VOXBURNER
REPORT 2014

YOUTH 100

THE UK'S TOP BRANDS ACCORDING TO 18-24s

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Introduction

This is the third year of the Youth 100: The UK's Top Brands According To 18-24s.

Already in its short life this research has grown to become a must-read among marketers interested in the youth audience. It has brought insight and raised eyebrows. With almost 300 extra brands thrown into the mix this year and nine new categories, there's plenty to ponder again.

We've learned a lot about young people from this research. We've discovered that they have more mainstream ways than we are often led to believe by 'yoof' gurus, uninspired creative directors and hurried journalists. The young person presented so often through media is rarely the moderate, aspirational 18-24 that speaks to us in this research.

We've seen that to be a successful youth brand it appears you must be able to answer yes to one or more of these questions:

Do you make young people's lives easier?
Do you make young people's lives more fun?
Do you save young people money?

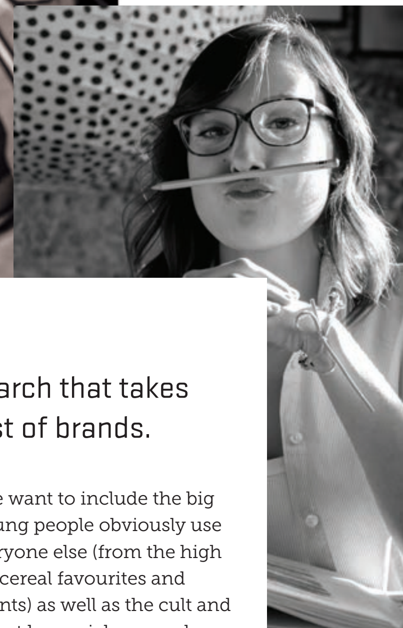
Scan down the Youth 100 list and marvel at how many are ticking these criteria.

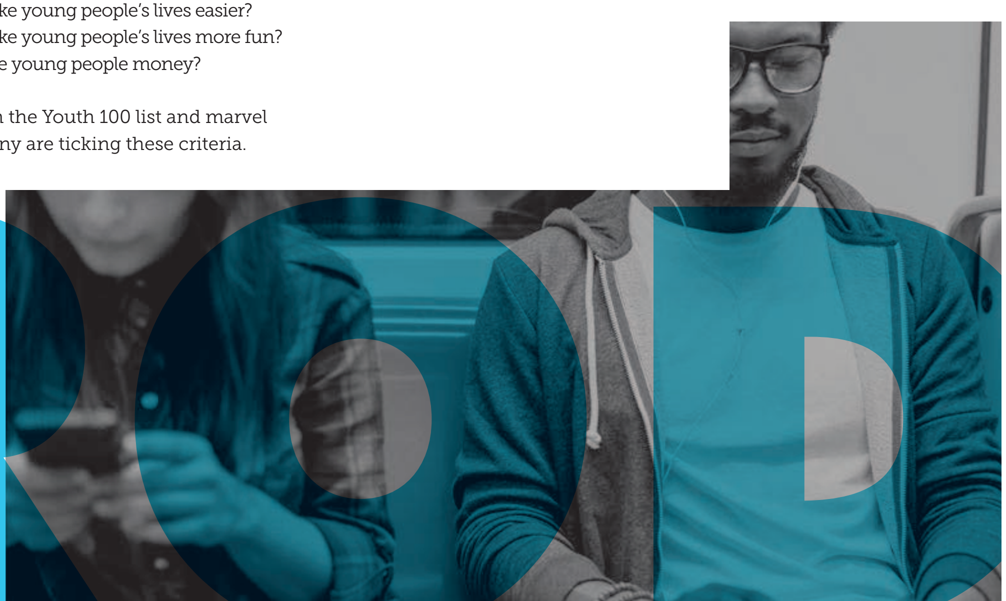
Talking about the appeal of the Youth 100 recently, one marketer said: "All brands are self-obsessed! They're desperate to see how they rank against others." But before getting too excited or dispirited at a ranking change, there's a lot for brands to remember when reading the results – including the fact we added so many more brands to the survey this year.

Some categories are very hard to compete against. How can an internet service provider ever hope to be more popular than a chocolate maker?

Really, the most important figures here are not the overall rankings, but the sentiment scores: is your brand loved or hated...or does it arouse no feeling whatsoever?

That's what the 550-odd brands here should be reflecting on and responding to.





Methodology

The Youth 100 is an extensive piece of research that takes place each summer. It begins with a long list of brands.

We compile all the brands that impact the daily lives of young people, from the moment they wake up, wash, eat breakfast and buy coffee, to the time before they switch off and sleep.

We look at the brands that actively market to young people and those discussed in social media by 18-24s. We speak to young people themselves about the brands that matter to them.

With a long list of hundreds of brands we then work to edit this down to a shortlist of around 550. This is a practical shortlist that we can effectively present to over 3000 young people and discover their sentiment. It's a size that provides the chance for diversity as well as credibility – we want to include the big brands that young people obviously use along with everyone else (from the high street stores to cereal favourites and technology giants) as well as the cult and rising brands that have niche appeal. The final shortlist is ultimately decided by a committee of youth marketing professionals and 18-24s.

With the shortlist decided, we create an online survey that allows users to choose their feeling towards each brand. They are presented with the brand name, its category, and a choice of: 'love', 'like', 'no feeling', 'dislike' and 'hate'. Each user rates their sentiment towards around 50 randomised brands.

Our survey respondents are sourced from two places: 60% weighting is given to a nationally representative sample of UK 18-24s registered on the research database of Cint, a globally-recognised panel, while 40% weighting is given to UK 18-24s on the research database of Student Beans. This mix is to provide a balanced sample of UK youth. Top brands are those that achieve the highest combined score of loves and likes.

It's important to note that two new categories in this year's Youth 100 have a different shortlist criteria.

'Universities' were shortlisted based on the results of the National Student Survey. We looked at the top twenty universities as rated by their students, but discounted small universities from this list with under 10,000 students. We then presented the question to respondents: "Thinking of these universities as 'brands', which do you think has the strongest identity?" The same sample group of young people from across the UK stated their sentiment towards all 20 universities.

For 'Graduate Employers' we looked at The Times Top 100 Graduate Employers, presented the top twenty names and asked student-only respondents: "Thinking of these brands as employers, which is most appealing to you?"

This different methodology recognises the unique nature of these two categories and aims to provide a more useful brand sentiment context than would be achieved as part of the overall Youth 100 survey.

Findings

Within this report you'll find out what dozens of experts say about the results category-by-category, so there is no need to steal their thunder here.

But reflecting on some of the overall findings this year, we've realised that 'hot' brands – those that appear to be having their moment, the focus of media attention and watercooler chat – often take a while to impact among wider youth. It's a reversal of the idea that young people are always ahead of trends; in fact, like other demographics, there are early adopters and laggards among 18-24s. It shouldn't be assumed that all young people are trend leaders.

