MORNING CONSULT

MOST LOVED BRANDS 2020

SPECIAL REPORT:

MOST LOVED BRANDS OF 2020

What Drives Brand Love In A Year Like No Other

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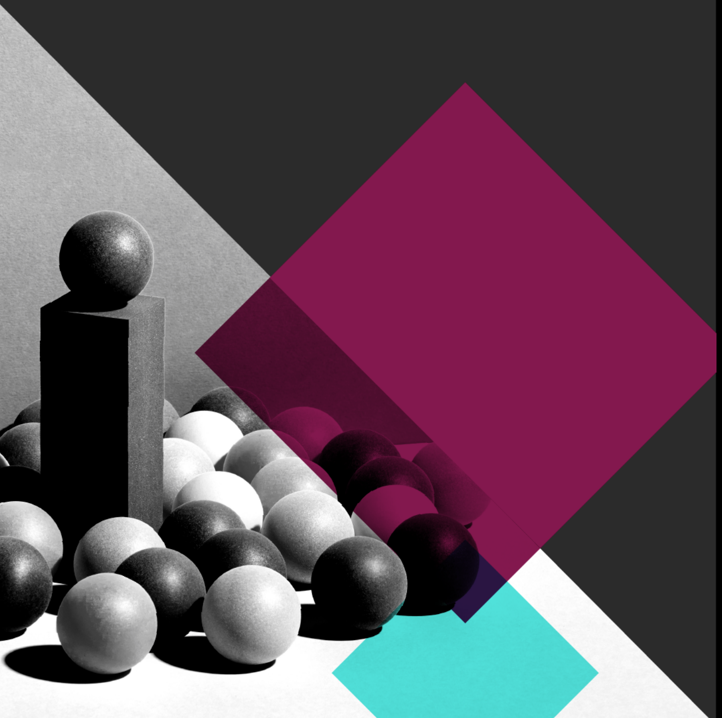


INTRODUCTION

The coronavirus pandemic has proven to be among the most far-reaching and trying events of our lifetimes. Almost overnight, it changed the way we live, work and interact with the world around us.

In the fourth edition of Morning Consult's Most Loved Brands, we explore how the pandemic is transforming our relationship with the brands we love. This year's top brands range from companies that have always been there for us to industry disruptors who are meeting this moment and in doing so changing the way we live, work, and entertain ourselves.

It's clearer than ever that Brand Love plays a critical role in the lasting and loyal relationships every brand strives to have with its customers. Our research shows that the gap between the Most Loved Brands and all others has widened in recent months, confirming that love is not only a catalyst for continued success in good times, but also powerful protection from dramatic downturns in tough ones.

COVID-19 has drastically impacted spending behavior, shopping habits and even selection criteria – with real implications for the short-term survival and the long-term growth potential of today's brands. This report seeks to address how Brand Love is evolving and what brands can do today to build long-lasting relationships that extend far past this pandemic to usher in a new era of brand-led business growth.

KEY NUMBERS TO KNOW

48%

Nearly half (48%) of 2020's Most Loved Brands *are Food & Beverage* brands or *Household & Personal* brands.

49

Brand Love is a key indicator of financial performance: There is a 49 point gap in net purchasing consideration between 2020's Most Loved Brands and all other brands.

12%

2020's most loved category, *Shipping & Logistics*, has an average Brand Love index score 12% higher than the second most-loved category, *Restaurants*.

26

Gen Z has its own perspective on the Brand Love equation. There are 26 brands that Gen Z love which do not appear on the top 50 list for all adults. Gen Z as a generation especially loves brands offering entertainment, innovation, and an experience, but also has a soft spot for the nostalgia of legacy brands better known to their elders.

16

There are 16 key top drivers of Brand Love, which include functional fundamentals like reliability, reputation, and availability, as well as emotional essentials like trust, ease of experience, and quality.

1

2020’s Most Loved Brands

A cross-category deep-dive into this year’s most-loved B2C brands

HOW WE DETERMINED THIS YEAR'S RANKINGS

Morning Consult's Most Loved Brands is the definitive ranking of the brands defining American culture and commerce.

To determine this year's rankings, Morning Consult analyzed over 150,000 Morning Consult Brand Intelligence interviews with U.S. adults to measure consumer perceptions across four key metrics: favorability, trust, community impact, and Net Promoter Score.

The final rankings were determined using surveys conducted online among a national sample of adults. Between 3,700 and 8,300 adults rated each of the over 1,900 companies from June through July 2020. The average company was surveyed over 6,000 times. The maximum margin of error for a given brand is plus or minus 3%.

The Most Loved Brands Index is based on four metrics, added together for an index score:

- **Favorability Score:** The percentage of consumers with a favorable opinion of the brand.
- **Trust Score:** The percentage of consumers who trust the brand to do the right thing.
- **Community Impact Score:** The percentage of consumers who say the brand has a positive impact on their local community.
- **Net Promoter Score:** Consumers are asked on a scale of 1-10 how likely they would be to promote a given brand. NPS is determined by subtracting the percentage who say 0-6 from the percentage who say 9 or 10.

KEY TAKEAWAYS

1

2020’s Most Loved Brands Span 14 Product Categories, But Food & Beverage and Household Brands Dominate

Nearly half (48%) of the top 50 Most Loved Brands are *Food & Beverage* or *Household & Personal* brands. *CPG* and *Social Media* brands also fared quite well relative to all other brands on average in recent months across key brand metrics, while luxury brands were outperformed by all brands on average.

2

Brand Love & Business Performance Are Interconnected, Especially In Tough Times

There is a 49 point gap in net purchasing consideration between 2020’s Most Loved Brands and all other brands. Additionally, the relationship between usage and Brand Love strengthened significantly since March 2020, underscoring that in tough times, the components of Brand Love not only matter, they become even more important when consumers’ choices are limited, finances are strained, and stress is running high.

3

Brands Known For Diversity & Inclusion Fare Notably Well

The pandemic isn’t the only major moment of 2020. Our reckoning with race in America has forced many brands to address how they approach inclusion and diversity. On this year’s list, companies delivering on these qualities outperform the “all brand” average on several key metrics.

2020 Most Loved Brands: 1-25

Rank	Brand	Category	2020 Love Index Score
1	United States Postal Service	Shipping and Logistics	264.8
2	Google	Internet Services	258.6
3	UPS	Shipping and Logistics	257.5
4	amazon	Retailers	256.0
5	NETFLIX	Television, Movies and Radio	253.7
6	Clorox	Household and Personal Products	246.4
7	prime	Consumer Electronics	245.7
8	m&m's	Food and Beverage Products	244.1
9	The Home Depot	Retailers	241.8
10	YouTube	Social Media	241.7
11	Cheerios	Food and Beverage Products	240.4
12	FedEx	Shipping and Logistics	239.5
13	TARGET	Retailers	236.7
14	Ziploc	Household and Personal Products	236.2
15	Dove	Household and Personal Products	235.2
16	Kellogg's	Food and Beverage Products	235.2
17	Dollar Tree	Retailers	235.0
18	Tide	Household and Personal Products	234.1
19	Colgate	Household and Personal Products	233.6
20	Oreo	Food and Beverage Products	233.3
21	Lowe's	Retailers	233.0
22	Hershey's	Food and Beverage Products	232.8
23	Walmart	Retailers	232.5
24	Reese's	Food and Beverage Products	232.3
25	Heinz Tomato Ketchup	Food and Beverage Products	231.9

2020 Most Loved Brands: 26-50

Rank	Brand	Category	2020 Love Index Score
26	Walgreens	Pharmacies, Suppliers, and PBMs	230.9
27	DQ	Restaurants	230.7
28	PayPal	Financial Services	230.2
29	Doritos	Food and Beverage Products	229.8
30	Snickers	Food and Beverage Products	229.7
31	CVS/pharmacy	Health Services	227.1
32	Dunkin'	Restaurants	226.9
33	Chick-fil-A	Restaurants	226.7
34	KitKat	Food and Beverage Products	226.3
35	Disney	Television, Movies and Radio	225.5
36	Samsung	Consumer Electronics	225.1
37	Coca-Cola	Food and Beverage Products	224.8
38	Crest	Household and Personal Products	224.5
39	Tylenol	Household and Personal Products	224.3
40	The Weather Channel	News Media	224.2
41	Subway	Restaurants	224.1
42	Costco Wholesale	Retailers	224.1
43	Scotch	Household and Personal Products	223.2
44	Visa	Financial Services	222.8
45	Kraft	Food and Beverage Products	222.1
46	Ritz	Food and Beverage Products	222.1
47	Lay's	Food and Beverage Products	220.7
48	Febreze	Household and Personal Products	220.6
49	Charmin	Household and Personal Products	220.0
50	Microsoft	Enterprise Software	219.7

2020's Most Loved Brands span 14 product categories

48% of top brands are in two: *Food & Beverage* and *Household & Personal*

Category	# Brands in the Top 50	Average Category Love Index (top 50 brands)	Average Category Love Index (all brands)
Food & Beverage Products	14	230.4	157.2
Household & Personal Products	10	229.8	149.4
Retailers	7	237.0	138.6
Restaurants	4	227.1	157.6
Shipping & Logistics	3	253.9	175.9
Consumer Electronics	2	235.4	129.2
Financial Services	2	226.5	74.8
Television, Movies & Radio	2	239.6	132.3
Enterprise Software	1	219.7	98.6
Health Services	1	227.1	80.2
Internet Services	1	258.6	104.3
News Media	1	224.2	91.9
Pharmacies, Suppliers, & PBMs	1	230.9	143.8
Social Media	1	241.7	128.5

