

**REDC**

# BRAND REACTION INDEX 2026 UK



# Foreword: What makes people love a brand?



The 2026 Brand Reaction Index suggests the answer is increasingly emotional.

This year's strongest-performing brands aren't necessarily the newest or most disruptive. They're the brands that earn a place in people's everyday lives through trust, consistency and relevance. In a world of economic uncertainty and endless choice, consumers are rewarding brands that deliver reliably, create small moments of joy and genuinely earn their place in the budget.

At the same time, the brands gaining momentum are successfully showing up in culture through partnerships, communities, social conversation and shared experiences, while staying true to what makes them distinctive. The findings also point to wider shifts in consumer sentiment, with nostalgia, trust and real-world experiences becoming increasingly valuable sources of emotional connection.

**At RED C, we believe emotional connection is one of the strongest indicators of future brand success. We hope this report provides useful inspiration for brands looking to build deeper and more meaningful relationships with their users and customers!**

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*Insight Director, RED C Research*



# 2026 UK BRI Key takeouts



## IN A SCREEN-SATURATED WORLD, PEOPLE VALUE THE TANGIBLE & HUMAN

Consumers are increasingly drawn to in-person, experiences or things that create human conversation or connection.

Look for ways to create community and real-world engagement rather than relying solely on digital interactions.



## CULTURAL PRESENCE DRIVES RELEVANCE IN KEY MOMENTS

To show up in conversation, brands need to participate in culture and create impact through big moments & consistent presence.

Partnerships and conversations need to feel genuine and reinforce brand identity / brand values.



## TRUST & NOSTALGIA ARE POWERFUL LEVERS IN THE MIDST OF UNCERTAINTY

In more cautious spending environments, brands must earn their place: reliability, value, and being on the customer's side.

Trust takes time to build and is earned. Bonus points if nostalgia echoes 'simpler times', bringing comfort and reassurance.



# The 2026 BRI study includes 131 brands, covering a wide range of sectors

- Retail & Marketplaces
- Groceries
- Home & DIY
- Media & Entertainment
- FMCG Food & Drink
- Optical Services
- Gaming & Toys
- High Street food chains
- Property & Places
- Travel & Transport
- Financial Services & Investing
- Utilities
- Telecoms & Essential Services
- Technology & AI
- Sports
- Social Platforms

Reach out to find out how your brand and/or your competitors did!





How to read this report:  
**BRI scores range from -100 to +100**  
The higher the score, the more emotionally connected your brand is



01

# The UK's most emotionally connected brands





UK'S MOST EMOTIONALLY CONNECTED BRANDS

# Grocery & retail dominate the Top 10 Brands for 2026



+51



+50



+49



+48



+47



+47



+43



+43



+42



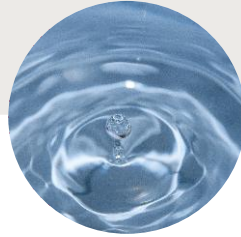
+42

# What separates a brand we merely use from one we love? It's not the boldest promise, but the most reliable one



## **"Everyday intimacy" beats aspiration**

Play on daily rituals, personal space and identity and leisure/downtime



## **Simplicity & clarity of proposition**

They all stand for something instantly understandable. For example, M&S Food = quality you can trust



## **Trust built through consistency over time**

Nearly all are long-established, highly consistent in delivery and resistant to trend-chasing



## **"Small joys" rather than big promises**

These brands deliver low-stakes, repeatable pleasure that can easily be embedded into everyday life



## **Nostalgia & childhood link**

Nostalgia acts as an emotional multiplier, in particular when linked to childhood memories



# Keeping a heritage brand fresh, relevant and talked about: M&S Food continues to be a hit across every generation



1

## Heritage: Rooted in iconic Britishness

A trusted heritage brand that evolves without losing its identity, backed by a growing physical presence that brings the brand to life and reinforces its everyday relevance

2

## Leadership: Not just following trends, but setting the standard

Spanning the 'Nutrient Dense' range to the 'Chocolate, Strawberry and Pistachio Creme Sandwich', M&S delivers innovation that sparks excitement and responds to changing needs. All this, underpinned by a brand people trust

3

## Amplification: Turning products into social-media moments

From 'Picky Bits' to employee-led content, M&S turns products into shareable stories, brought to life by store-run social pages that add a local and authentic voice