An example is Kopparberg. For many watchers it was the big drinks brand of last year, and for some even earlier, but it's taken the Swedish cider until this summer to really make its mark among wider youth and win the Alcohol category, achieving a record positive sentiment of 75%, the highest ever for an alcohol brand in the Youth 100.

Also last summer we heard that Snapchat was blowing up among young people: a new, intimate and disposable way to share photos among select friends. Its performance in the Youth 100 however did not reflect the apparent hype. But this year it has jetted from 41% positive sentiment to 72%, a remarkable rise.

Among other notable risers, Microsoft has leaped up to 87% positive sentiment – an astonishing score for a brand lampooned elsewhere as a geeky, corporate dinosaur.

That's not how young people see them. Only 5% have negative sentiment and the brand has topped its category above cool kids Apple and Beats. In separate Youth 100 focus groups Microsoft's Surface tablet was cited often as an "awesome" product.

Boots is a brand young people find hard not to like, lowering its negative sentiment score from 4% to 1% this year and jumping to 84% positive sentiment from 70%. British heritage brands that young people nostalgically associate with their upbringing have often scored well.

New Look has had a strong year this time, up to 81% positive sentiment from 65%. Ikea, Netflix, Lidl, Dove and Zara are other eye-catching improvers.

It was reassuring that the vast majority of our new entries for this year ended up in the bottom half of the results. Why? Because these were the additional under-the-radar brands we identified as deserving a chance, not the 'must includes' that first leapt out to us when we shortlisted in 2012 and 2013. So a low score suggested no oversight had been made. But among the new entries that do give us a slap on the hand for forgetting them are Tropicana (straight in at number 11 – wow), Kinder, Magnum and Warner Bros.

Looking at those that have lost sentiment this year, Superdry has dropped ten points to 29% positive sentiment. Always a 'Marmite' brand (either loved or hated) it seems to be losing its fans in the fickle world of fashion. Focus group participants pointed to the ubiquitous use of their logo on their clothes as off-putting: "They have hundreds of different coloured t-shirts but they all say Superdry across them".

Last year's favourite high street bank, NatWest, has fallen below all of its big rivals. Is there a correlation with its nine point fall and the seven point rise of Santander, who wrestled ownership of the dealbreaking student account incentive – the free railcard – from them last year?

Other noteworthy drops came from Lynx (51% to 37% positive sentiment), Red Bull (53% to 41%) and Dell (55% to 42%).

I hope you enjoy this report and encourage you to get in touch with questions and comments. You can reach me on luke@voxburner.com

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Meet the contributors

Kevin Stevens, The Guardian
Kevin joined Guardian News and Media in 2010 and currently works as an insight manager in the Audience department. His primary role is to provide strategic insight and analysis to Guardian Labs - the Guardian's own branded content agency that specialises in telling brand stories. As well as this he is also responsible for working on primary research projects such as the award-winning Audiences not Platforms planning tool. Kevin is also a regular contributor to the Digital Media Trends blog on the Guardian's website. Prior to this he began his insight career in local media at The Newspaper Society.

Gaby Jesson, Radiator PR
Gaby has been working in youth marketing for nearly 25 years and is still loving it. Her work has covered sport, fashion and entertainment brands. From Nike to the Mobo Awards, Swatch to David Beckham. Her career started out in sports marketing and she then enjoyed a rollercoaster three years at Lynne Franks. That creative experience was invaluable but also gave Gaby the chance to handle PR for some of the biggest youth brands including Coca Cola and Puma and she helped launch the new Mini. Currently she co-owns Radiator with Lorna Milliken – specialising in youth and family brand PR, social and marketing.

Stergios Bititsios, Cambridge Design Partnership
Stergios is a design strategist who brings consumer science, marketing research, human-centred design and engineering together to help global brand owners shape their innovation pipeline and add successful products, packaging and services in their brand portfolios. Specialising in the front end of innovation but with experience across the entire supply chain, Stergios works with the world's leading FMCG companies, such as Unilever, Coca-Cola, Nestle and Reckitt Benckiser to help them capture and prioritise business and market insights and translate those into commercially viable solutions.

Joeri Van den Bergh, InSites Consulting
Joeri is the co-founder of InSites Consulting, a global 'new generation' research agency with offices in New York, London, Sydney, Rotterdam and Ghent. He has extensive experience of all aspects of branding, marketing and advertising to kids, teens and young adults. His clients include global customers such as Lego, Nokia, Sony, MTV Networks, Danone, Unilever and Coca-Cola, for whom he has provided youth research and advice on how to target the youth market. As co-author of the award-winning book How Cool Brands Stay Hot: Branding to Generation Y, he also lectures throughout the world on marketing topics. More information: www.howcoolbrandsstayhot.com

Natalie Waterworth, Talented Heads
Natalie is a digital content marketer, a blogger, and a millennial engagement expert. She co-founded Talented Heads, a digital marketing agency specialising in digital content marketing and the millennial generation. Over the past three and a half years she has worked with and for a variety of technology start-ups in London's vibrant Tech City, both as a co-founder and as a consultant. At Talented Heads Natalie advises corporates on how they can better use their digital strategy to communicate with millennial employees and millennial customers.

Johary Rafidison, Grayling
Johary's key focus is on social media research, analytics and evaluation. At Grayling, he seeks to innovate, helping clients qualify their return on investment. He is also responsible for developing new tools and methodologies for generating digital/social insights. This includes social listening, network/community analysis, influencer identification, data manipulation and visualization. Johary's most recent work includes the Brand 5, Hilton Worldwide and PayPal.

Michael Litman, Burst & Brandsonvine

Michael is a former PR and ad strategist, now founder of micro-content publishing specialist, Burst. Catering for the mobile-first generation, Burst delivers training, workshops, consultancy and video production to brands and agencies globally. Since February 2013, he also founded and runs Brandsonvine, the industry leader and go-to source in the industry leader for data, intelligence and analysis in the six second storytelling space. Clients include Samsung Mobile, Pepsi, Marmite, Vita Coco and Argos.

Lara Piras, Brand Strategist

Lara is a freelance writer, researcher and brand strategist with a strong focus and even stronger love of youth culture. Her vast knowledge comes from previous stints at MTV, WGSN, Vogue UK and Vogue US in New York. She has worked on youth research projects for brands including Channel 4, SUPRA and Peroni and has an eye for spotting the next best thing in music and fashion, teamed with a love of photography and writing. She is regular contributor to Voxburner.com on youth trends.

Steve Mullins, brand-e

Steve is content director of brand-e and works as a consultant storyteller, developing narratives with words and design in brand proposition strategies. A former agency copywriter, he has also been editor of a number of media and communications publications and has worked as a digital media analyst and consultant in London and Paris.