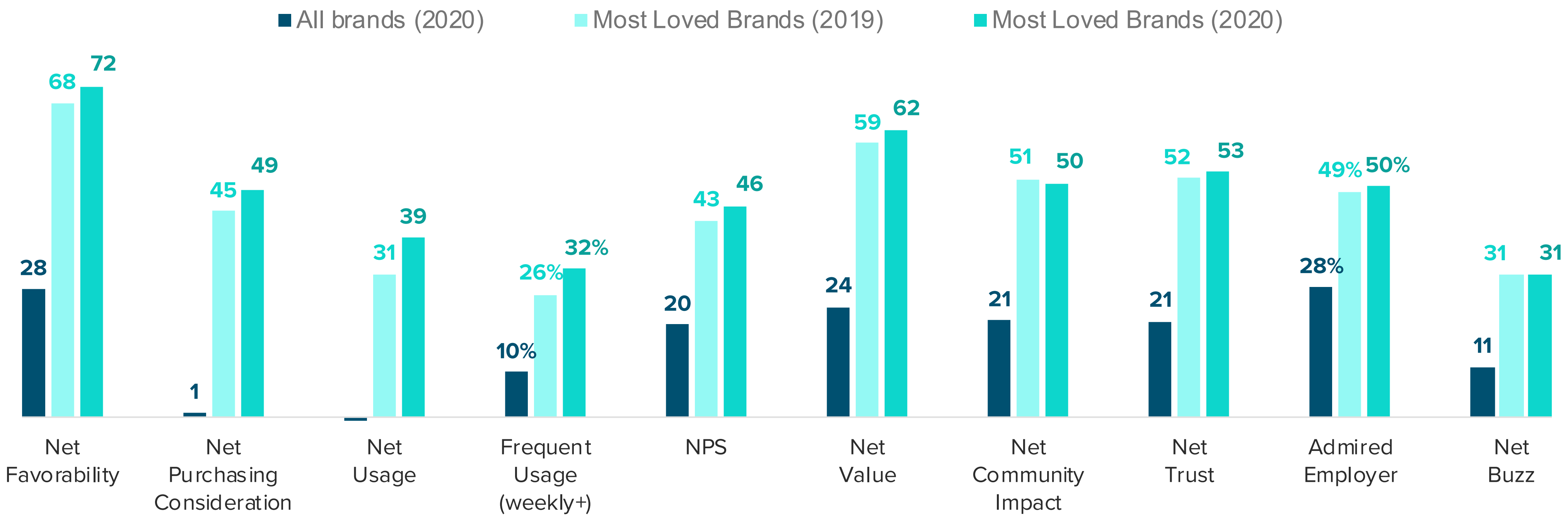
A crisis is a terrible thing to waste, and brand is a wonderful thing to capitalize on

The relationship between net usage and Morning Consult's brand KPIs has strengthened significantly since March 2020. This underscores that even in downturns, metrics such as favorability, trust, value, purchasing consideration, and even buzz matter: They become even more closely predictive of overall usage – as well as more frequent usage – when consumers' choices are limited and finances are strained.

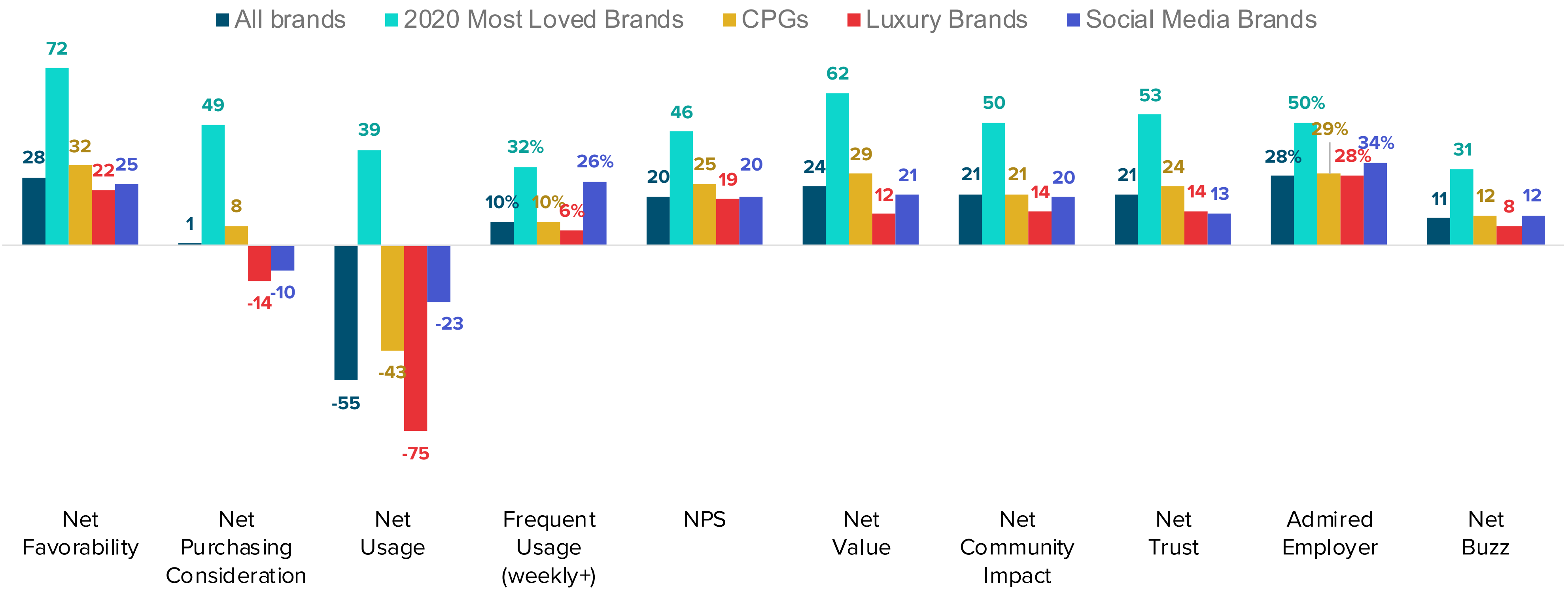
This also confirms a virtuous cycle: Brands performing better on these key metrics are generally used more in normal times. Then, when times get tough, people latch on to those brands they know best and love most – driving more usage and reinforcing most-loved brands' already-strong performance on KPIs.

Most Loved Brands significantly outperform during downturns

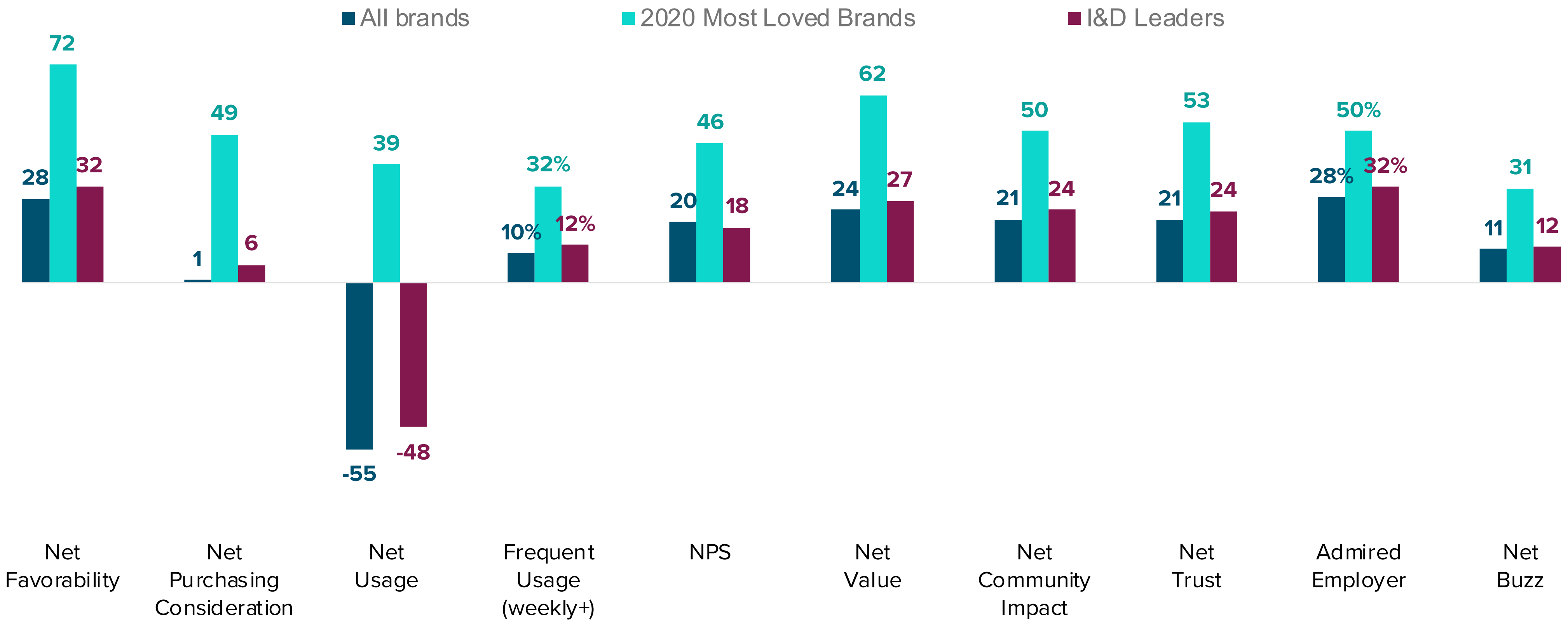
Despite a pandemic, 2020's Most Loved Brands improved across a number of metrics. Even more importantly, the gap between the brands that Americans love the most and all others continues to widen. This is especially evident when looking at key metrics such as purchasing consideration and usage. While these values decreased dramatically among all brands in recent months, they remained positive – and even improved year over year – among the Most Loved Brands, confirming that love is not only a winning trait in good times, but invaluable insurance in tough ones.



CPG and **Social Media** brands fared well in recent months while **Luxury** brands were outperformed by all brands on average



Companies celebrated for their leadership on **inclusion and diversity** also fared quite well in recent months



I&D leaders defined as brands who ranked on one or more diversity indexes including Forbes' Best Employers for Diversity, Refinitiv's Inclusion & Diversity Index, and Glassdoor's Top Companies for Diversity & Inclusion in 2019 or 2020

2

2020’s Biggest Gainers

A cross-category look at the brands gaining most since March across increasingly important KPIs during a trying and turbulent time for society, businesses, and consumers

About the Biggest Gainers

Biggest gainers in Brand Love improved most on their Brand Love Index score between March 1, before the coronavirus outbreak, and the end of July 2020.

Morning Consult also explored brands with the greatest improvements on certain metrics over that same time frame. We looked at net gains to highlight when the share of consumers feeling positively about a brand on key metrics outgrew the share feeling negatively about the brand – especially difficult to do in trying times.

- **Brand ID** increases highlight the brands able to cut through the chaos and grow awareness.
- Increases in **net favorability** reflect increasingly positive sentiment towards and affinity for brands consumers are aware of.
- Gains in **net trust** and **net community** impact are particularly telling during this unique time: as trust remains the foundation of strong relationships and community impact gains importance among today's socially-conscious consumer-citizens, brands improving on these traits – and those winning on all four – will likely be formidable into the future.

