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

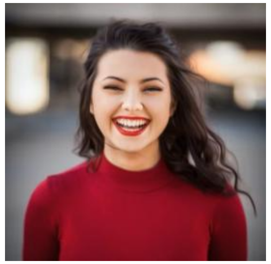
3rd
wave

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?

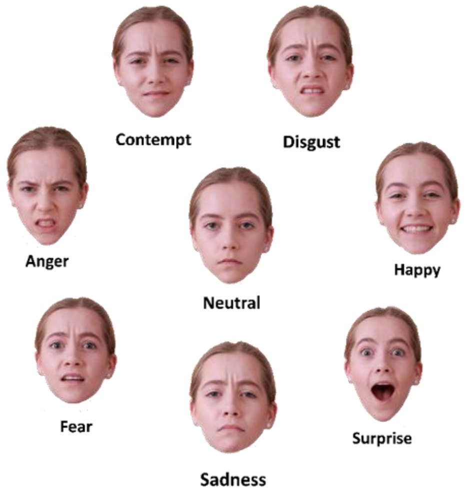
09:58 am 94%

redcsurveys.com

REDC

Now we are going to show you a number of random brands one after the other, from different areas of life.

As quickly as possible after you see each brand, I want you to select which of the following faces most closely represents how you immediately feel about that brand?



Each respondent answered the question for ~30 brands

How is it calculated?

- The BRI score is then calculated for each brand:

% Positive Emotion	–	% Negative Emotions	=	BRI score
(Happy)		*(Contempt, Disgust, Anger, Fear, Sadness)*		*(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, Millenials

Fieldwork was conducted from June 5th to 8th 2025 by YONDER

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

Cadbury	+53
M&S FOOD	+52
LEGO	+51
SAMSUNG	+46
ALDI	+45
NETFLIX	+45
TESCO	+41
LIDL	+40
YouTube	+39
M&S	+39

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

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	1st	2nd	1st

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

M&S — FOOD —

1 Clear, effective positioning

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

2 Successful advertising

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

3 M&S' social media success

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

4 Deeply embedded trust

- 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

Source: RED C UK 2025 BRI survey

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

Source: RED C UK April 2025 Consumer Mood Monitor
Base: All respondents Apr 25 (n=2,071)

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

2025 vs 2024 points shift	IMPROVEMENT				DROP
	Post Office	Tesco	Barclays	Shell	Qatar Airways
	▲ Up 21	▲ Up 14	▲ Up 13	▲ Up 12	▼ Down 11
2025 BRI score	+5	+41	+2	-15	-1
2024 BRI score	-19	+27	-11	-27	+9

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

Top UK brands amongst generations

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

M&S FOOD	Nando's	IKEA	Spotify	TESCO
+50	+48	+45	+45	+45
Disney+	YouTube	NETFLIX	ALDI	Cadbury
+43	+42	+41	+38	+37

Source: RED C UK 2025 BRI survey
Base: Gen Z (n=46-91) per brand

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
LEGO	+47
YouTube	+46
HEINZ	+44
ALDI	+44
LIDL	+41
M&S FOOD	+40
Dunelm	+39
McCOY'S	+38

Source: RED C UK 2025 BRI survey
Base: Millennials (n=109-146) per brand

Millennials have a particular emotional attachment to Netflix

1 Digital natives with disposable £££

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

2 Values-reflective content

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

3 Nostalgia-driven originals & classics

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

4 Offline and online social buzz

- Part of the cultural conversation
- Feeling of shared experience

Millennials are more likely to have kids, which might also explain their attachment to brands like Netflix or Lego

Familiar, functional and meaningful brands do best amongst Gen X

LEGO	+58
HULA HOOPS	+58
M&S FOOD	+56
SAMSUNG	+54
Cadbury	+52
National Trust	+52
Waterstones	+51
Kellogg's	+48
NETFLIX	+47
Sainsbury's	+44

Source: RED C UK 2025 BRI survey
Base: Gen X (n=116-175) per brand

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

M&S FOOD	Cadbury	SAMSUNG	LEGO	John Lewis
+62	+60	+60	+54	+50
Kellogg's	nationwide	M&S	Dunelm	ALDI
+50	+50	+50	+49	+49

Source: RED C UK 2025 BRI survey
Base: Baby Boomers (n=131-172) per brand

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	Cadbury	LEGO	ALDI	Samsung
+65	+62	+54	+53	+47