Sophia Nadur, Ideas 2 Launch Ltd

During more than 15 years' experience at Coca-Cola, Mars, Unilever, Kraft and Nicoventures, Sophia developed and led complex marketing and innovation activities across multiple categories in Europe, China, the USA, Central America and the Caribbean – including snacks, confectionery, beverages and even e-cigarettes. A qualified lawyer and regular industry blogger, Sophia recently hung up her corporate "boots" to launch her own London/Shanghai based company called Ideas 2 Launch Ltd which is helping both large and small companies offer consumers "better for you" food and drink products.

Claire Hutchinson, vInspired

Claire leads the marketing and communications strategy for vInspired. She previously worked as Head of Marketing for Eurostar and was founding project director at One Young World, an initiative to connect young social change-makers across the world. She is committed to working closely with young people to help them reach their potential and make the changes they want to see to society.

Mark Wingett, M&C Report

Mark is an award-winning journalist who has edited M&C Report, the leading newswire, which offers intelligence and analysis for the licensed retail and foodservice markets, since the end of 2011 and before that he spent two years at the title and its sister publications Hotel Report and Leisure Report as news editor. Between his two stints on M&C Report, he spent three years as head of media relations at leading property adviser Christie + Co. He has previously worked in and reported on the UK's retail sector.

Linda Jack, Children and Young People Now

Linda joined the Army aged 17 and served as an analyst in Special Intelligence. She has spent the rest of her career working with or on behalf of young people, also serving as Chair of Unison's Youth and Community Workers Forum and a member of the JNC for Youth and Community Workers. In 2004 she took up the role of Youth Policy Adviser at the FSA, responsible for the UK wide strategy to help vulnerable young people manage their money more effectively.

Alex Spencer, Mobile Marketing Magazine

At 25, Alex is just far enough out of the 18-24 bracket to be talking about 'them' rather than 'us'. As online editor of Mobile Marketing Magazine, he watches and writes about brands as they explore apps, the mobile web and whatever technology has captured the marketing zeitgeist this month. Mobile Marketing celebrates the best of these efforts with its annual Effective Mobile Marketing Awards. Away from mobile, Alex writes about videogames for the likes of IGN and The Escapist, and just about every bit of pop culture that catches his eye on his blog, Alex-Spencer.co.uk

Bronwen Morgan, Impact

Bronwen spent six years as a qualitative and quantitative researcher – specialising in healthcare and education and working with global brands including GSK, Pfizer, BP, RBS, BBC and Kellogg's – before retraining as a journalist. She is now deputy editor at research-live.com and Impact magazine, the Market Research Society's website and quarterly magazine, where she writes news and features connected to the world of insight.

Dan Beynon, SMRS

Dan is Head of Education at SMRS, one of the UK's leading people communications businesses. For more than 16 years SMRS have worked with many household name brands and world-leading institutions. With an award-winning and market-leading position in market intelligence, research, planning, account management and media buying – combined with branding, creative and production expertise – Dan is proud to say SMRS offers full-service communications for its clients.

Paul Le Fevre, Wild Fig
Paul is the founder and director of unique youth media agency, Wild Fig. Having worked in marketing for a number of years producing successful bespoke multi-platform campaigns for the likes of Nike, adidas, Puma, Calvin Klein, Sony, K-Swiss and Levi's, he has, along the way, tackled firsthand the ever changing landscape in the way youth consume media. With this experience in hand he launched his own agency in 2014 with a view to help brands connect with this hard to reach and often unpredictable demographic. Wild Fig is a modern media agency with a deep seeded network spanning beyond traditional media plans. Paul also manages UK brand partnerships for millennial media owner Complex.

Hannah Russell, Blloon
Hannah is Head of User Engagement and Content at recently launched ebook app, Blloon. After a few years working in Berlin, she recently returned to hometown London. She has worked in digital, publishing and mobile with stints at device maker HTC and B2B ebook platform txtr.

Andrew Wardlaw, MMR Research Worldwide
Before joining MMR Research Worldwide as Insight Director, Andrew spend 20 years working with brands on the manufacturer side – primarily across innovation and communications. Having helped tip Old El Paso into the mainstream, he has flirted with certain Myers-Briggs types on Haagen-Dazs, hiked with Nature Valley types, experienced a life with raised cholesterol for Benecol and been totally surrounded by toddlers for Ella's Kitchen. He is driven by a need to see something that others don't. He likes to make connections between different research strands by flying high above the trees and letting his intuition kick in. Sometimes it doesn't kick in – which can be frustrating and often the result of a late night.

Tamara Gillan, Cherry London
Tamara is CEO of Cherry London, which she founded in 2009 after heading up e-Marketing at Orange and setting up an integrated agency. Today Cherry London is one of Europe's fastest growing agencies specialising in brand partnerships. Tamara is the driving force behind Cherry London's unique and highly-effective marketing programmes, which have attracted leading brands such as O2, Aviva, Premier League, Western Union, Pernod Ricard, Unilever, Simple, and Small Luxury Hotels of the World.

James Read, Student Beans
James is a technology enthusiast and is editor of the UK's popular website for 18-24s, Student Beans. Formerly editor at arts and culture site Don't Panic, he's been writing for young people for over four years. In his spare time he runs pop-up restaurant ArtForEating.

Dan Hawes, Graduate Recruitment Bureau
Dan is the co-founder and Head of Marketing at Graduate Recruitment Bureau (GRB), the UK's leading independent recruitment consultancy for students, recent graduates and experienced graduates. Established by two graduates in 1997, GRB's experts have helped and placed over 600,000 students and graduates with FTSE 250 and fast growing recruiters in all sectors across the world.

Fay Nyberg, Writer
Another one of Voxburner.com's regulars, after completing her Magazine Journalism MA in Sheffield Fay worked as a lifestyle journalist specialising in fashion and beauty writing for online and print publications. She was then lured into the world of marketing, where she spent four years managing the content departments of some of the UK's most successful digital agencies, working on client content marketing and PR projects. Now living back in her native North East, Fay specialises in writing about marketing and lifestyle topics and their crossover. She has a particular fondness for food, ecommerce, fashion and beauty.

Emily Cramp, Thinkhouse UK
Emily heads Thinkhouse UK, the youth communications agency that has been connecting brands with 18-35s since 2001. Fresh to the UK market, Thinkhouse opened its London office almost a year ago. Emily's track record in brand strategy, social media, publicity and digital work has led to campaigns being used as best in class across the world. Emily has spearheaded campaigns for some of the world's biggest brands to including; Heineken, Diet Coke, Coca Cola, Ben & Jerry's and eBay and is enjoying bringing Thinkhouse's signature approach to the UK market. Emily has a penchant for disco and all things youth-culture. And likes to have fun along the way.