Biggest gainers in Brand Love

The biggest gainers in Brand Love since the coronavirus outbreak in March 2020 speak to the profound shifts in livelihoods and lifestyle that consumers experienced and the brands that were there for them amid this new reality, whether by delivering connectivity and accessibility (Zoom and Instacart), entertainment and inspiration (SpaceX and TikTok), or an outlet for stress-relief and self-care (Headspace).

	Brand	Category	Gain in Love Index since March 1	Current Love Index
1	zoom	Internet Services	+84.5	159.77
2	SPACEX	Aerospace and Defense	+34.0	107.45
3	TikTok	Social Media	+22.9	102.55
4	instacart	Food and Beverage Delivery	+21.5	102.28
5	headspace	Fitness and Self-Care	+19.8	47.87

Biggest gainers on the metrics that matter: **Brand ID**

Largest increases in brand awareness among U.S. consumers since March 1

Rank	Brand	Point gain
1	zoom	+31
2	Quibi	+23
3	peacock	+12
4	T	+10
5	instacart	+10
6	TikTok	+9
7	SPACEX	+9
8	GILEAD	+7
9	Calm	+7
10	SHAKE SHACK	+7
11	HBOmax	+5
12	WARBY PARKER	+5
13	Sands LAS VEGAS SANDS CORP.	+4
14	SoFi	+4
15	twitch	+4
16	Outshine	+4
17	Trolli	+4
18	BUD LIGHT SELTZER	+4
19	Zelle	+4
20	Natural LIGHT SELTZER	+4
21	NOVARTIS	+4
22	Genentech	+4
23	Tubi TV	+4
24	headspace	+4
25	WHITE CLAW HARD SELTZER	+4

Brands making noticeable gains in awareness since the coronavirus outbreak **captured consumer attention due to either novelty** – Quibi, Peacock, HBO Max, and even SpaceX given its newsworthy launch in late May – or **necessity**, as was the case with Microsoft Teams, Instacart, the various alcoholic beverage brands, and even the mindfulness apps which gained ubiquity during this tough and trying time.

Biggest gainers on the metrics that matter: **Net Favorability**

Largest increases in the share of U.S. consumers favorable toward a brand less the share unfavorable toward that brand since March 1

Rank	Brand	Point gain
1	zoom	+19
2	Roundup	+10
3	SPACEX	+7
4	JUUL	+6
5	TikTok	+6
6	Pfizer	+6
7	peacock	+5
8	HBO max	+5
9	diet pepsi	+5
10	T Mobile	+5
11	KEYSTONE LIGHT	+5
12	COMCAST	+5
13	Coca-Cola zero	+5
14	crocs	+5
15	gsk	+4
16	MONSANTO	+4
17	MERCK	+4
18	DIRECTV	+4
19	Lilly	+4
20	Unilever	+4
21	instacart	+4
22	tinder	+4
23	McDonald's	+4
24	UnitedHealthcare	+4
25	Diet Coke	+4

Spikes in favorability since March signify **increasing appeal, perception, and satisfaction among consumers aware of certain brands**, again indicating the brands that were present for consumers – and in potentially unexpected ways given the unprecedented situation. The rise of yard care (Roundup) and comfortable footwear (Crocs) fueled brand favorability as much as legacy brands offering critical and reliable products (Unilever) and welcome alternatives to isolation and loneliness (Tinder).

Biggest gainers on the metrics that matter: **Net Trust**

Largest increases in the share of U.S. consumers who trust a brand to do the right thing less the share who do not trust that brand to do so since March 1

Rank	Brand	Point gain
1	zoom	+20
2	Roundup	+9
3	SPACEX	+7
4	COMCAST	+6
5	McDonald's	+5
6	instacart	+5
7	TikTok	+5
8	Quibi	+4
9	NOVARTIS	+4
10	tinder	+4
11	peacock	+4
12	MONSANTO	+4
13	Marlboro	+4

Rank	Brand	Point gain
14		+4
15	Red Bull	+4
16	JUUL	+4
17	GILEAD	+4
18	HBO max	+4
19		+4
20	gsk	+4
21	Sprint	+3
22	UnitedHealthcare	+3
23	four Loko	+3
24	MERCK	+3
25	AstraZeneca	+3

In moments of strain, confusion, and need, **consumers flock to what they trust will provide either emotional comfort or functional reliability.** The ubiquity and functional consistency of Zoom and similar brands fueled their surge in trust over the last few months, while the enduring and nostalgic nature of McDonald's provided emotional consistency when the desire for familiarity was almost as high as the criticality of availability.

Biggest gainers on the metrics that matter: **Net Community Impact**

Largest increases in the share of U.S. consumers who say a brand has a positive impact on the community less the share who say it has a negative impact since March 1

Rank	Brand	Point gain
1	Roundup	+24
2	SPACEX	+8
3	CLOROX	+7
4	JUUL	+7
5	T	+7
6	instacart	+7
7	skype	+5
8	COMCAST	+5
9	TikTok	+5
10	McDonald's	+5
11	Quibi	+5
12	peacock	+5
13	KEYSTONE LIGHT	+5

Rank	Brand	Point gain
14	DOORDASH	+4
15	HBO max	+4
16	Marlboro	+4
17	Charmin	+4
18	Hennessy	+4
19	Captain Morgan	+4
20	tinder	+4
21	Coca-Cola zero	+3
22	T Mobile	+3
23	diet Mtn Dew	+3
24	Red Bull	+3
25	MONSANTO	+3

Brands perceived as having a positive community impact were a combination of **philanthropically active** in communities during periods of immense emotional, health-related, and financial strain (Instacart, McDonald's, DoorDash), **physically present** in stores and on channels where consumers were active (Comcast, Quibi, Keystone Light), and in many cases, **mentally available** as go-to brands guaranteed to meet key needs, having stood the test of time (Clorox, Marlboro, Charmin, Hennessy, Coke Zero).

3

Deep Dive: Categories

A category-level view of love, top brands within a category, and meaningful changes in sentiment across categories since COVID-19 disrupted choice and consumption in March

DEEP DIVE: CATEGORIES

1

Food & Beverage Delivery Brands Gained Since March, But Love for *Restaurants* is Higher

This suggests that while current needs may have driven short-term affinity for delivery services, long-term love for – and potentially loyalty to – traditional restaurants may be deeply entrenched.

2

Health Services Is the Only Category That Saw Significant Increases in Both Funnel Metrics and Other KPIs

Perhaps unsurprisingly, the category has led others in gains in favorability, likelihood to purchase, and usage as well as trust, community impact, admiration as an employer, and good/net value perceptions since March 2020.

3

Largest Changes in Usage Reflect Categories Most Affected by Slowed Spending and Lockdown Orders

Those that benefitted offered either convenience or a critical service; declines reflect encumbered shopping trips, as in the case of *Food & Beverage* and *Alcohol* products, or off-limits experiences, as with *Hotels, Casinos & Resorts*.

4

NPS Saw the Biggest Drop Pre-Pandemic to Now, With 24 Categories of the 47 Tracked Taking a Hit

Most categories seeing significant Net Promoter Score drops in the range of 4- to 5-points since early March are otherwise popular B2C categories: *Airlines, Apparel, Auto Manufacturers, Grocery, Restaurants, Retailers, Ride Share*, and *TV/Movie/Radio* brands. This metric was most likely impacted by how brands in these categories carried themselves or perhaps consumers' inability to either access or use these brands.

2020's Most Loved B2C Categories

Category	Brand Love Index	Change vs. March
Shipping & Logistics	175.9	1.1
Restaurants	157.6	-6.0
Food & Beverage Products	157.2	4.7
Household & Personal Products	149.4	-6.0
Pharmacies, Suppliers, & PBMs	143.8	-1.7
Virtual Assistants	143.7	-3.6
Retailers	138.6	-6.0
Television, Movies & Radio	132.3	-6.5
Consumer Electronics	129.2	-3.8
Social Media	128.5	1.5
Grocery	127.3	-6.1
Food & Beverage Delivery	125.3	4.5
Auto Manufacturers	124.5	-8.5
Telecommunications	124.5	0.7
Professional Sports	123.3	-4.9
Auto Services & Parts	122.3	-11.8
Apparel	108.4	-4.5
Auto Rentals	108.1	-11.0
Internet Services	104.3	-4.2
Recreational Vehicles	102.8	-2.6

Food & Beverage Delivery is among the biggest gainer in terms of Brand Love since March, but love for *Restaurants* remains significantly higher, suggesting that while **need may have driven short-term affinity for delivery services, long-term love for – and potentially loyalty to – traditional restaurants may be deeply entrenched.**

Biggest Gainers in Brand Love

	Category*	Gain in Love Index since March 1	Current Love Index
1	Health Services	+19.4	80.2
2	Pharmaceuticals & Biotech	+5.0	52.4
3	Food & Beverage Products	+4.7	157.2
4	Food & Beverage Delivery	+4.2	125.3
5	Chemicals	+3.8	102.3
6	Financial Services	+3.6	74.8
7	Technology	+3.0	72.5
8	Tobacco	+2.6	42.0
9	Health Insurance	+1.7	85.9
10	Social Media	+1.5	128.5

* Only B2C categories were ranked

Health Services (which includes brands such as CVS, Ancestry.com, and 23andMe) is the only category that saw significant increases in **likelihood to purchase**, **admiration as an employer**, and **good/net value** perceptions since March 2020.