Kellogg's	Lidl	Walkers	YouTube	Greggs
+47	+46	+45	+45	+43

Source: RED C UK 2025 BRI survey
Base: Parents of kids 18 and under (n=120-161) per brand

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

GREGGS

1 Affordable and family-friendly

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

2 Iconic & inclusive products

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

3 Ever-evolving offer

- 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

Cadbury	Netflix	Kellogg's	Lidl	Aldi
+65	+59	+49	+48	+46

LEGO	Vinted	Samsung	B&Q	Walkers
+46	+45	+45	+44	+43

Source: RED C UK 2025 BRI survey
Base: Millennials parents of kids 18 and under (n=47-85) per brand

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

Vinted

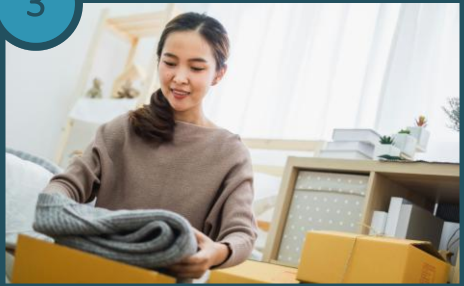
1 Smart platform for stretched budgets

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

2 Guilt-free sustainability

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

3 Decluttering as self-care



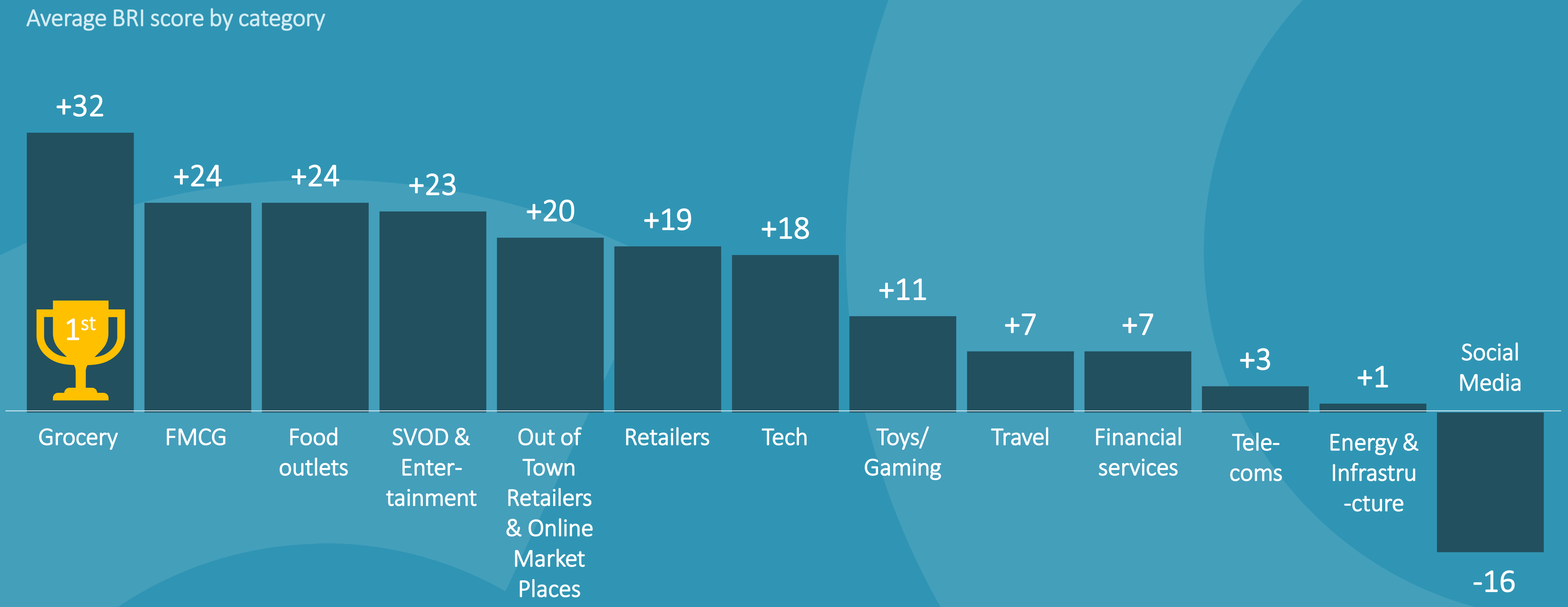
- Helps parents feel in control of their space
- Clear space while earning money

4 Feel-good community vibes

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

UK results by sector

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



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	Movement 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	ocado	+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