Share your expertise
Voxburner works with the experts. From reports and research to media stories and events, we are always keen to hear from industry specialists who are engaged in the topic of 16-24s and have something to add to content. If you'd like to join Voxburner's contact list and give your perspective in future publications and more, email **luke@voxburner.com**

YOUTH 100 The UK's Top Brands According To 18–24s

1	amazon.com	▲ 1
2	YouTube	▼ 1
3	Google	NO CHANGE
4	Cadbury	▲ 2
5	Ben & Jerry's	NO CHANGE
6		▲ 3
7	BBC	▼ 3
8	Microsoft	▲ 21
9	Pringles	▼ 1
10	Boots	▲ 21
11	Kinder	NEW ENTRY
12	Tropicana	NEW ENTRY
13	ebay	▼ 1
14		▼ 4
15	Warner Bros.	NEW ENTRY
16	facebook	▼ 9
17	Magnum	NEW ENTRY
18	4	▼ 8
19	Walkers	▼ 5
20	Doritos	▼ 3
21	Domino's	▲ 2
22	New Look	▲ 30
23	skype	▼ 4
24	H&M	▼ 4
25	Heinz	NO CHANGE
26	IKEA	▲ 20
27	Sony	▼ 17
28	Netflix	▲ 75
29	Cornetto	NEW ENTRY
30	Nivea	NEW ENTRY
31	Nestlé	NEW ENTRY
32	Dove	▲ 32
33	Disney	NEW ENTRY
34	Coca-Cola	▼ 14
35	Thorntons	NEW ENTRY
36	Costa Coffee	▼ 1
37	Pizza Express	▼ 4
38	PayPal	▼ 25
39	BBC Children in Need	NEW ENTRY
40		NEW ENTRY
41	Krispy Kreme Doughnuts	▲ 18
42	Superdrug	NEW ENTRY
43	McCoy's	▼ 27
44	WHSmith	▲ 12
45	Primark	▲ 6
46	Subway	▼ 6
47	Kopparberg	▲ 20
48	Samsung	▼ 1
49	Waterstones	▼ 6
50	Odeon	▼ 2
51	Fanta	NEW ENTRY
52	Sure	▲ 17
53	Herbal Essences	NEW ENTRY
54	Morrisons	▲ 4
55	Mars	NEW ENTRY
56	Tesco Every little helps	NEW ENTRY
57	Nando's	▼ 27
58	Converse	▼ 3
59	Cancer Research UK	▼ 48
60	wetherspoon	▼ 24
61	Haribo	▼ 39
62	ASDA	NEW ENTRY
63	Adobe	▲ 10
64	itv	NEW ENTRY
65	Comic Relief	▼ 44
66	Marks & Spencer	NEW ENTRY
67	Debenhams	NEW ENTRY
68	Sainsbury's	NEW ENTRY
69	asos	▲ 20
70	Spotify	▲ 5
71	Greggs	▼ 34
72	Frankie & Benny's	NEW ENTRY
73	Poundland	NEW ENTRY
74	Kipling	NEW ENTRY
75	Wrigley's	NEW ENTRY
76		NEW ENTRY
77	RSPCA	NEW ENTRY
78	iTunes	NEW ENTRY
79	Kettle Chips	▼ 55
80	wilkinson	NEW ENTRY
81	Pizza Hut	▼ 54
82	hmv	▼ 44
83	Kingsmill	▼ 38
84	Help for Heroes	NEW ENTRY
85	4	▼ 44
86	Lidl	▲ 35
87	British Red Cross	NEW ENTRY
88	Vaseline Intensive Care	▼ 56
89	Robinsons	NEW ENTRY
90	Nikon	NEW ENTRY
91	The co-operative	NEW ENTRY
92	Soap & Glory	NEW ENTRY
93	simple	NEW ENTRY
94	We are Macmillan. Cancer Support	NEW ENTRY
95	next	NEW ENTRY
96	nus	▼ 30
97	Warburtons	▼ 55
98	Zara	▲ 2
99	PG tips	NEW ENTRY
100	Just Eat	NEW ENTRY

ALCOHOLIC DRINKS

It's been another tough year for the drinks industry as alcohol taxes continue to depress demand. According to new figures from the British Beer and Pub Association, we are drinking 18% less than we were 10 years ago.

It's no surprise then that attracting new buyers to the industry is taken so seriously, with a huge effort placed on landing brands that appeal to the 18-24 age group.

These results show once again that the brands which have harnessed experiential marketing techniques (think music festivals) and social media can do well. Kopparberg is riding high again this year, commanding most love with the younger drinker. Its investment in music festivals such as Urban Forest and Ja Ja Ja have given the brand the edge over last year's winner Smirnoff. One of the biggest risers is Rekorderlig, which is taking the provenance route to connect with its audience. The younger set have an inherent need to signal their category knowledge and discerning taste to their peers. We speculate that many young people are already 'moving on' from Kopparberg to Rekorderlig in an attempt to be seen with something different.

> We speculate that many young people are already 'moving on' from Kopparberg to Rekorderlig in an attempt to be seen with something different.

Discernment should not be underestimated as a trend with this demographic. It means that today's stars could easily fall from grace if they stand still. It also means that mass-produced brands have to find ways to present themselves as less conventional and mainstream. The 2014 placings continue to favour cider over beer. We think this is partly due to the former's more immediate appeal to both sexes. In addition, the sheer volume of flavour innovation in the cider category is providing ample opportunity for the younger drinker to experiment. Beer companies will be exploring the flavour route, but we believe it's more difficult to deliver a fruit beer that a broad range of consumers will readily accept. Currently, Heineken-owned Desperados is leading the way in a sector known as 'Speers' - meaning spirit beers. We expect further launches in this sector which is already host to Amigos, Curvana, Dead Crow, Buddy's and Bachata.

Another dimension to beer innovation is the emergence of craft beers. With the increased volume of government, industry and societal messages about responsible drinking, we are detecting a movement away from quantity to quality of drinking experiences, and craft beers fit well with this dynamic. Talking with the bartenders of London who serve this demographic night after night, cocktails have become popular, exemplifying the shift towards a higher quality drinking experience. "The younger drinker likes things to be bespoke. They like things to be tailored. Most individuals will have a fail safe cocktail, but they are more ready than ever to experiment."

In summary we see the Youth 100 as a perfect reflection of what we hear on the ground. This group is seeking quality and value, and favour premium brands because they are synonymous with delivering a better taste and higher quality drink.