DEEP-DIVE: CATEGORIES

The largest changes in net usage reflect categories most drastically affected by slowing consumer spending and stay-at-home orders

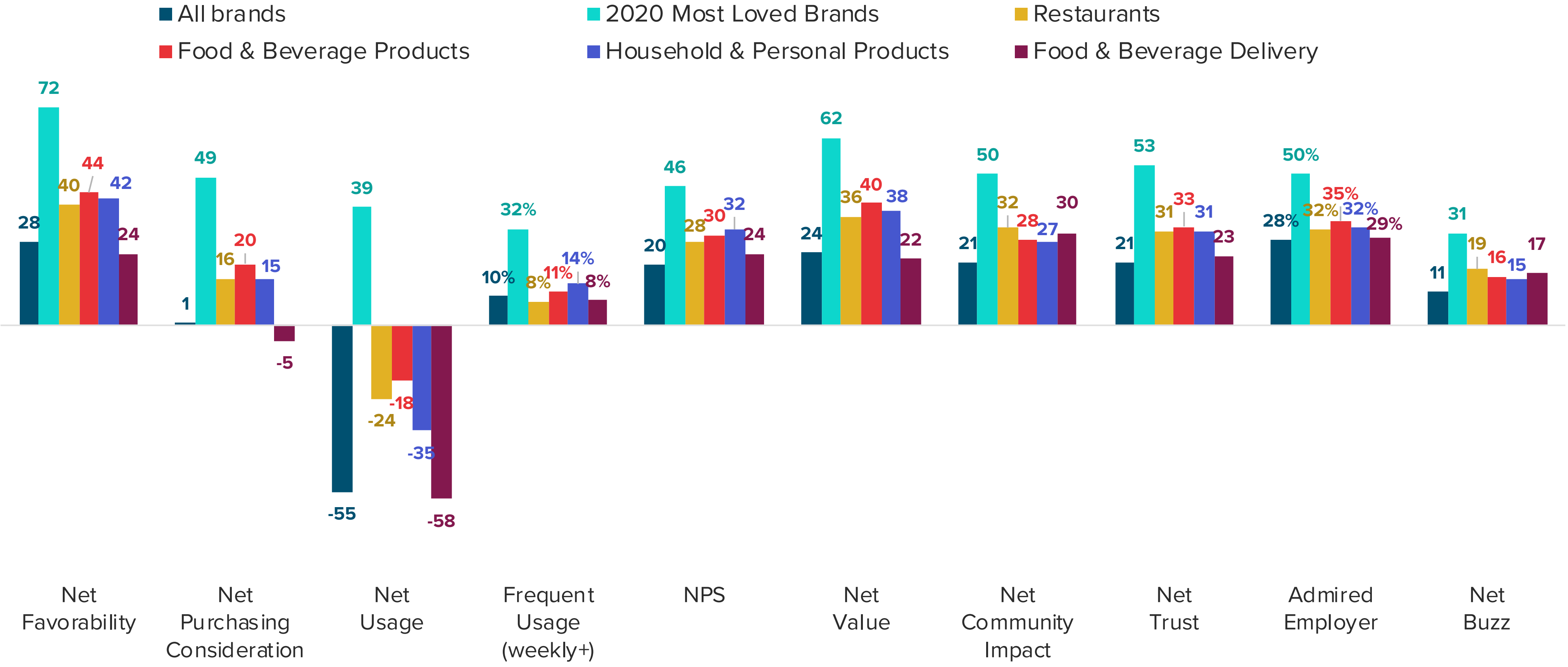
Largest **increases** in Net Usage

Category	Point change
Food & Beverage Delivery	+6
Social Media	+3
Telecommunications	+3
Health Providers	+3
Insurance	+3

Largest **decreases** in Net Usage

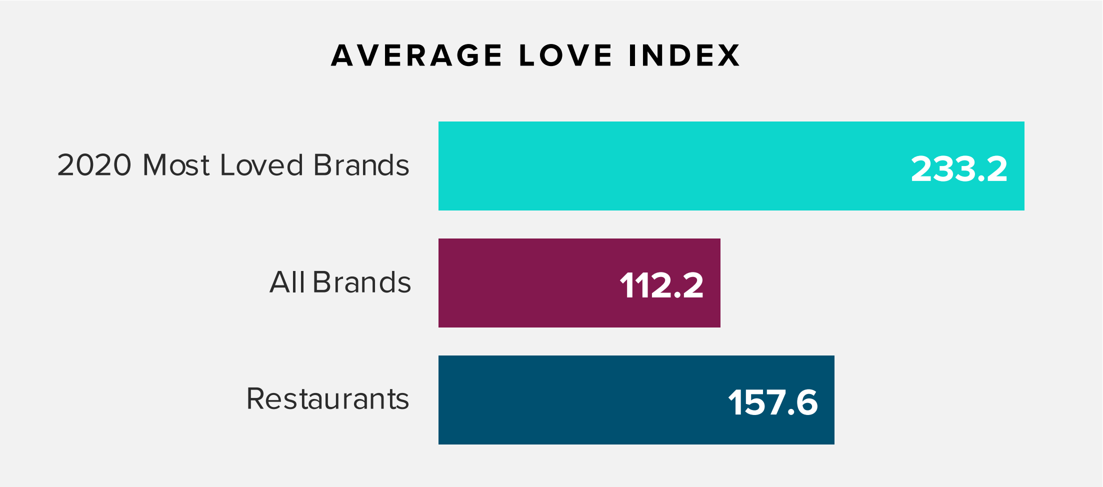
Category	Point change
Technology	-13
Business Services	-10
Health Services	-9
Food & Beverage Products	-6
Alcohol	-5
Pharmaceuticals & Biotech	-4
Hotels, Casinos, & Resorts	-3
Financial Services	-3

Still, even most loved and highest gaining categories have experienced significant drops in net usage in recent months



Most Loved Brands: **Restaurants**

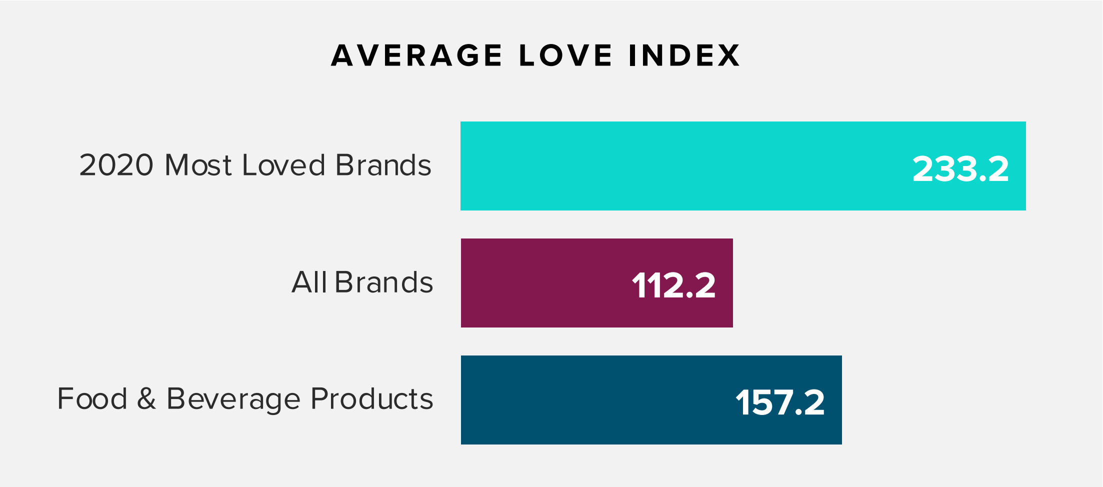
Brand	Love Index
Dairy Queen	**230.7**
Dunkin'	**226.9**
Chick-fil-A	**226.7**
Subway	**224.1**
Wendy's	216.8
Domino's	214.4
Baskin Robbins	212.3
Olive Garden	211.6
Pizza Hut	211.1
Taco Bell	204.2
McDonald's	198.4
Panera Bread	196.9
KFC	196.5
iHop	195.5
Outback Steakhouse	195.5
Starbucks	195.4
Little Caesars	194.6
Arby's	193.6
Burger King	192.2
The Cheesecake Factory	190.4



Also a 2020 Most Loved Brand

Most Loved Brands: **Food & Beverage Products**

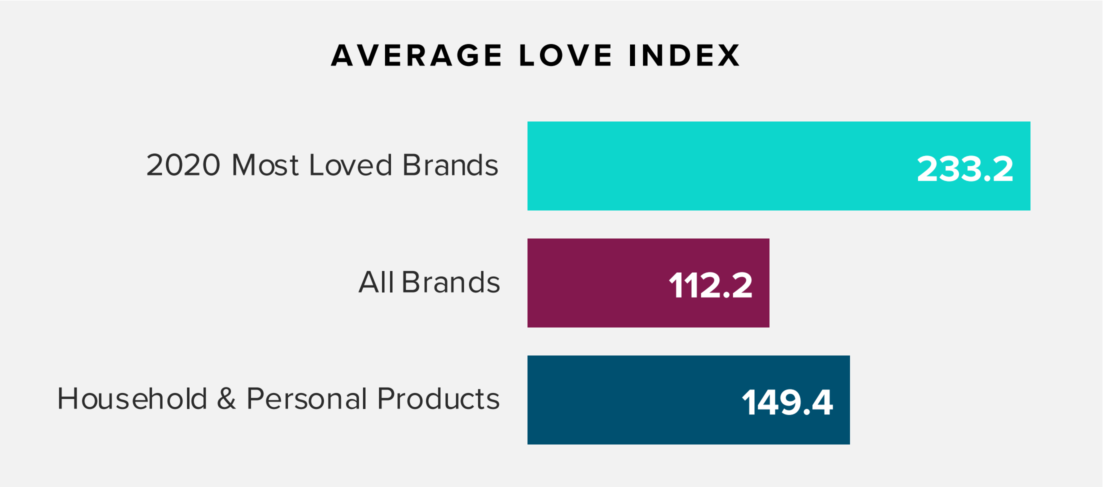
Brand	Love Index
M&M's	**244.1**
Cheerios	**240.4**
Kellogg's	**235.2**
Oreo	**233.3**
Hershey	**232.8**
Reese's	**232.3**
Heinz Ketchup	**231.9**
Doritos	**229.8**
Snickers	**229.7**
Kit Kat	**226.3**
Coca-Cola	**224.8**
Kraft	**222.1**
Ritz Crackers	**222.1**
Lay's	**220.7**
Rice Krispies	218.6
Frito-Lay	218.1
Chips Ahoy!	217.6
Jif Peanut Butter	217.5
Gatorade	216.9
Breyer's Ice Cream	216.1