# LEGO® keeps reinventing itself, turning cultural relevance into lasting brand love

## 1

**Innovation: Transforming football legends into LEGO minifigures with FIFA**  
LEGO® stays culturally relevant and gives consumers regular reasons to engage, while partnerships bring in new audiences. By tapping into iconic franchises, LEGO inherits the existing affinity

## 2

**Fandom: Building a community, not just a product**  
LEGO® fosters a passionate community, creating a sense of belonging and brand love. With the rise of nostalgia and kidulting, this community continues to grow among adults

## 3

**Brand values: Trusted in a changing world**  
In an era of screen fatigue, LEGO® offers a trusted, hands-on activity that supports creativity and wellbeing





## 6 brands have generated stronger emotional momentum and are on the rise vs last year



|                         |  |  |  |  |  |  |
|-------------------------|-------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------|
| '26 vs '25 points shift | +11pts                                                                              | +11pts                                                                              | +9pts                                                                               | +9pts                                                                               | +9pts                                                                               | +8pts                                                                               |
| 2026 Score              | +49                                                                                 | -9                                                                                  | +21                                                                                 | +5                                                                                  | +48                                                                                 | +43                                                                                 |
| 2025 Score              | +38                                                                                 | -20                                                                                 | +12                                                                                 | -4                                                                                  | +39                                                                                 | +35                                                                                 |

# Walkers wins by consistently showing up, whether it be a major cultural event or everyday moments of joy



1

## Rituals: Turning cultural moments into brand moments

Walkers taps into major events like the World Cup, embedding itself in matchday rituals and feeling like a natural part of the experience

2

## Consistency: Always present, always relevant

As people cut back, brands need to earn their place. Walkers does this by maintaining consistent presence, reinforcing its role as a trusted staple and a source of small moments of joy

3

## Distinctiveness: Using the familiar in unexpected ways

Walkers stays true to its most recognisable flavours and branding, then reworks it in fresh ways. From classic flavours reimaged to football jerseys, Walkers evolves its core assets without losing what makes it distinctive and loved





Meanwhile, 8 brands have seen their emotional connection weaken compared to 2025



|                            | <i>Barbie</i> |  | NETFLIX | prime<br>video | <br>Nestlé | TESCO | <br>Nando's | <i>Cadbury</i> |
|----------------------------|---------------|-------------------------------------------------------------------------------------|---------|----------------|-----------------------------------------------------------------------------------------------|-------|------------------------------------------------------------------------------------------------|----------------|
| '26 vs '25<br>points shift | -6pts         | -6pts                                                                               | -7pts   | -7pts          | -8pts                                                                                         | -9pts | -9pts                                                                                          | -17pts         |
| 2026 Score                 | -1            | +8                                                                                  | +38     | +25            | +17                                                                                           | +32   | +16                                                                                            | +36            |
| 2025 Score                 | +5            | +14                                                                                 | +45     | +32            | +25                                                                                           | +41   | +25                                                                                            | +53            |

# Emotional connection eases back – even for category leaders like Cadbury



1

**Category Headwinds: Health shifts are reshaping chocolate's emotional role**  
Rising health consciousness, GLP-1 weight-loss drugs and a 'less but better' mindset are changing how people feel about everyday treats

2

**Shrinkflation: Paying more for less leaves consumers frustrated**  
Between December 2021 and 2025, the BBC reports Cadbury's Dairy Milk weighs 10% less, but the cost has jumped by 48% - likely to generate frustrations amongst consumers

3

**Competitive Pressure: Premium & novelty brands are stealing emotional attention**  
As consumers reduce everyday chocolate consumption, they're gravitating toward more 'special', indulgent or premium treats

02

# Generations connect with brands differently





# Reminder of the generations we're looking at, and when they were born

## Gen Z

1997-2008  
Ages 18 - 29



## Millennials

1981-1996  
Ages 30 - 45



## Gen X

1965-1980  
Ages 46 - 61



## Baby Boomers

1946-1964  
Ages 62 - 80





For **Gen Z**, relevance is earned through connection, creativity and culture



+57



+55



+53



+52



+46



+45



+42



+41



+41



+40

# YouTube wins with Gen Z by acting as their entertainment hub, learning tool and identity space in one

“ For Gen Zers like me, YouTube isn’t an app or a website – it’s the backdrop of our waking lives

Sasha Mistlin, The Guardian  
(November 2025)

<https://www.theguardian.com/culture/2025/nov/21/has-tv-gone-down-the-youtube-how-the-platform-changed-how-we-consume-and-create-media>