YOUTH 100

Andrew Wardlaw
Insights Director,
MMR Research Worldwide

ALCOHOLIC DRINKS TOP BRANDS

	HATE	DISLIKE	NO FEELING	LIKE	LOVE	OVERALL
KOPPARBERG	3%	7%	15%	42%	33%	**75%**
SOURZ	3%	16%	20%	43%	18%	**61%**
SMIRNOFF	4%	11%	24%	46%	15%	**61%**
REKORDERLIG	6%	6%	30%	27%	31%	**58%**
JÄGERMEISTER UK	8%	16%	19%	39%	18%	**57%**
MALIBU	9%	21%	17%	38%	15%	**53%**
ABSOLUT VODKA	11%	13%	26%	36%	14%	**50%**
JACK DANIELS	8%	19%	24%	32%	17%	**49%**
WKD	8%	19%	24%	34%	15%	**49%**
BAILEYS	9%	16%	28%	34%	13%	**47%**
BROTHERS	5%	9%	40%	32%	14%	**46%**
BUDWEISER	5%	23%	27%	28%	17%	**45%**
DESPERADOS	7%	10%	38%	29%	16%	**45%**
CORONA	6%	19%	30%	31%	14%	**45%**
CARLSBERG	7%	26%	26%	31%	10%	**41%**
BACARDI	5%	26%	29%	35%	5%	**40%**
VK	6%	28%	29%	31%	6%	**37%**
LAMBRINI	11%	17%	36%	27%	9%	**36%**
GORDON'S GIN	8%	21%	36%	25%	10%	**35%**
STRONGBOW	8%	30%	28%	24%	10%	**34%**

Where overall totals are same, higher 'love' percentage determines position. Only top 20 shown. For full placings, see back section.

APPS sponsored by BLLOON

Apple's Tim Cook announced recently that the number of apps in the App Store had surpassed 1.2 million, bringing them roughly into line with the number in Android's Google Play.

This new Youth 100 category provides some much needed data on a crowded and expanding marketplace. More isn't necessarily better though - only the top seven apps in this list receive higher positive scores than they do neutral and only two brands are loved more than any other sentiment. Youth love for apps is clearly skewed to just a select few brands.

> In such an overcrowded space, app brands have to work harder to combat antipathy.

With the well-documented decline of SMS and the seemingly unstoppable rise of eponymous messaging services, it's no surprise that the category is dominated by messaging and social, with Whatsapp clearly leading the pack and almost 50% of the brands in this list ticking the social box. 42% of respondents love Whatsapp, and 0% check the 'hate' box – it has cemented its position as the go-to communication app of choice for young people, perhaps because it's faster and more adaptable than its competitors with images and group chats as standard.

The absence of the standard Facebook timeline app is notable, but following the company's massive acquisition of Whatsapp earlier this year, the mandatory migration to their standalone Messenger app and their ownership of Instagram, they still dominate the top end of the category, occupying the first, third and fourth spots. After reportedly batting off a cash offer from Facebook earlier this year, Snapchat remains independent and is unsurprisingly edging towards the top of the table, as confirmed by recent research showing that its used more than voice calls by 18 year-olds for frequent communication with friends and family.

As the only non-messaging app in the top five, Nike+ secures its position as much more than a sporting brand. Effective use of social media – the #MakeItCount hashtag has over 280,000 posts on Instagram alone – shows the ability of Nike+ to bridge both social and sports.

Mobile devices are at heart designed to allow people to communicate with each other, and this research confirms that the young generation of today have not veered far from this. The shift comes instead in the diversity of apps and platforms that are now being used to achieve it. Young people have no qualms about using a multitude of different messaging and social services for different purposes.

The apps category is a new addition to the report this year making it difficult to ascertain what the shift has been, but with so many of these apps new entrants to the overall brand list it would seem that we are witnessing the convergence of apps into major mainstream youth brands.

However, in such an overcrowded space, app brands have to work harder to combat antipathy towards them, with brands like Uber and Viber struggling with upwards of 70%.

YOUTH 100

Hannah Russell
Head of User Engagement and Content, Blloon

APPS TOP BRANDS

	HATE	DISLIKE	NO FEELING	LIKE	LOVE	OVERALL
WHATSAPP	0%	4%	19%	35%	42%	**77%**
SNAPCHAT	3%	10%	16%	35%	36%	**71%**
MESSENGER	2%	8%	32%	43%	15%	**58%**
INSTAGRAM	4%	11%	31%	23%	31%	**54%**
NIKE +	2%	11%	35%	28%	24%	**52%**
SHAZAM	1%	7%	43%	35%	14%	**49%**
MY FITNESS PAL	1%	4%	48%	31%	16%	**47%**
PINTEREST	0%	8%	45%	32%	15%	**47%**
VINE	2%	7%	46%	29%	16%	**45%**
SOUNDCLOUD	1%	5%	49%	31%	14%	**45%**
TINDER	6%	16%	55%	17%	6%	**23%**
VIBER	1%	8%	70%	14%	7%	**21%**
UBER	1%	4%	75%	15%	5%	**20%**
MUSIC MAGPIE	3%	16%	61%	17%	3%	**20%**
KIK	2%	15%	75%	7%	1%	**8%**
STRAVA	1%	7%	87%	4%	1%	**5%**
MALLZEE	0%	6%	91%	3%	0%	**3%**

Where overall totals are same, higher 'love' percentage determines position. Only top 20 shown. For full placings, see back section.

BEAUTY AND PERSONAL CARE

With the rise of the selfie, one would be forgiven for thinking that in 2014, beauty and personal care brands would be contenders for the top spots in this year's shortlist of the Youth 100.

But with only two beauty and skincare brands in the top 50, it seems that beauty brands are just not hitting the mark. 18–24s are sticking with reliable brands they know. Given this category connects with young people daily, there's a huge opportunity to innovate, capture imaginations and turn function into fans.

2014 sees 'Health and Beauty' split into ' Retail' and 'Beauty and Personal Care'. The category shake up has meant brands like Boots (last year's number 1) were bumped off to retail and made room for 29 new brands to capture the hearts, minds and skin of 18-24 years olds.

Encouragingly, in 2014 there is a jump in the category's performance overall with 20% more beauty and personal care brands making the top 100. The brands that are winning with 18-24s are those with simple, natural or uncomplicated benefits and messaging.

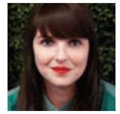
Nivea has stolen the top spot; its clear product offering and positioning resonates well, and its campaign with 'Redknapp's Grassroots Round-Up' giving scathing reviews of amateur football performances tapped into the banter and humour of young football fans. Dove, Simple, Vaseline and The Body Shop all star in the category top ten. As with food categories, youth demographics are more conscious of what's inside products, and therefore favour unprocessed and trusted brands. This audience also has a conscience, and relate to brands with a conscience too.

And in Dove's case, consumer insight, mixed with incredible online content, delivers beauty. It's no surprise that Dove has gained a higher position this year at number 2. We know that 18-24s demand brands to be authentic, and being made think by tapping into real issues, shows they understand the audience, that is authentic. 2013's critically acclaimed 'Real Beauty Sketches' set the brand firmly in the minds of young people, and its 'Self-Esteem Project' continues to strike a chord with the young through 2014.