Also a 2020 Most Loved Brand

Most Loved Brands: **Household & Personal Products**

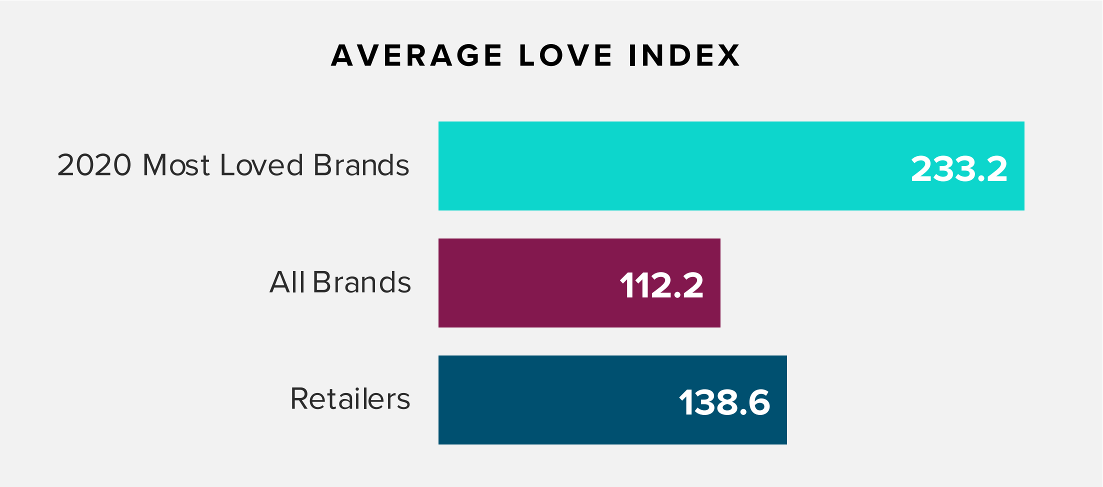
Brand	Love Index
Clorox	**246.4**
Ziploc	**236.2**
Dove	**235.2**
Tide Detergent	**234.1**
Colgate	**233.5**
Crest	**224.4**
Tylenol	**224.2**
Scotch Tape	**223.2**
Febreze	**220.6**
Charmin	**220.0**
Purell	213.2
Reynolds Wrap	209.5
Vaseline	204.8
Gillette	202.8
Hefty	202.3
Bounty	201.1
KitchenAid	200.8
Vicks	200.4
Benadryl	196.1
Gain Detergent	195.8



Also a 2020 Most Loved Brand

Most Loved Brands: **Retailers**

Brand	Love Index
Amazon.com	**255.9**
Home Depot	**241.8**
Target	**236.7**
Dollar Tree	**234.9**
Lowe's	**232.9**
Walmart	**232.4**
Costco	**224.0**
Best Buy	217.3
Bath & Body Works	211.6
Ace Hardware	210.9
Lego	207.6
Sam's Club	207.1
Family Dollar Stores	205.4
Barnes & Noble	204.3
Dollar General	204.0
Bed Bath & Beyond	199.3
Kohl's	198.3
Fisher-Price	198.2
Hallmark	189.3
Old Navy	184.8



Also a 2020 Most Loved Brand

4

Deep Dive: Key Audiences

A demographic-level look into the brands resonating most across generations, geographies, and genders

DEEP DIVE: KEY AUDIENCES

*Brands that rank in a given demographic's Top 50 Most Loved Brand list as compared to the Top 50 2020 Most Loved Brands, which is representative of all U.S. adults, are considered **standouts** among that demographic.*

1

Gen Z, Americans in the West, High Incomes, and Men Diverge Most in the Top Brands They Love

Gen X, Boomers, Women, Urbanites, and consumers in the South, meanwhile, especially agree with the general population on most loved brands – so much so that their average Love Index score for this year's Top 50 Most Loved Brands is notably higher than the average index score across all Americans overall.

2

Generation Z Loves Novelty, But Also Mirrors Their Elders' Soft Spot for Nostalgia

Gen Z is the only generation ranking digital disruptors and platforms among their most-loved brands, but they're also the only generation for whom certain more classic entertainment, apparel, and snack brands make the cut. Still, elder generations also have a special place in their hearts for long-lasting legacy brands that are reliable and have stood the test of time. This explains why so many established and legacy brands have outperformed their peers not only in terms of Brand Love, but also in market performance.

3

Different Demographic Groups' Standout Brands Reflect Nuances in Drivers, Culture, and Even Geography

Higher incomes have an affinity for brands that are higher-end and make them feel more in control, Urbanites are inclined towards brands that are customizable or personalized, and Northeasterners are more likely to buy brands recommended to them and have a love for those with local roots.

Standout brands by **generation**

Generation Z**

#1 Most Loved Brand:
YouTube

*Standout brands:**

- Spotify
- Apple iPhone
- Disney+
- Nintendo
- Nike
- PlayStation
- Hulu
- Instagram
- Apple
- Cartoon Network
- Pixar
- Twix
- Rice Krispies
- Krispy Kreme
- Apple AirPods
- Snapchat
- Gatorade
- Nickelodeon
- Vans
- Adidas
- Domino’s
- Pringles
- Skittles
- Starbucks
- Best Buy
- Cheez-It

Millennials

#1 Most Loved Brand:
Netflix

- Nintendo
- Disney+
- Android
- Gatorade
- Pixar
- Nike
- Sony
- Hulu
- PlayStation
- Ben & Jerry’s
- Apple
- Domino’s

Generation X

#1 Most Loved Brand:
United States Postal Service

- Campbell’s Soup
- Breyer’s Ice Cream
- Android
- Reynolds Wrap
- Frito-Lay
- Levi’s
- Purell
- AAA
- Samsung Galaxy
- Fisher-Price
- Betty Crocker

Baby Boomers

#1 Most Loved Brand:
United States Postal Service

- Ace Hardware
- Reynolds Wrap
- AAA
- Mayo Clinic
- Campbell’s Soup
- General Mills
- Pillsbury
- Chevrolet
- Betty Crocker
- Land O'Lakes
- Toll House Cookies
- Breyer's Ice Cream
- Smucker's
- Purell
- Bounty
- Levi’s
- Jif Peanut Butter

Brand is a standout among more than one generation
* Standout Brands do not appear in the Top 50 2020 Most Loved Brands list, which is representative of all U.S. adults, but do appear in the given demographic’s Top 50 Most Loved Brands list
** All survey respondents are U.S. adults at least 18 years of age

Standout brands by **generation**

1

Younger Generations Especially Love Bands Offering Entertainment, Innovation, and an Experience

Standout brands ranking for these generations but not others include Disney+, Hulu, Nintendo, and PlayStation along with Pixar, as well as Nike, Gatorade, Apple, and Domino's.

2

Despite a Love for Novelty, Generation Z Also Has a Soft Spot for Nostalgia

Gen Z is the only generation ranking Spotify, Instagram, Snapchat and Apple's iPhone and AirPods as top brands, they're also the only generation for whom more classic brands like Cartoon Network, Nickelodeon and Vans – as well as classic snacks like Rice Krispies and Cheez-Its – make the cut.

3

Older Generations Have a Special Place in Their Hearts for Brands That Have Reliably Stood the Test of Time

Standout brands ranking for these generations but not others include Campbell's Soup, Betty Crocker, and Breyer's Ice Cream, as well as Levi's, Purell, Reynolds Wrap and AAA.

Standout brands by **gender**

Women	Men
#1 Most Loved Brand: **United States Postal Service**	#1 Most Loved Brand: **United States Postal Service**
*Standout brands:**	
Bath & Body Works Purell Betty Crocker Pillsbury Breyer's Ice Cream	Gatorade Sony Android Wendy's Best Buy Domino's National Geographic AAA Frito-Lay

Women have a stronger affinity for personal care and home-related brands, while men are more drawn to technology, entertainment, and snack brands as well as those associated with spaces outside the home.

* Standout Brands do not appear in the Top 50 2020 Most Loved Brands list, which is representative of all U.S. adults, but do appear in the given demographic's Top 50 Most Loved Brands list

Standout brands by **income**

Lower incomes <$50,000	Middle incomes <$50,000 – $100,000	Higher incomes >$100,000
#1 Most Loved Brand: **United States Postal Service**	#1 Most Loved Brand: **Amazon**	#1 Most Loved Brand: **Netflix**
*Standout brands:**		
Rice Krispies Chips Ahoy Frito-Lay Frosted Flakes Wendy's Domino's	AAA Apple iPhone Apple Purell Best Buy	Apple Apple iPhone Apple iPad Amazon Prime Video Microsoft Windows National Geographic AAA Purell Trader Joe's Disney+ Verizon Panera Bread YMCA

Standout brands by income level reveal a clear divide in the brands that most resonate with and appeal to different audiences. While lower incomes have an affinity for accessible snack and restaurant brands, higher incomes are more inclined towards higher-end technology and services.

Brand is a standout among more than one income level

* Standout Brands do not appear in the Top 50 2020 Most Loved Brands list, which is representative of all U.S. adults, but do appear in the given demographic's Top 50 Most Loved Brands list

Standout brands by **region**

Northeast	South	Midwest	West
#1 Most Loved Brand: **United States Postal Service**	#1 Most Loved Brand: **Google**	#1 Most Loved Brand: **United States Postal Service**	#1 Most Loved Brand: **Costco**
*Standout brands:**			
AAA	Krispy Kreme	Aldi	Ben & Jerry’s
Ben & Jerry’s	Sam’s Club	Campbell’s Soup	AAA
Apple iPhone	Dollar General	Frito-Lay	Baskin Robbins
Purell	Frito-Lay	Jif Peanut Butter	Trader Joe’s
Apple	Jif Peanut Butter	General Mills	National Geographic
CVS Health	Chips Ahoy	Ace Hardware	Disney+
Breyer's Ice Cream	Domino’s	Betty Crocker	PetSmart
Best Buy		Wendy’s	Levi’s
Nike		Menards	Apple
Poland Springs			Apple iPhone
			Samsung Galaxy
			History Channel
			Nintendo
			Android
			Sony

- **Regional differences in Brand Love are most apparent in retailers,** with Sam’s Club, Aldi, and Costco as well as Trader Joe’s each earning rank in the South, Midwest, and West respectively.
- While the coasts are fonder of AAA, Ben & Jerry’s and Apple’s iPhone, the South and Midwest share affinities for classic CPG brands Frito-Lay and Jif Peanut Butter.

Brand is a standout among more than one region

* Standout Brands do not appear in the Top 50 2020 Most Loved Brands list, which is representative of all U.S. adults, but do appear in the given demographic’s Top 50 Most Loved Brands list

Standout brands by **residential area**

Urban	Suburban	Rural
#1 Most Loved Brand: **Google**	#1 Most Loved Brand: **United States Postal Service**	#1 Most Loved Brand: **United States Postal Service**
*Standout brands:**		
Nike Samsung Galaxy Best Buy Frosted Flakes Sony Ben & Jerry's Apple Domino's	AAA Apple Apple iPhone Purell Best Buy Microsoft Windows National Geographic	Jif Peanut Butter Pillsbury Betty Crocker Campbell's Soup Dollar General Chips Ahoy! Chevrolet Frito-Lay Taco Bell Ace Hardware

Standout most loved brands across residential areas vary in nature: While legacy consumer brands reign in rural areas, urbanites tend to favor more innovative technology brands (in addition to a few traditional go-to food brands).