1

**Utility: The platform for whatever Gen Z need, whenever they need it**

From music and gaming to tutorials and entertainment, YouTube fits seamlessly into everyday life, combining short-form and long-form content in one place

2

**Community: Creator relationships build trust and belonging**

Creators often feel more authentic and relatable than traditional media, creating familiarity, routine and a sense of belonging

3

**Culture: Powering fandoms, trends and shared experiences**

YouTube helps turn niche interests into shared experiences, powering the conversations, communities and cultural moments Gen Z wants to be part of

# Gen Z filmmakers are making films feel more intimate and audience-led, slowly reshaping expectations for cinema

YouTube-trained creators bring faster pacing, sharper hooks and internet-native visual language

Gen Z audiences value originality, authenticity and personality over formulaic polish

Built-in communities turn creators into cultural brands before they enter cinema

## The Result:

Films that feel more participatory, niche-aware and culturally current





# Millennials: Trusted brands are turning nostalgia into connection



+50



+49



+48



+44



+44



+43



+42



+41



+40



+37



# Millennials embrace the nostalgia trend, and brands that help them turn back to simpler times connect better with them

1

## **Nostalgia & connection: Childhood familiarity is driving deeper resonance**

Amid economic uncertainty, political tension and social media fatigue, Millennials are increasingly drawn to brands, products and experiences that reconnect them with simpler times

2

## **Brands playing in culture: Reworking the old in new ways**

Whether through the revival of iconic cultural moments or iconic partnerships, the past is being remixed for today. Brands are turning familiarity into the conversations and connections people crave

3

## **Kidulting: Millennials are embracing their inner child**

From a growing number of adults buying toys for themselves to re-engaging with playful, nostalgic experiences and products, behaviours traditionally associated with younger audiences are being redefined for adult life



# Trust, quality and value remain the foundations of **Gen X** brand love



+59



+52



+51



+50



+50



+49



+47



+47



+44



+44



# DIY resonates with Gen X, with Dulux emerging as a trusted leader



1

## Timings: Life stage demand

Gen X are more likely to own homes and be settled, with ongoing needs to maintain and adapt their spaces, making DIY and decorating a consistent, considered activity

2

## Trends: Improve, not move

Rising moving costs are accelerating a shift towards renovation over relocation, increasing demand for cost-effective ways to refresh and upgrade the home

3

## Familiarity: Trusted, but relevant

Brands like Dulux benefit from strong familiarity and trust, driven by famous campaigns (Dulux dog) and a feeling of occupying a mid-tier 'safe' space - not cheap, but not too expensive either

# **Baby Boomers:** Dependability drives the strongest emotional bonds



+61



+60



+55



+54



+53



+53



+53



+53



+50



+50



# Nationwide aligns with Baby Boomers' desire for trust, service and reliability

1

## **Presence: Dependable customer service with a human touch**

As banking continues to go digital, Baby boomers value accessible, human support, and Nationwide stands out for maintaining strong high-street presence alongside consistently high customer satisfaction

2

## **Loyalty: Redefining the rules of banking**

In a market that often prioritises new customers, Nationwide rewards existing members through the Fairer Share initiative. This approach builds trust and reinforces a sense of value and ownership that encourages loyalty

3

## **Consistency: Investing in brand building with Dominic West**

Through long-running campaigns, including working with Dominic West, Nationwide emphasises its member-first positioning. In doing so, Nationwide has built a warm and recognisable brand



03

Not all sectors  
emotionally connect  
at the same level







# Retail & Marketplaces alongside Groceries lead the way for emotional connection

Top-performing sectors: Retail & Marketplaces, Grocers, and Home & DIY, are built on familiarity and consistent delivery. These are brands people have grown up with, trust to meet functional needs, and rely on day-to-day.

A key theme across high scorers is that **cutting back doesn't mean spending less, but spending better**. Consumers prioritise value, whether through small, justified treats or sticking with brands they trust to deliver quality and lasting satisfaction.