The number one thing young people want from brands on social media (Thinkhouse Youth & Brands Report 2013) is to be entertained, and Soap & Glory's bolshy and engaging approach has paid off, landing the brand in 96th place overall and 5th in the category.

There is a common misconception that 18-24s aren't brand loyal, but now more than ever young people feel there is a role

YOUTH 100



Emily Cramp
Managing Director, Thinkhouse

for brands in their lives. They relate to brands that make their lives better, easier or add value to their daily grind. And as this is the first generation that has grown up with digital, they're used to digital solutions and expect brands to behave the same. There's a huge opportunity to drive this category with digital and social engagement that is real and excites this next generation of beauties.

BEAUTY & PERSONAL CARE TOP BRANDS

	HATE	DISLIKE	NO FEELING	LIKE	LOVE	OVERALL
NIVEA	0%	3%	18%	52%	27%	**79%**
DOVE	1%	3%	17%	60%	19%	**79%**
SURE	0%	4%	21%	53%	22%	**75%**
VASELINE	2%	4%	24%	47%	23%	**70%**
SOAP & GLORY	0%	4%	28%	38%	30%	**68%**
SIMPLE	1%	3%	28%	41%	27%	**68%**
RIMMEL	0%	4%	31%	48%	17%	**65%**
MAYBELLINE	2%	5%	29%	38%	26%	**64%**
NO. 7	0%	5%	32%	41%	22%	**63%**
RADOX	1%	4%	32%	52%	11%	**63%**
DUREX	1%	2%	35%	43%	19%	**62%**
ANDREX	1%	2%	35%	45%	17%	**62%**
GARNIER	1%	3%	34%	46%	16%	**62%**
LUSH	4%	6%	29%	39%	22%	**61%**
MAXFACTOR	1%	7%	32%	45%	15%	**60%**
BARRY M	2%	6%	33%	36%	23%	**59%**
IMPULSE	1%	7%	35%	37%	20%	**57%**
NEUTROGENA	1%	4%	38%	42%	15%	**57%**
GILLETTE	0%	4%	39%	45%	12%	**57%**
CLINIQUE	2%	6%	39%	34%	19%	**53%**

Where overall totals are same, higher 'love' percentage determines position. Only top 20 shown. For full placings, see back section.

CHARITIES & CAMPAIGNS sponsored by vInspired

To what end a youth brand? Fundamentally, marketing is about changing or reinforcing behaviour – buy more of our products, join our campaign, tell your friends how great we are.

Yet what inspires us to do our best work is the challenge posed by an audience which is at once innovative, anxious, brave and opinionated. What's clear from the Youth 100 report is that there are many things going on for 18-24 year-olds at the moment. This is a generation that has grown up with a global recession, the banking crisis, broken promises (see Iraq and tuition fees) and true globalisation,

CHARITIES & CAMPAIGNS TOP BRANDS

	HATE	DISLIKE	NO FEELING	LIKE	LOVE	OVERALL
CHILDREN IN NEED	1%	4%	17%	55%	23%	**78%**
CANCER RESEARCH	2%	1%	23%	41%	33%	**74%**
COMIC RELIEF	1%	3%	23%	52%	21%	**73%**
RSPCA	2%	4%	23%	41%	30%	**71%**
HELP FOR HEROES	0%	4%	26%	43%	27%	**70%**
BRITISH RED CROSS	0%	3%	27%	47%	23%	**70%**
MACMILLAN	1%	1%	30%	46%	22%	**68%**
NUS	0%	4%	28%	49%	19%	**68%**
NSPCC	2%	4%	28%	46%	20%	**66%**
UNICEF	1%	4%	30%	46%	19%	**65%**
OXFAM	2%	6%	27%	52%	13%	**65%**
SPORTS RELIEF	2%	4%	31%	44%	19%	**63%**
MOVEMBER	2%	5%	36%	37%	20%	**57%**
AMNESTY INTERNATIONAL	1%	6%	46%	33%	14%	**47%**
GREENPEACE	2%	7%	44%	38%	9%	**47%**
THE PRINCE'S TRUST	0%	3%	51%	36%	10%	**46%**
TALK TO FRANK	0%	5%	55%	32%	8%	**40%**
YOUNGMINDS UK	1%	2%	62%	24%	11%	**35%**
NIGHTLINE	1%	6%	61%	24%	8%	**32%**
ACTIONAID / BOLLOCKS TO POVERTY	0%	3%	67%	23%	7%	**30%**

Where overall totals are same, higher 'love' percentage determines position. Only top 20 shown. For full placings, see back section.

YOUTH 100

Claire Hutchinson
Director of Marketing, vInspired

yet also this is the first truly digital generation. A generation which has not known a life without the internet. Young people in the UK have seen huge changes, from gay marriage to increasingly diverse communities and the ability to connect with people globally online. What does this mean for brands trying to connect with this audience?

Our research at vInspired has identified a number of key trends which brands can help address. The Youth 100 report reflects some of these drivers. Uncertainty about the future is a real issue. Many young people we work with talk about the feeling that they are going to university and incurring debts without having any certainty that they will get a decent job at the end of it. Others don't think uni is right for them but are struggling to find information on the alternatives. Social anxiety is bubbling under the surface for many. Fuelled by the perfect pics on Instagram, which are hard (if not impossible) to live up to, there's an increasing number of young men and women building online communities for people who 'don't fit'. Maybe this is what's driving the need for security in some areas, looking for what's familiar in an insecure world – from the comfort of Heinz and Hovis in the shopping basket to Boots and Vaseline in beauty.

Yet, conversely, but not incompatibly, this is also a generation which is positive, energised and self-starting. Twenty per cent* want to start their own business. Digital technology makes this more possible than ever. Eight in 10** has campaigned on an issue that matters to them in the last year. And yes, they do care about politics. Just maybe not party politics. Eighty-five per cent registered to vote for the Scottish Referendum. They are favouring authenticity and honesty over hype; good behaviour over tax avoidance. Yes, they want utility and value for money, but they are also looking to brands for relevance, emotional connections and platforms for expression. Of course, it's always been the case that young people are the game-changers, the idealists, the most anxious, the bravest. What's different for this generation?

The digital connectivity which amplifies everything.

So, how to navigate this new world well? It's about more than being good at social media. That's now a prerequisite. It's about being good more generally. Behave well, inspire creativity, provide the platform for young people to express themselves and connect with others (and that doesn't just mean other young people), and what I am learning is that they'll build the future with you.

** Beta Generation, vInspired and You Gov, January 2013*
*** Swing the Vote, vInspired and One Poll, May 2014*

EDUCATION sponsored by smrs

The higher education market in the UK has been in an almost constant state of flux over the last decade.