Brand is a standout among more than one residential area

* Standout Brands do not appear in the Top 50 2020 Most Loved Brands list, which is representative of all U.S. adults, but do appear in the given demographic's Top 50 Most Loved Brands list

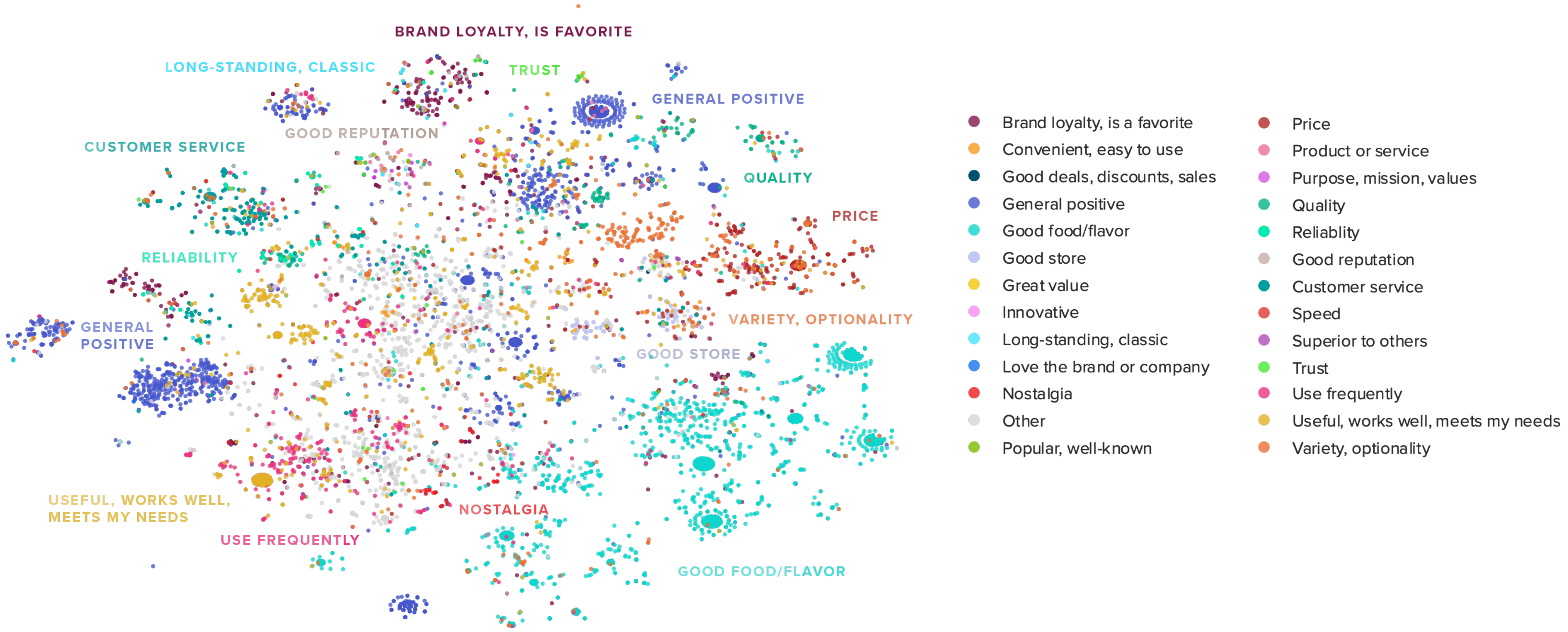
5

Drivers of Brand Love

A quantitative look at the brand attributes that drive Brand Love, differentiate winning brands, and rank as non-negotiable among today's discerning and demanding consumers

What drives Brand Love?

To gain preliminary insight on key qualities that drive Brand Love among U.S. consumers, Morning Consult applied AI to daily tracking data from Brand Intelligence to analyze more than 13,000 open-end responses detailing reasons behind favorability towards this year's most loved brands.



What drives Brand Love?

Morning Consult supplemented this qualitative, AI-powered analysis with quantitative research on 48 potential drivers of Brand Love to derive the relationship between the brand qualities that consumers rate as highly important to their purchasing decisions with top brands' performance on those attributes.

These Brand Love drivers fall into four categories. Drivers within each category show a statistical relationship with Brand Love, but the strength of that relationship and the extent to which different drivers matter to consumers and translate to brand performance varies.

Top Drivers

These drivers are table stakes for earning Brand Love. They include not only satisfying functional fundamentals and emotional essentials, but also staying attentive to stakeholders and demonstrating customer-centricity in all actions.

Differentiating Drivers

Beyond satisfying table stake needs, winning brands also outperform others on incremental qualities related to adding value to wallets, experiences, relationships, or society more broadly.

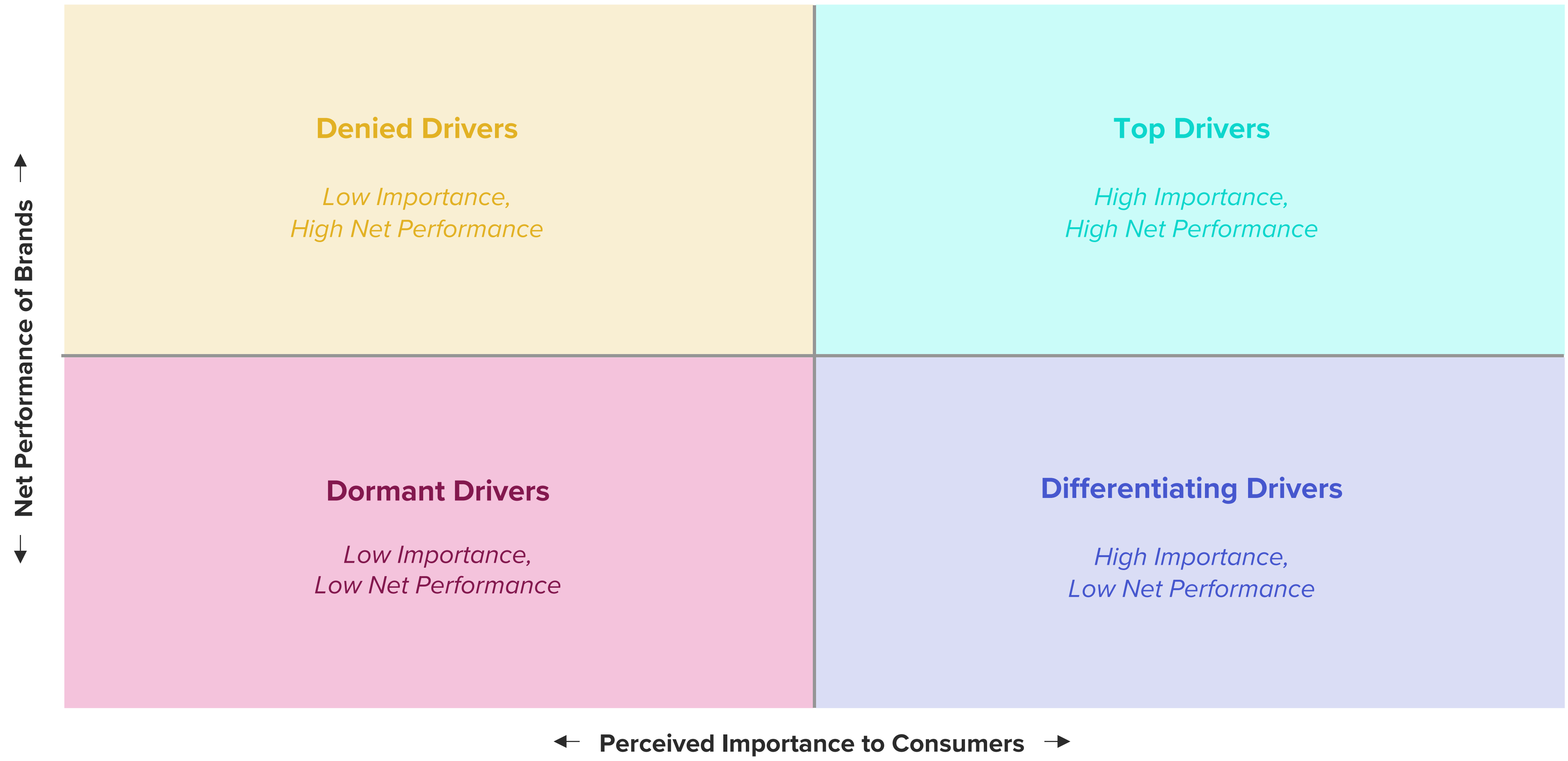
Denied Drivers

Certain qualities are subtly powerful: Consumers don't perceive them to play a role in their purchase decisions or brand preferences, but most loved brands have particularly high awareness and long legacies; advertising and popularity also play a hidden role in Brand Love.

