH AIRWAYS	+15	+11	-3					
66	virgin atlantic	+14	+9	-2					
76	easyJet	+9	+6	+6					
104	Aer Lingus	+2	+5	+3					
105	LONDON GATWICK	+1	+1	-3					
107	Heathrow Making every journey better	+0	+1	-2					



Holidays and travel are key moments for families

Our Families@Home project highlights the importance of family holidays, even in times of economic uncertainty

46% of parents consider saving for holidays is a priority



vs 30% of non-parents

Families make sure they put money aside for holidays

- Something to look forward to, even when money is tight
- Provides escapism
- Lockdown(s) made families realise how important holidays are

Holidays have been the highlight of the P12M

- Often with wider family members
- Activities that bring families together
- Creating memories through moments of joy





Financial Services ranking remains similar to 2024, but Post Office and Barclays see biggest uplifts vs last year



Rank	Brand	BRI score	Movement vs '23 vs '24		Rank	Brand	BRI score	Movement vs '23 vs '24	
25	MONEYSUPERMARKET	+31	-4	-3	99	Revolut	+3	+6	+3
31	nationwide	+29	+7	+4	100	T S B	+3	+2	+2
68	AVIVA	+13	+7	+2	102	POST OFFICE	+2	-21	+21
77	COVENTRY Building Society	+8	n/a	n/a	103	BARCLAYS	+2	+5	+13
79	first direct	+8	-	-2	117	HSBC	-3	-2	+4
80	monzo	+7	n/a	-1	120	Bank of Ireland	-4	-3	-
83	Leeds Building Society	+7	n/a	+2					
93	NatWest	+5	+6	+6					
95	AXA	+4	+6	+2					
97	LLOYDS BANK	+4	+1	-					

Source: RED C UK 2025 BRI survey
Base: All respondents (n=519-522) per brand

☆ New brand for 2025

+xx/-xx At least +/- 5pp movement on score

Cat avg: +7

Some movement is +/- 5pp on the slide but not highlighted – this is due to rounding



Zoom on MoneySuperMarket, the sector leader, and Post Office, coming back from a dip in 2024



MONEYSUPERMARKET

Category leader: the importance of educational content and empowerment

- Remains a well-loved brand, driven by a high **Happy** score (38%) and little negativity (net: 4%)
- Consumers are more value-conscious than ever and the platform's transparency helps them feel **empowered in financial decisions**
- **Educational approach** builds brand credibility and positions them as a trusted advisor



Biggest improvement since 2024: the impact of scandals on emotional connection

- BRI score plummeted over 40 points due to **Horizon IT scandal** back in 2024, driven by high Anger (12%) and Disgust (11%) scores
- **In 2025**, its BRI recovered, from -19 last year to +2. The 2 **strong negative emotions have halved**, reaching 6% respectively, and BRI score is back to 2023 level (1st wave)
- **News can affect heavily**, but established brands can recover





Telecoms have low emotional connection, but O2, BT and Virgin sees an uplift vs 2024



Rank	Brand	BRI score	Movement	
			vs '23	vs '24
64	O ₂	+15	+2	+6
91	E _E	+6	+2	+4
96	sky	+4	+12	+3
98	vodafone	+4	+7	-
112	3	-2	+2	-1
115	BT	-3	+10	+5
119	Virgin media	-4	+4	+7

★ New brand for 2025 +xx/-xx At least +/- 5pp movement on score

Source: RED C UK 2025 BRI survey
Base: All respondents (n=519-522) per brand











Cat avg: +3

Some movement is +/- 5pp on the slide but not highlighted – this is due to rounding 42



Infrastructure & Energy: several brands see year-on-year consistent improvement



Rank	Brand	BRI score	Movement	
			vs '23	vs '24
12	 National Trust	+38	-1	-4
45	 octopus energy	+23	+17	+5
71	 THE NATIONAL LOTTERY	+13	+8	+6
106	 ovo energy	+1	+12	+4
109	 Royal Mail	0	-7	+8
116	 edf ENERGY	-3	+19	+7
123	 THE CROWN ESTATE	-8	-	-
127	 Shell	-15	+16	+12
132	 bp	-20	+8	+8
133	 British Gas	-20	+9	-3

Cat avg: +1

Source: RED C UK 2025 BRI survey
Base: All respondents (n=519-522) per brand

★ New brand for 2025







+xx/-xx At least +/- 5pp movement on score

Some movement is +/- 5pp on the slide but not highlighted – this is due to rounding



Social media brands generate a lot of negativity, making it the least emotionally connected sector



Rank	Brand	BRI score	Movement	
			vs '23	vs '24
90		+6	+4	+7
122		-5	+2	+6
128		-16	-3	-5
130		-20	-	+2
131		-20	+7	+3
136		-38	n/a	-10



☆ New brand for 2025 +xx/-xx At least +/- 5pp movement on score

Source: RED C UK 2025 BRI survey
Base: All respondents (n=519-522) per brand

Cat avg: -16



Unsurprisingly, Social media brands connect best with younger audiences



Gen Z



Millennials



Gen X



Baby Boomers



Average
sector BRI
score:

-2

-15

-16

-21

This report has only scratched the surface of the data we have – get in touch to find out what is driving your brand's BRI score!

GET IN TOUCH

info@redcresearch.com



Richard Barton
Léa Trichet