At the same time, despite the need for brands to stay culturally relevant, digital fatigue is emerging. Categories underpinning the digital world skew more negative, highlighting a growing desire for real world experiences and in-person engagement.

| Sector Average |                                          |
|----------------|------------------------------------------|
| +37            | Retail & Marketplaces                    |
| +35            | Groceries                                |
| +22            | Home & DIY                               |
| +22            | Media & Entertainment                    |
| +21            | FMCG Food & Drink                        |
| +19            | Optical Services                         |
| +17            | Gaming & Toys                            |
| +16            | High Street food chains                  |
| +9             | Property & Places                        |
| +6             | Travel & Transport                       |
| +5             | Financial Services & Investing           |
| +1             | Utilities, Telecoms & Essential Services |
| -5             | Technology & AI                          |
| -6             | Sports                                   |
| -12            | Social Platforms                         |

## Retail & Marketplaces

Strong positivity across Retail & Marketplaces driven by Baby Boomers. Amazon's strong performance driven by older demographics.

| Rank              | Brand                                                                                          | 2026 BRI Score                                                                          | Movement |        |    |
|-------------------|------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------|----------|--------|----|
|                   |                                                                                                |                                                                                         | vs '24   | vs '25 |    |
| 4                 | M&S                                                                                            |  +48 | +1       |        | +9 |
| 13                |  Waterstones |  +38 | -        |        | +4 |
| 22                | John Lewis                                                                                     |  +33 | -        |        | -2 |
| 25                | amazon                                                                                         |  +31 | -3       |        | -3 |
| Category Average: |                                                                                                | +37                                                                                     |          |        |    |

# Groceries

Being single-minded about what they offer, knowing their shopper and building something for them in terms of stores, ranging and value wins in the Groceries sector

| Rank              | Brand                  | 2026 BRI Score | Movement<br>vs '24 vs '25 |     |
|-------------------|------------------------|----------------|---------------------------|-----|
| 1                 | M&S<br>-FOOD-          | +51            | +7                        | -2  |
| 5                 | ALDI                   | +47            | +5                        | +2  |
| 6                 | LIDL                   | +47            | 0                         | +6  |
| 11                | Sainsbury's            | +40            | 0                         | +2  |
| 19                | Morrisons              | +34            | +9                        | +11 |
| 23                | TESCO                  | +32            | +5                        | -9  |
| 32                | ASDA                   | +28            | +3                        | +4  |
| 41                | WAITROSE<br>& PARTNERS | +21            | 0                         | 0   |
| 51                | ocado                  | +15            | +4                        | +6  |
| Category Average: |                        | +35            |                           |     |

# Home & DIY

IKEA continues to improve, underpinned by trusted value and quality. Currys gains in line with recent financial performance, driven by high street presence and in-store expert guidance

| Rank | Brand                 | 2026 BRI Score  | Movement<br>vs '24 vs '25 |     | Rank                  | Brand | 2026 BRI Score | Movement<br>vs '24 vs '25 |   |
|------|-----------------------|-----------------|---------------------------|-----|-----------------------|-------|----------------|---------------------------|---|
| 7    |                       | <div></div> +43 | +8                        | +8  | 85                    |       | <div></div> +5 |                           | ★ |
| 21   |                       | <div></div> +33 |                           | ★   | 105                   |       | <div></div> -1 |                           | ★ |
| 24   | <br>The Home of Homes | <div></div> +31 | -5                        | -3  | Category Average: +22 |       |                |                           |   |
| 26   |                       | <div></div> +30 | +5                        | 0   |                       |       |                |                           |   |
| 34   |                       | <div></div> +27 | +8                        | +6  |                       |       |                |                           |   |
| 35   |                       | <div></div> +26 | 0                         | +2  |                       |       |                |                           |   |
| 38   |                       | <div></div> +21 | +4                        | +10 |                       |       |                |                           |   |
| 43   |                       | <div></div> +20 |                           | ★   |                       |       |                |                           |   |
| 48   |                       | <div></div> +16 | -2                        | -1  |                       |       |                |                           |   |
| 64   |                       | <div></div> +10 | -                         | +3  |                       |       |                |                           |   |