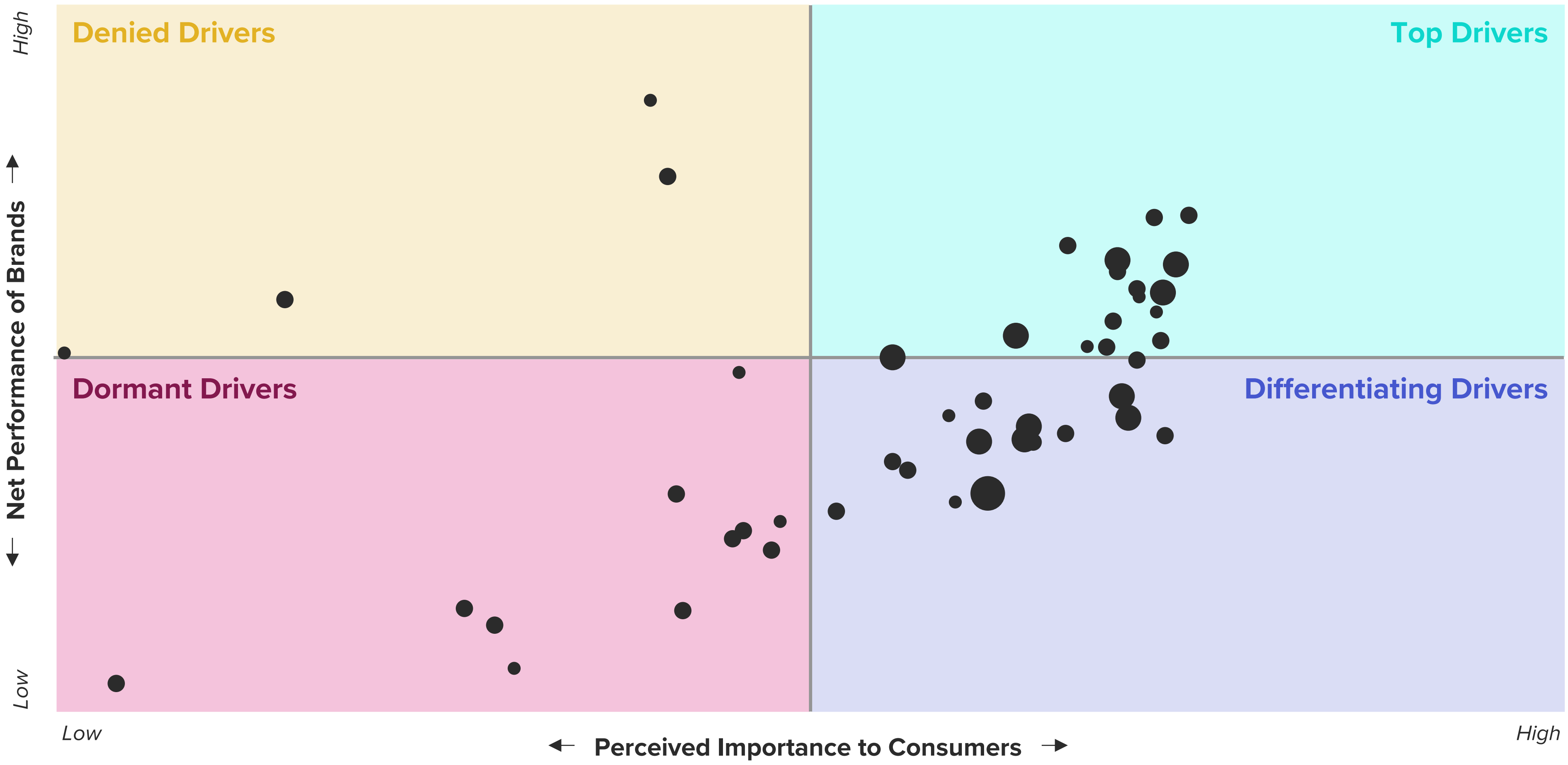
Dormant Drivers

Though related to Brand Love, some attributes are notably less important to consumers and not particular strengths of most loved brands: low costs, local impact, and nostalgia, uniqueness, control or even self-expression may be nice to have features, but they're by no means essential.

Drivers of Brand Love



Drivers of Brand Love



● Average net performance across 2020 Most Loved Brands

Size corresponds to difference in net performance (most loved brands vs. others)

Top Drivers of Brand Love: **Promises Delivered & Experiences Humanized**

Top Drivers

High Importance, High Net Performance

These are correlated with love, rated as net important to +50% consumers, and most loved brands have a net performance of +50%

● Average net performance across 2020 Most Loved Brands

Size corresponds to difference in net performance (most loved brands vs. others)

Top Drivers of Brand Love: **Summary**

High

← **Net Performance of Brands** →

Promises delivered & experiences humanized

Table stakes of winning brands include not only satisfying functional fundamentals like reliability, reputation, and availability and emotional essentials like trust, ease of experience, and quality, but also staying attentive to stakeholders and demonstrating customer-centricity in all actions taken.

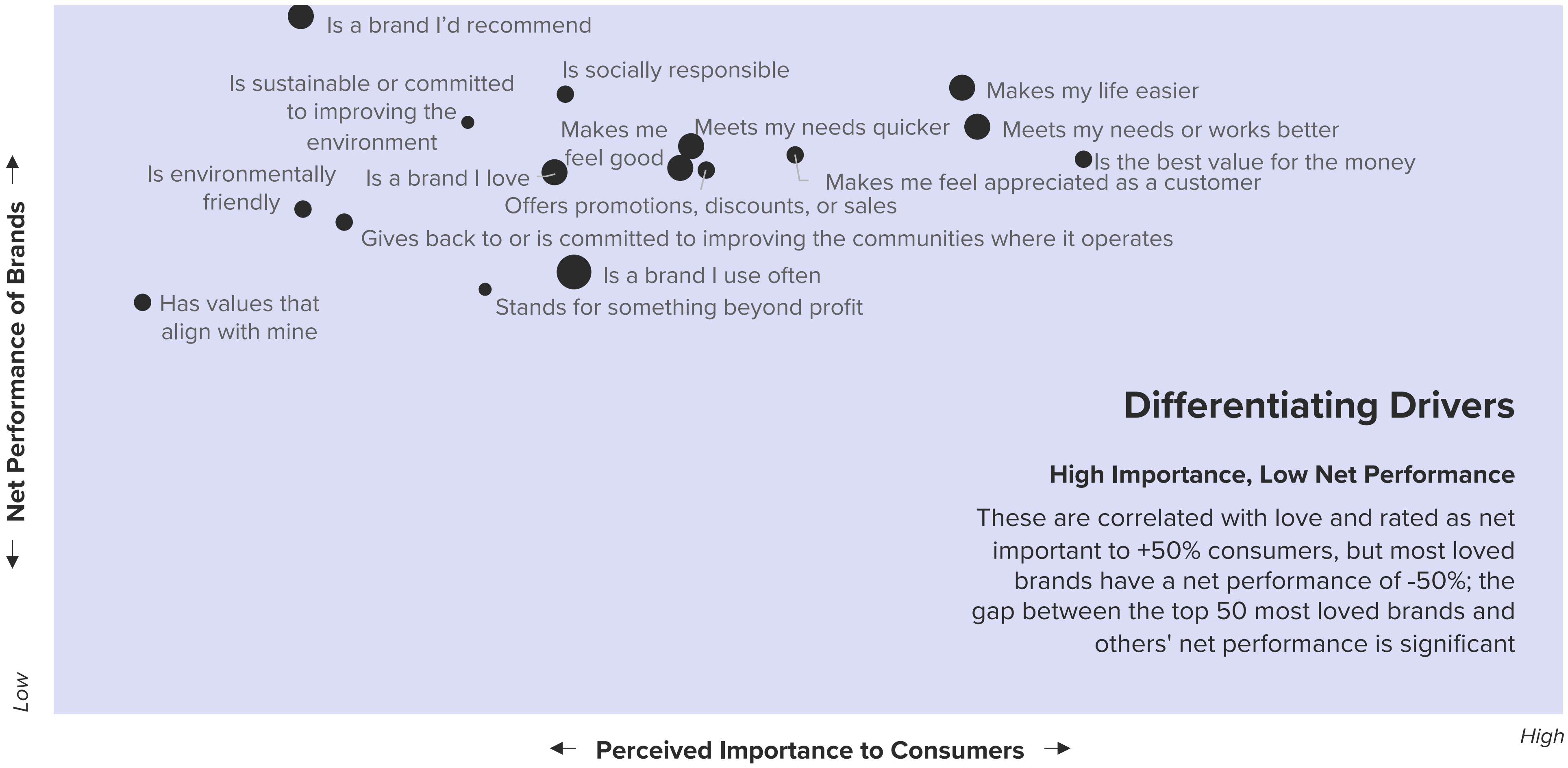
Correlated with love, rated as net important to +50% consumers, and most loved brands have a net performance of +50%

1. Is reliable
2. Has a good reputation
3. Has the products I need available when I need them
4. Is available in the places / on sites where I often shop
5. Is a brand I trust
6. Has an easy and seamless shopping experience
7. Meets a high standard of quality
8. Offers variety
9. Cares about customers' wants and needs
10. Respects and protects customers' privacy and security
11. Has helpful customer service
12. Is focused on providing timely and relevant solutions to evolving customer needs
13. Always does what is best for customers, even in challenging times
14. Acts and communicates authentically, honestly, and with transparency
15. Takes care of their employees and treats them well, even in tough times
16. Has an easy or better purchasing experience

High

← **Perceived Importance to Consumers** →

Differentiating Drivers of Brand Love: **Value Added & Powered by Purpose**



Differentiating Drivers

High Importance, Low Net Performance

These are correlated with love and rated as net important to +50% consumers, but most loved brands have a net performance of -50%; the gap between the top 50 most loved brands and others' net performance is significant

● Average net performance across 2020 Most Loved Brands

Size corresponds to difference in net performance (most loved brands vs. others)

Differentiating Drivers of Brand Love: **Summary**

Value Added & Powered by Purpose

Beyond satisfying table stake needs, winning brands also outperform others on incremental qualities related to adding value to wallets, experiences, relationships, or society more broadly

Correlated with love and rated as net important to +50% consumers, but most loved brands have a net performance of -50%. The gap between the top 50 most loved brands and others' net performance is also significant.

1. Makes my life easier
2. Meets my needs better or works better than alternatives
3. Is the best value for the money
4. Makes me feel appreciated as a customer
5. Is socially responsible
6. Meets my needs quicker than alternatives
7. Offers promotions, discounts, or sales
8. Makes me feel good
9. Is sustainable or committed to improving the environment
10. Is a brand I love
11. Is a brand I'd recommend
12. Is a brand I use often
13. Gives back to or is committed to improving the communities where it operates
14. Is environmentally friendly
15. Stands for something beyond profit
16. Has values that align with mine