Ever-changing government policy has contributed to this situation and there are now a greater number and variety of providers (public, private and specialist) along with some sophisticated methods of course delivery. We have a generation of undergraduate students that have very high expectations around the type of education they should receive for their tuition fees. This, coupled with the increasing number of channels through which universities can communicate with potential students, makes for very interesting times for a university and the development of its brand.

Universities are faced by a new market dynamic, one in which the potential student holds all the cards. In this situation, their brand is increasingly important. The big challenge is for universities to differentiate themselves in a market in which the main focus of university identity has historically been built around some common characteristics: academic excellence, student experience, graduate employability, age, location and size.

I'm delighted that the Voxburner Youth 100 includes Education as a category for the first time in 2014. It is a recognition of this increasingly competitive marketplace and the complexity of choices that potential students have when deciding where to, and whether to, continue their education.

Rankings of various types have been playing a key role in the Higher Education sector for a number of years and students from the UK and overseas use some long established league tables to help advise their choices around both course and institution.

The challenge Voxburner face when including universities in the Youth 100 is around the right methodology. This category shortlist was created based on the results of the National Student Survey

EDUCATION TOP BRANDS

	OVERALL
OPEN UNIVERSITY	31%
UNIVERSITY COLLEGE LONDON	17%
LOUGHBOROUGH UNIVERSITY	9%
UNIVERSITY OF DURHAM	7%
UNIVERSITY OF NOTTINGHAM	5%
CARDIFF UNIVERSITY	4%
UNIVERSITY OF READING	3%
UNIVERSITY OF SHEFFIELD	3%
UNIVERSITY OF EXETER	2%
UNIVERSITY OF YORK	2%
UNIVERSITY OF KENT	2%
UNIVERSITY OF BRISTOL	2%
UNIVERSITY OF SOUTHAMPTON	2%
UNIVERSITY OF SWANSEA	2%
UNIVERSITY OF ROYAL HOLLOWAY	2%
UNIVERSITY OF EAST ANGLIA	2%
UNIVERSITY OF LEICESTER	2%
UNIVERSITY OF LANCASTER	2%
UNIVERSITY OF HULL	1%
QUEEN'S UNIVERSITY BELFAST	0%

Dan Benyon
Head of Education, SMRS

and then through including the top 20 largest institutions in terms of student numbers. Unlike the other categories, the young people polled were then only asked one question – 'Thinking of these universities as "brands", which do you think has the strongest identity?'
We must therefore be very careful to avoid trying to draw too many conclusions on the basis of this year's results.

The stand out institution is The Open University and that is testament to the ongoing reputation of the OU as a very well known brand in the UK. That recognition has been achieved over many years and is due in no small part to outstanding course provision coupled with marketing activity of a type and scale that most universities can only admire and not hope to replicate.

I will be interested to watch this category develop further over the coming years and to consider ways in which the sector can help Voxburner establish the Youth 100 Education category as a real indicator of the progress universities are making in terms of differentiation and the development of their brand.

FASHION

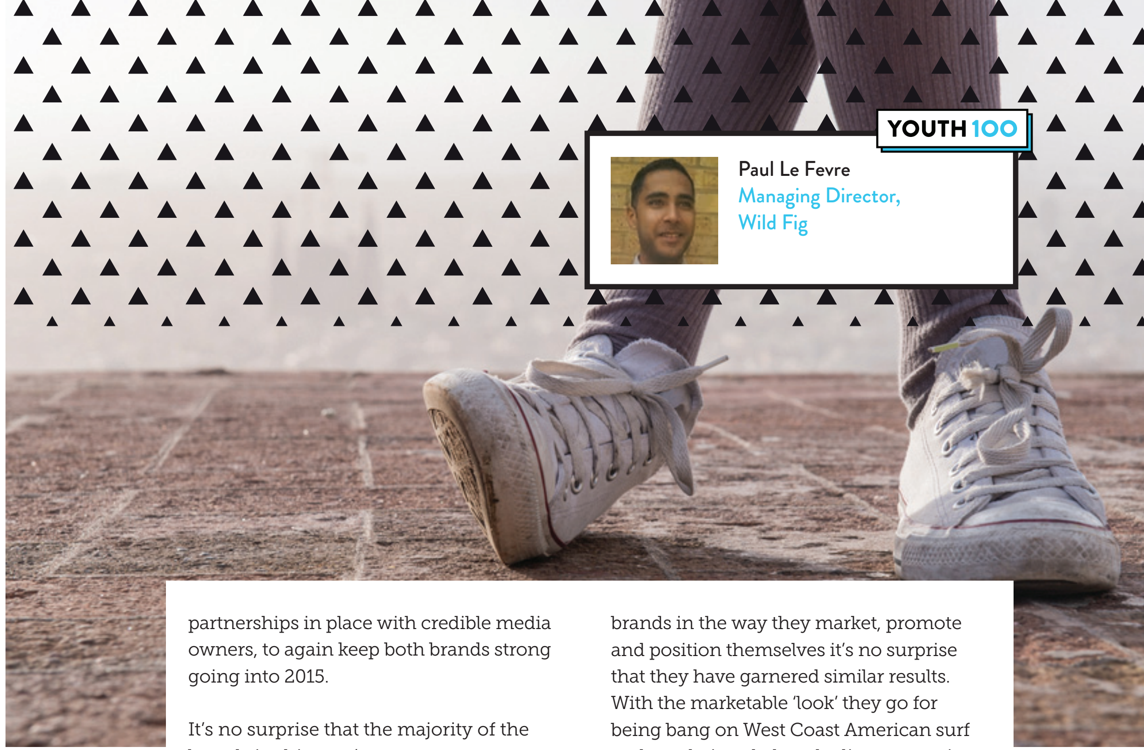
Once again Converse and Vans keep their position as the top brands in the category. This for me doesn't come as a surprise due to their marketing attitude towards below-the-line activity and staying true to their brand ethos and heritage.

As mentioned in last year's write up, both brands have linked themselves well with another core youth passion point, music, and with America being a dominant force in UK music at present it's no surprise that these two brands use American imagery, sports and ambassadors in their marketing materials, upping their cool factor amongst the same audience that consume popular music. I expect this year's activations 'The House of Vans' and 'CONS project' of which have deep-seated, multi-channel partnerships in place with credible media owners, to again keep both brands strong going into 2015.