# Media & Entertainment

Penguin Books tops the rankings as digital fatigue increases the appeal of trusted, slower forms of entertainment

| Rank | Brand       | 2026 BRI Score | Movement vs '24 | Movement vs '25 | Rank                  | Brand | 2026 BRI Score | Movement vs '24 | Movement vs '25 |
|------|-------------|----------------|-----------------|-----------------|-----------------------|-------|----------------|-----------------|-----------------|
| 9    |             | +42            | ★               |                 | 73                    |       | +8             | -3              | -5              |
| 14   | NETFLIX     | +38            | +1              | -7              | 91                    | BBC   | +2             | -2              | -4              |
| 18   | YouTube     | +35            | -5              | -5              | 100                   | sky   | 0              | -2              | -4              |
| 27   | itv         | +30            | +4              | +2              | Category Average: +22 |       |                |                 |                 |
| 29   | Disney      | +28            | ★               |                 |                       |       |                |                 |                 |
| 30   | Disney+     | +28            | +2              | -1              |                       |       |                |                 |                 |
| 36   | prime video | +25            | 0               | -7              |                       |       |                |                 |                 |
| 40   | Spotify     | +21            | -3              | 0               |                       |       |                |                 |                 |
| 46   | AARDMAN     | +16            | -               | 0               |                       |       |                |                 |                 |
| 70   | HBO         | +9             | ★               |                 |                       |       |                |                 |                 |

# FMCG Food & Drink

Established brands win through familiarity and trust, offering consistent quality and a sense of comfort in a time of tighter spending

| Rank | Brand | 2026 BRI Score | Movement vs '24 | Movement vs '25 | Rank                  | Brand | 2026 BRI Score | Movement vs '24 | Movement vs '25 |
|------|-------|----------------|-----------------|-----------------|-----------------------|-------|----------------|-----------------|-----------------|
| 3    |       | +49            | +6              | +11             | 72                    |       | +8             |                 | ★               |
| 8    |       | +43            | +9              | +5              | 79                    |       | +7             |                 | ★               |
| 12   |       | +38            | +3              | +2              | 88                    |       | +3             | -               | +5              |
| 15   |       | +36            | -17             | -17             | 90                    |       | +3             |                 | ★               |
| 20   |       | +34            | -               | +1              | 103                   |       | -1             | -3              | -3              |
| 31   |       | +28            | +1              | +4              | Category Average: +21 |       |                |                 |                 |
| 44   |       | +17            | -               | -8              |                       |       |                |                 |                 |
| 49   |       | +16            |                 | ★               |                       |       |                |                 |                 |
| 53   |       | +15            |                 | ★               |                       |       |                |                 |                 |
| 58   |       | +14            |                 | +6              |                       |       |                |                 |                 |

## Optical Services

Specsavers is the strongest brand for emotional connection in optical services and continues to see improvements each year

| Rank              | Brand                                                                                              | 2026 BRI Score                                                                          | Movement |        |
|-------------------|----------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------|----------|--------|
|                   |                                                                                                    |                                                                                         | vs '24   | vs '25 |
| 33                |  Specsavers      |  +27 | -        | +6     |
| 45                |  Boots Opticians |  +17 | ★        |        |
| 54                |  VisionExpress   |  +15 | ★        |        |
| Category Average: |                                                                                                    | +19                                                                                     |          |        |



# Gaming & Toys

LEGO® maintains lead in the category. PlayStation outperforms Xbox, supported by a strong slate of exclusive titles

| Rank              | Brand        | 2026 BRI Score | Movement<br>vs '24 vs '25 |       |
|-------------------|--------------|----------------|---------------------------|-------|
| 2                 | LEGO         |                | +50                       | -4 -1 |
| 37                | fisher-price | +23            | -                         | -2    |
| 42                | PS           | +20            | +7                        | -1    |
| 52                | MATTEL       | +15            | -                         | +4    |
| 59                | HOT WHEELS   | +13            | -                         | -1    |
| 71                | JELLYCAT     | +8             | -                         | +2    |
| 81                | XBOX         | +6             | -6                        | 0     |
| 106               | Barbie       | -1             | -                         | -6    |
| Category Average: |              | +17            |                           |       |





## High Street food chains

Greggs stands out for positive emotional connection, likely driven by value, taste and loyalty rewards. Despite McDonald's growing physical presence, their BRI score softens

| Rank              | Brand                                                                                          | 2026 BRI Score  | Movement |        |
|-------------------|------------------------------------------------------------------------------------------------|-----------------|----------|--------|
|                   |                                                                                                |                 | vs '24   | vs '25 |
| 16                |  GREGGS      | <div></div> +36 | -        | +3     |
| 50                |  Nando's     | <div></div> +16 | -4       | -9     |
| 56                |  COSTA       | <div></div> +15 | ★        |        |
| 69                |  PRET        | <div></div> +9  | ★        |        |
| 75                |  MCDONALD'S | <div></div> +8  | -5       | -7     |
| Category Average: |                                                                                                | +16             |          |        |