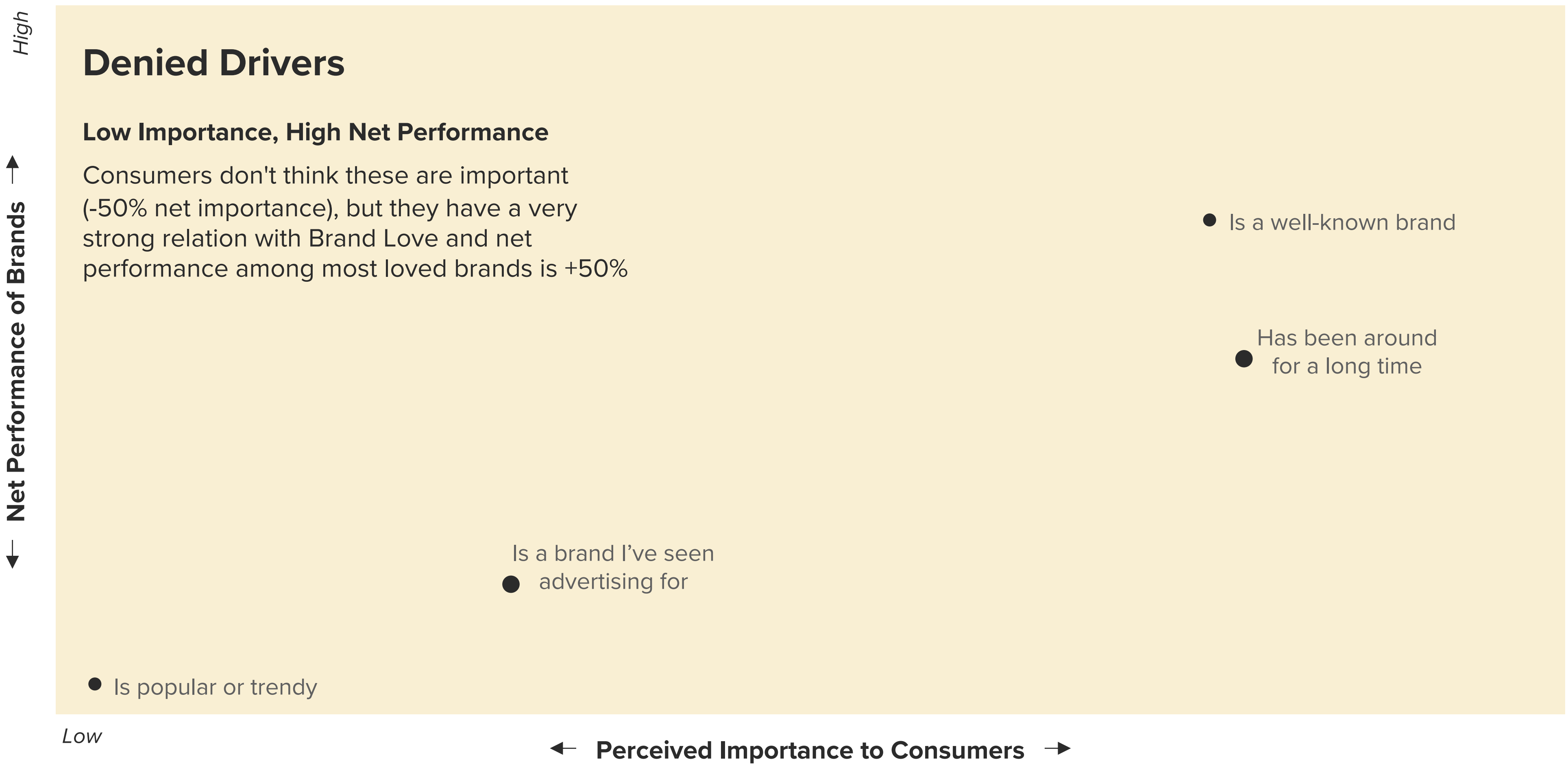
Net Performance of Brands

Low

High

Perceived Importance to Consumers

Denied Drivers of Brand Love: **The Lure of Legacy & Identity**



● Average net performance across 2020 Most Loved Brands

Size corresponds to difference in net performance (most loved brands vs. others)

Denied Drivers of Brand Love: **Summary**

High

Net Performance of Brands

The Lure of Legacy & Identity

Certain qualities are subtly powerful: consumers don't perceive them to play a role in their purchase decisions or brand preferences, but most loved brands have particularly high awareness and long legacies; advertising and popularity also play a hidden role in Brand Love

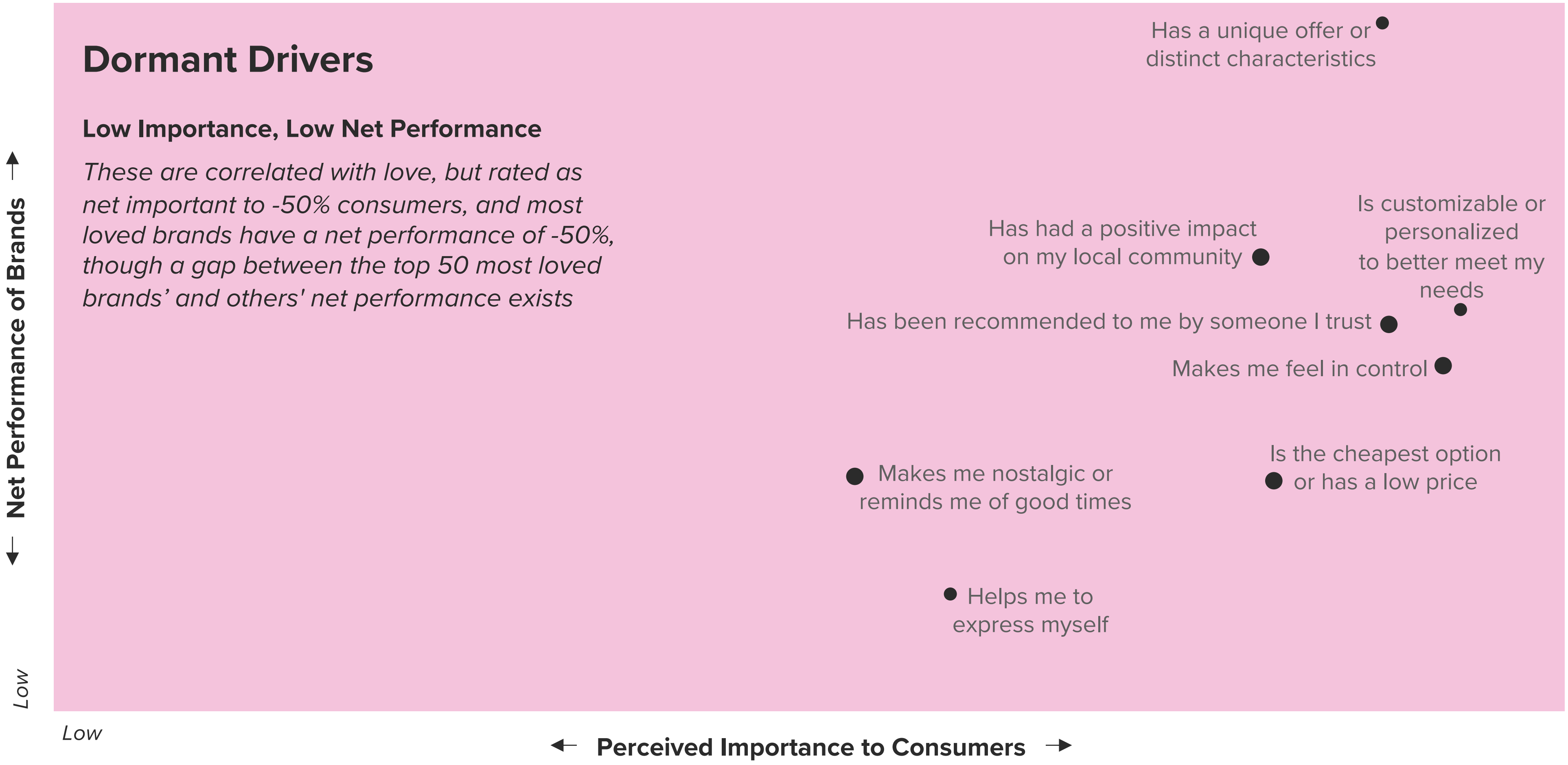
Consumers don't think these are important (-50% net importance), but these have a very strong relation with Brand Love and net performance among most loved brands is +50%

1. Is a well-known brand
2. Has been around for a long time
3. Is a brand I've seen advertising for
4. Is popular or trendy

Low

Perceived Importance to Consumers

Dormant Drivers of Brand Love: **Nice-To-Have**



Average net performance across 2020 Most Loved Brands

Size corresponds to difference in net performance (most loved brands vs. others)

Dormant Drivers of Brand Love: **Summary**

Nice-To-Have

Though related to Brand Love, some attributes are notably less important to consumers and are not particular strengths of most loved brands: low costs, local impact, and nostalgia, uniqueness, control or even self-expression may be nice to have features, but they're by no means essential

Correlated with love, but rated as net important to -50% consumers, and most loved brands have a net performance of -50%, though a gap between the top 50 most loved brands' and others' net performance exists

1. Is the cheapest option or has a low price
2. Has had a positive impact on my local community
3. Has been recommended to me by someone I trust
4. Makes me nostalgic or reminds me of good times
5. Has a unique offer or distinct characteristics
6. Is customizable or personalized to better meet my needs
7. Makes me feel in control
8. Helps me to express myself

← **Net Performance of Brands** →

Low

Low

← **Perceived Importance to Consumers** →

Four qualities were ultimately non-drivers, unrelated to Brand Love

The weak relationship between each of these attributes and overall Brand Love suggests that while they may play a role in capturing customer attention, dimensionalizing relationships, or standing out from competitors, they aren't pivotal for forging the strong and enduring connection Brand Love affords.

1. Has a good loyalty or rewards program
2. Is fun or entertaining
3. Is new or innovative
4. Is prestigious, exclusive and/or signals status

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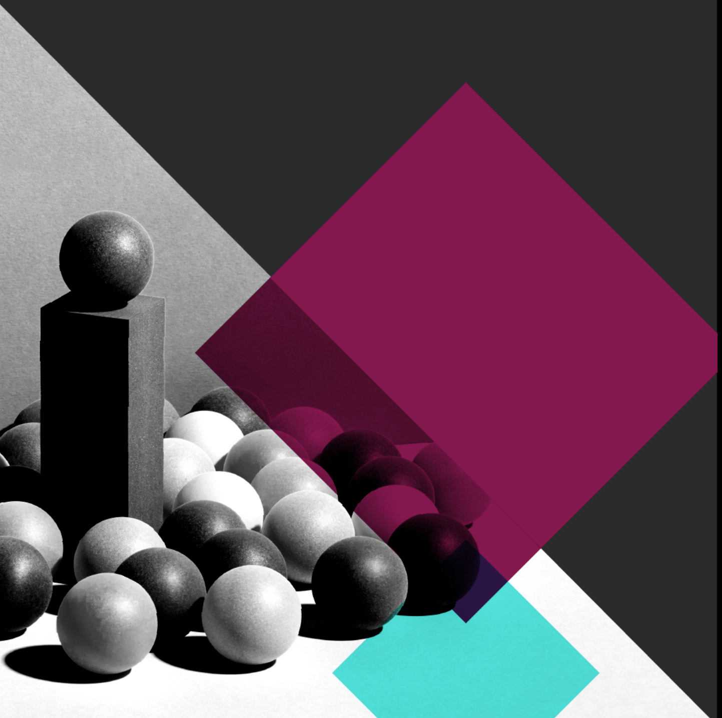

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Formerly at Kantar, Victoria has extensive client experience ranging from established industry leaders to high-growth tech companies and spanning B2B and B2C organizations across industries. She is a repeated co-author of Kantar’s annual BrandZ reports and a co-founder of WPP’s Institute for Real Growth.

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