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

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

Source: RED C UK April 2025 Consumer Mood Monitor
Base: All respondents Apr 25 (n=2,071)

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

Rank	Brand	BRI score	Movement vs '23	Movement vs '24
1	Cadbury	+53	-1	-1
13	Walkers	+38	+1	-6
14	Heinz	+38	+13	+4
15	Kellogg's	+37	+3	-1
16	Hula Hoops	+37	+1	+1
22	McCoy's	+33 ☆	n/a	n/a
37	Nestlé	+25 ☆	n/a	n/a
40	Tyrrells	+25	+4	-2
42	Babybel	+24	-1	-
57	Coca-Cola	+17	n/a	-5

Rank	Brand	BRI score	Movement vs '23	Movement vs '24
78	Primula	+8 ☆	n/a	n/a
101	Kraft	+3 ☆	+3	-
108	Cheestrings	0	n/a	n/a
110	Charlie Bigham's	-1	n/a	-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: +24

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

Greggs dominates the Food Oulets sector

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

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

Rank	Brand	BRI score	Movement vs '23	Movement vs '24
6	NETFLIX	+45	+15	+8
9	YouTube	+39	-	-
24	prime video	+32	+7	+7
30	Disney+	+29	+10	+3
33	itv	+28	+13	+2
35	ODEON	+25 ☆	n/a	n/a
51	Spotify	+20	+2	-3
55	vue INTERNATIONAL	+18	n/a	n/a
58	AARDMAN	+16	n/a	n/a
70	Paramount+	+13	+7	+1
89	BBC	+6	+4	+2

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: +23

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	Movement vs '24
17	IKEA	+35	-	-
20	Dunelm	+34	+6	-2
21	amazon	+34	+2	-
26	B&Q	+30	+3	+5
28	ebay	+30	n/a	-1
43	SCREWFIX	+24	-	-2
49	currys	+21	-7	+2
56	halfords	+17	+1	-
61	MATALAN	+16	-4	-2
72	HOMEBASE	+12	-8	-6

Rank	Brand	BRI score	Movement vs '23	Movement vs '24
73	Wickes	+12	-9	-5
85	mira SHOWERS	+7	n/a	-2
121	KOHLER	-5	n/a	-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: +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	Movement vs '24
10	M&S	+39	-3	-7
18	John Lewis	+35	n/a	-
19	Waterstones	+34	n/a	-6
29	adidas	+29	+9	+2
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	-
84	ZARA	+7	-2	-1
88	asos	+6	+2	+1
92	very.co.uk	+5	+4	+3
113	depop	-2	n/a	+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: +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	Movement vs '24
4	SAMSUNG	+46	+8	+9
34	LG	+27	+4	+7
62		+15	-	+3
126	ChatGPT	-15	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

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

Rank	Brand	BRI score	Movement vs '23	Movement vs '24
3	Lego	+51	+6	-3
36	Fisher-Price	+25	n/a	-4
47	PlayStation	+21	+8	+8
67	Hot Wheels	+13 ☆	n/a	n/a
69	UNO	+13 ☆	n/a	n/a
74	Mattel	+12 ☆	n/a	n/a
82	vtech	+7	n/a	-2
86	XBOX	+6	+3	-6
87	Jellycat	+6 ☆	n/a	n/a
94	Barbie	+5 ☆	n/a	n/a

Rank	Brand	BRI score	Movement vs '23	Movement vs '24
114	Minecraft	-2	+4	-
118	Roblox	-4	+8	+1
125	Fortnite	-12	+8	+8

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

jELLYCAT®
London

- 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

Sources: RED C UK 2025 Families @ Home (more details here), qualitative research amongst UK parents of kids aged 3-18

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	Movement vs '24
44	Jet2holidays	+23	+12	+1
53	eurostar	+18	+6	+3
59	TUI	+16	+8	-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	+0	+1	-2
111	Qatar Airways	-1	n/a	-11
124	Wizz	-8	n/a	+1
129	Ryanair	-19	+10	+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

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

Sources: RED C UK 2025 Families @ Home (more details here), qualitative research amongst UK parents of kids aged 3-18