# Property & Places

Being purpose-led and offering an enjoyable escape into nature away from screens, the National Trust ranks as a top 10 brand overall and #7 among Millennials

| Rank              | Brand                                                                                               | 2026 BRI Score  | Movement |        |
|-------------------|-----------------------------------------------------------------------------------------------------|-----------------|----------|--------|
|                   |                                                                                                     |                 | vs '24   | vs '25 |
| 10                |  National Trust   | <div></div>     | +42      | +0 +4  |
| 110               |  Knight Frank     | -3 <div></div>  | ★        |        |
| 120               |  THE CROWN ESTATE | -12 <div></div> | -5       | -5     |
| Category Average: |                                                                                                     | +9              |          |        |

# Travel & Transport

Despite rising costs associated with travel, the category is broadly stable as families still prioritise holidays over other spending areas



| Rank | Brand                                          | 2026 BRI Score | Movement vs '24 | Movement vs '25 |
|------|------------------------------------------------|----------------|-----------------|-----------------|
| 39   | Jet2holidays<br>Package holidays you can trust | +21            | -2              | -2              |
| 47   | TUI                                            | +16            | -1              | -0              |
| 55   | BRITISH AIRWAYS                                | +15            | -3              | -1              |
| 60   | Emirates                                       | +11            | -               | -5              |
| 62   | eurostar                                       | +10            | -4              | -8              |
| 73   | easyJet                                        | +8             | +4              | -1              |
| 77   | virgin atlantic                                | +7             | -8              | -6              |
| 82   | QATAR AIRWAYS<br>الخطوط القطرية                | +6             | -               | +7              |
| 94   | Heathrow<br>Making every journey better        | +2             | 0               | +1              |
| 99   | LONDON GATWICK                                 | +0             | 0               | 0               |

| Rank              | Brand   | 2026 BRI Score | Movement vs '24 | Movement vs '25 |
|-------------------|---------|----------------|-----------------|-----------------|
| 113               | Wizz    | -5             | -               | +3              |
| 124               | RYANAIR | -19            | +1              | +0              |
| Category Average: |         | +6             |                 |                 |



# Financial Services & Investing

Across generations, Nationwide receives the most positive response. Amongst, Gen Z sentiment towards Revolut skews negative (-4) with scores driven by Millennials (+14)



| Rank | Brand                    | 2026 BRI Score | Movement vs '24 | Movement vs '25 | Rank                 | Brand                           | 2026 BRI Score | Movement vs '24 | Movement vs '25 |
|------|--------------------------|----------------|-----------------|-----------------|----------------------|---------------------------------|----------------|-----------------|-----------------|
| 17   | nationwide               | +35            | +10             | +6              | 89                   | HSBC                            | +3             | +11             | +7              |
| 57   | AVIVA                    | +14            | +3              | +1              | 93                   | Vanguard                        | +2             | ★               |                 |
| 61   | SKIPTON BUILDING SOCIETY | +11            | ★               |                 | 96                   | POST OFFICE                     | +1             | +20             | -1              |
| 65   | first direct             | +9             | 0               | +2              | 97                   | AJ Bell                         | +1             | ★               |                 |
| 66   | monzo                    | +9             | -               | +2              | 98                   | F&C INVESTMENT TRUST SINCE 1988 | +1             | ★               |                 |
| 75   | LLOYDS                   | +8             | +4              | +4              | 101                  | TRADING 212                     | -0             | ★               |                 |
| 80   | NatWest                  | +6             | +8              | +2              | 102                  | BARCLAYS                        | -0             | +11             | -2              |
| 83   | AXA                      | +6             | +4              | +2              | 104                  | HARGREAVES LANSDOWN             | -1             | ★               |                 |
| 84   | Leeds Building Society   | +5             | -               | -1              | 108                  | TSB                             | -2             | -2              | -4              |
| 86   | Bank of Ireland          | +5             | +8              | +9              | 112                  | ii interactive investor         | -4             | ★               |                 |
| 87   | Revolut                  | +5             | +5              | +2              | Category Average: +5 |                                 |                |                 |                 |



# Utilities, Telecoms & Essential Services

In a category that struggles to connect, Octopus Energy stands out by applying the same principles we see driving success across sectors, delivering reliable customer service, rewarding loyalty, and investing in brand building

| Rank              | Brand                                                                                                | 2026 BRI Score |     | Movement |        |
|-------------------|------------------------------------------------------------------------------------------------------|----------------|-----|----------|--------|
|                   |                                                                                                      |                |     | vs '24   | vs '25 |
| 28                | <br>octopus energy |                | +29 | +10      | +5     |
| 114               | <br>Royal Mail     | -6             |     | +3       | -6     |
| 116               | <br>EDF            | -7             |     | +3       | -4     |
| 119               | <br>British Gas   | -9             |     | +8       | +11    |
| Category Average: |                                                                                                      | +1             |     |          |        |

# Technology & AI

Consumer sentiment towards AI skews negative, driven by feelings of contempt and fear – negative sentiment strongest towards ChatGPT

| Rank              | Brand                                                                                     | 2026 BRI Score | Movement |        |
|-------------------|-------------------------------------------------------------------------------------------|----------------|----------|--------|
|                   |                                                                                           |                | vs '24   | vs '25 |
| 78                |         | +7             | -5       | -8     |
| 111               |  Gemini  | -4             | ★        |        |
| 115               |  Claude  | -6             | ★        |        |
| 122               |  ChatGPT | -18            | -        | -4     |
| Category Average: |                                                                                           | -5             |          |        |



# Sports

Emotional resonance in sport led by Women's Super League, who have seen growth in terms of recognition and championing inclusivity and a family friendly atmosphere

| Rank              | Brand                                                                                             | 2026 BRI Score | Movement |        |
|-------------------|---------------------------------------------------------------------------------------------------|----------------|----------|--------|
|                   |                                                                                                   |                | vs '24   | vs '25 |
| 67                |  WSL FOOTBALL   | +9             |          | ★      |
| 95                |  Premier League | +1             |          | ★      |
| 107               |  EFL            | -1             |          | ★      |
| 117               |  The FA         | -8             |          | ★      |
| 123               |  FIFA           | -19            |          | ★      |
| 125               |  UEFA          | -20            |          | ★      |
| Category Average: |                                                                                                   | -6             |          |        |



# Social Platforms

Pinterest occupies a unique space within social media, as an outlet for creativity and a useful a tool for inspiration. X and Snapchat receive strong levels of negativity

| Rank              | Brand     | 2026 BRI Score | Movement |        |
|-------------------|-----------|----------------|----------|--------|
|                   |           |                | vs '24   | vs '25 |
| 68                | Pinterest | +9             | ★        |        |
| 92                | Instagram | +2             | +3       | -4     |
| 109               | reddit    | -2             | ★        |        |
| 118               | twitch    | -8             | ★        |        |
| 121               | facebook  | -15            | -3       | +2     |
| 126               | TikTok    | -22            | +1       | -2     |
| 127               | Snapchat  | -23            | -2       | -4     |
| 130               | X         | -36            | -8       | +2     |
| Category Average: |           | -12            |          |        |

04

How do we  
assess emotional  
connection?





# RED C's Brand Reaction Index 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



# How consumers feel today shapes the brands they choose tomorrow

Paul Ekman is an emotional psychologist who theorised that basic human emotions (happiness/enjoyment, sadness, anger, fear, surprise, disgust and contempt) are innate and shared by everyone, and that they are accompanied across cultures by universal facial expressions.

By defining the emotion that consumers attach to brands, we can quantify those that have stronger positive emotions vs. those that don't.

## Why do we measure BRI for brands?

**01**

A strong positive emotion is recognised as impacting future purchase intent – the stronger the likelihood that the consumer will purchase / consume this brand in the future

**02**

BRI has been noted to be very reactive – e.g. it provides an assessment of current mood of consumers and highlights challenges that brands may face at a particular moment in time

**03**

The reactive nature of BRI means it is an early indicator of future metrics – e.g. a lowered BRI suggests other brand health measures will start to fall in the future



# The BRI methodology captures how consumers feel about brands

## How is it asked?

"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:

$$\begin{array}{l} \% \text{ Positive} \\ \text{Emotion} \\ \text{(Happy)} \end{array} - \begin{array}{l} \% \text{ Negative} \\ \text{Emotions} \\ \text{(Contempt,} \\ \text{Disgust, Anger,} \\ \text{Fear, Sadness)} \end{array} = \begin{array}{l} \text{BRI score} \\ \text{(Scores range from} \\ \text{+100 to -100)} \end{array}$$

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

Where ties have occurred, we have looked at the results to two decimal places to break the tie



Spotted a competitor in the brand list? Interested in more details?

Get in touch!



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