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	Movement vs '24
25	MoneySuperMarket	+31	-4	-3
31	nationwide	+29	+7	+4
68	AVIVA	+13	+7	+2
77	Coventry Building Society	+8 ☆	n/a	n/a
79	first direct	+8	-	-2
80	monzo	+7	n/a	-1
83	Leeds Building Society	+7	n/a	+2
93	NatWest	+5	+6	+6
95	AXA	+4	+6	+2
97	LLOYDS BANK	+4	+1	-
99	Revolut	+3	+6	+3
100	TSB	+3	+2	+2
102	POST OFFICE	+2	-21	+21
103	BARCLAYS	+2	+5	+13
117	HSBC	-3	-2	+4
120	Bank of Ireland	-4	-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: +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

POST OFFICE

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

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

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

Rank	Brand	BRI score	Movement vs '23	Movement vs '24
64	O2	+15	+2	+6
91	EE	+6	+2	+4
96	Sky	+4	+12	+3
98	vodafone	+4	+7	-
112	Three	-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

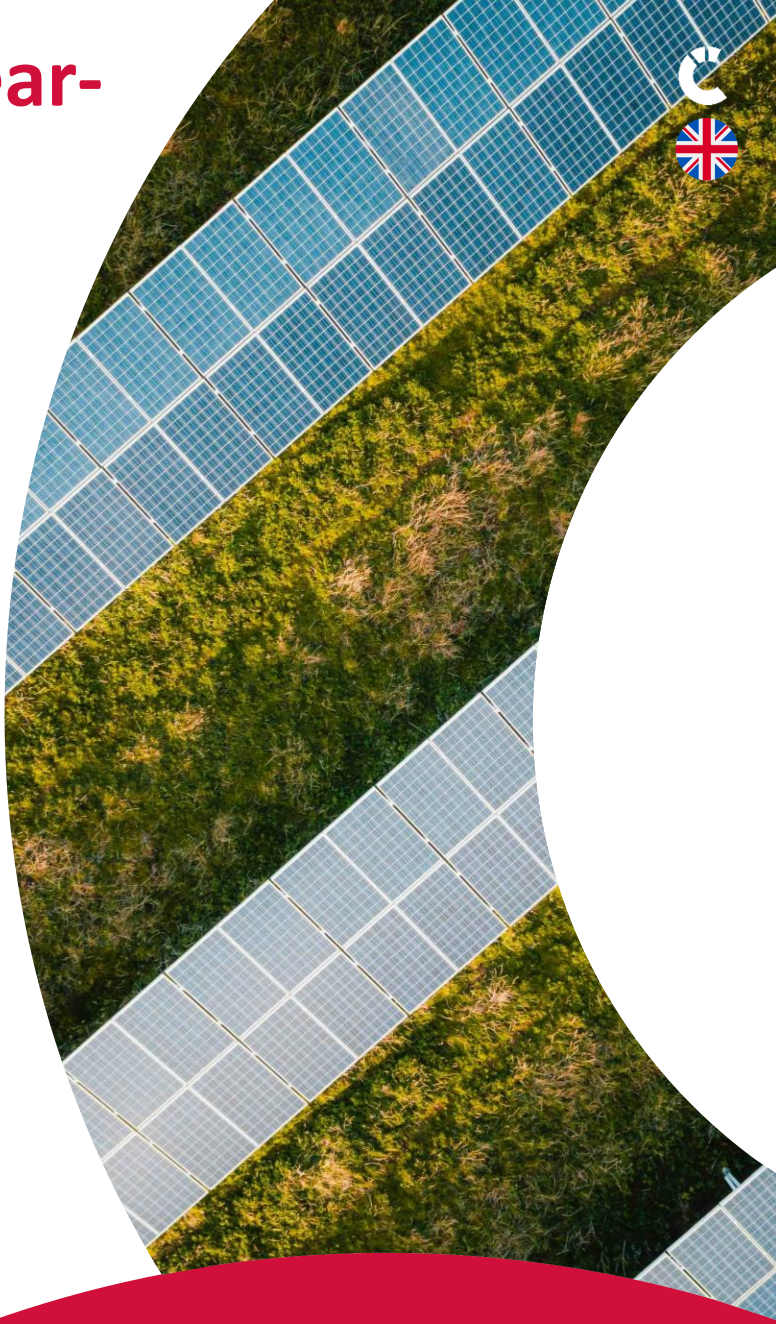
Cat avg: +3

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

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

Rank	Brand	BRI score	Movement vs '23	Movement 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	Movement vs '24
90	Instagram	+6	+4	+7
122	LinkedIn	-5	+2	+6
128	Facebook	-16	-3	-5
130	Snapchat	-20	-	+2
131	TikTok	-20	+7	+3
136	X	-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

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