FASHION TOP BRANDS

	HATE	DISLIKE	NO FEELING	LIKE	LOVE	OVERALL
CONVERSE	0%	5%	21%	40%	34%	**74%**
VANS	1%	9%	25%	48%	17%	**65%**
LEVI'S	1%	7%	41%	41%	10%	**51%**
ADIDAS	1%	17%	36%	30%	16%	**46%**
NIKE	6%	21%	29%	34%	10%	**44%**
DIESEL	4%	14%	41%	33%	8%	**41%**
CATH KIDSTON	2%	12%	46%	27%	13%	**40%**
DR MARTENS	3%	19%	41%	23%	14%	**37%**
ALL SAINTS	1%	13%	49%	26%	11%	**37%**
ABERCROMBIE & FITCH	15%	22%	28%	24%	11%	**35%**
CALVIN KLEIN	2%	17%	46%	30%	5%	**35%**
JACK WILLS	3%	18%	46%	24%	9%	**33%**
TOMS	2%	12%	55%	24%	7%	**31%**
HOLLISTER	10%	33%	27%	23%	7%	**30%**
TOMMY HILFIGER	2%	18%	51%	23%	6%	**29%**
SUPERDRY	7%	32%	32%	24%	5%	**29%**
PULLANDBEAR	3%	8%	66%	17%	6%	**23%**
NEW BALANCE	1%	8%	70%	15%	6%	**21%**
VOLCOM	0%	7%	82%	7%	4%	**11%**
STUSSY	2%	8%	80%	7%	3%	**10%**

Where overall totals are same, higher 'love' percentage determines position. Only top 20 shown. For full placings, see back section.



YOUTH 100

Paul Le Fevre
Managing Director,
Wild Fig

It's no surprise that the majority of the brands in this year's category are so obviously US brands, rubber-stamping the theory that their culture is dominating UK style at the moment. It's not easy for fashion brands to stay at the top of their game, especially amongst an audience always looking for alternatives. so for this both Vans and Converse should be commended.

adidas and Nike's position comes as a surprise to me as they have both had extremely successful years. Maybe the World Cup took an internal preference but I still would have expected a tournament of its size to generate more positive sentiment towards both brands. With Nike's animated stories and Winner Stays tournament to adidas' Brazuca social media success and realtime advertising, I expected both brands to be much higher on this list.

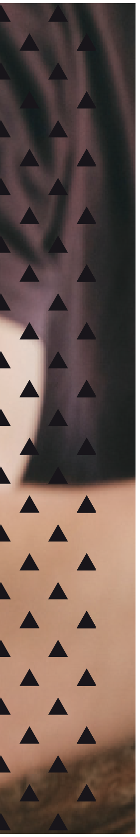
Two results worth mentioning more from the diverse range of boxes being ticked (from hate to like) are Abercrombie & Fitch and Hollister. Them being such similar brands in the way they market, promote and position themselves it's no surprise that they have garnered similar results. With the marketable 'look' they go for being bang on West Coast American surf and no obvious below the line messaging or marketing away from that means that they only appeal to a specific youth demographic – like Marmite you either love them or hate them.

In general fashion 'labels' have drifted further down the overall list which can only be down to one thing: the rise of the retailer. With so many retailers now producing their own brands which are great in value, production and easily accessible (and returnable through digital) young people are using this to their advantage to get the right look rather than the right label.

New entries for brands such as New Balance (running), Volcom (American streetwear) and Cath Kidston (floral prints) shows that trends dictate the fashion label market and if you're in the right place at the right time, you will bear results. A learning for brands to take from this is stay true to your message, keep plugging youth channels and you will have your time.

FAST FOOD & RESTAURANTS

Over the last few years there has been a generational shift in food awareness, a move that the New York Times recently referred to as a ‘gastronomic youthquake’.



Mark Wingett
Editor,
M&C Report

Food is the new rock’n’roll and chefs are the new rock stars. As food consultant Mike Palmer has put it: “People collect tastes (and dishes) as they once collected rare 12 inch tracks, and those food choices are chronicled immediately using phones and uploaded to social networking sites, often before a bite has been taken”.

The emergence of so many eating-out brands entering this year’s Youth 100 highlights not only the resurgence of the sector and renewed optimism in the general economy, but also the sheer breadth of concepts and cuisines currently on offer and being explored. The UK restaurant landscape is undergoing a period of significant change, with a renaissance of pubs, strong emergence of new fast food operations, and a plethora of street food markets nationwide. These concepts are enabling consumers to enjoy premium food in an informal setting. There is also a growing demand from consumers to have ‘what they want, when they want it’ helping to drive the informal casual dining experience.

According to consultancy firm Allegra Foodservice, premium-ised informality, from street food to fine dining is now widespread across the restaurant sector, and this new era is being driven by food pleasure-seekers.

Though the recession has eased, there has also been a strong value legacy, with consumers expecting value delivered across all occasions from every channel. Discounting is still very prevalent among branded restaurants, with 46% of consumers claiming to use discount vouchers more often in the last 12 months. It can be said that there has been a heavy cloak of value sitting on consumers’ shoulders. The new era for the restaurant market is identifying that consumers are becoming more interested in food, more willing to seek indulgence and shrug off that heavy cloak of value – in colloquial terms, the ‘sod-it’ factor.

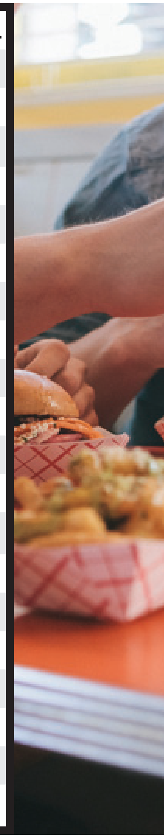
The consumers most active in the restaurant sector are the younger demographic, aged 18-24. However, the younger generation has higher expectations. They won’t take seriously an organisation that is unable to do the basics right, and these expectations are rising all the time. Brand consistencies have become more important judging from this year’s list, with a number of established brands making their debut.

While the top five in this year’s will surprise no one, all are relatively low-cost purchases and in the respect of Nando’s, Subway and Domino’s, masters of building loyal customer bases. The surprises are to be found outside the top five, with a number of more established brands, which are squarely aimed at the family-dining market, with such names as Frankie & Benny’s, Bella Italia, Prezzo and Chiquito being included. Although young adults are not necessarily penny-pinchers, but because they generally have limited disposable income, they want to feel that what they buy is really worth the price. All these established brands place a strong focus on value offers and meal deals.

Although fast food is again represented in this year’s list, the majority of the new entrants come from the casual dining sectors, which although slow to fully grasp the world of social media is now fully engaged with the medium in publicising offers and their grow day parts that are increasingly moving away from the traditional lunch and dinner time slots.

FAST FOOD & RESTAURANTS TOP BRANDS

	HATE	DISLIKE	NO FEELING	LIKE	LOVE	OVERALL
DOMINO'S	1%	7%	11%	48%	33%	**81%**
PIZZA EXPRESS	1%	6%	15%	54%	24%	**78%**
SUBWAY	2%	9%	13%	51%	25%	**76%**
NANDO'S	2%	9%	15%	39%	35%	**74%**
GREGGS	1%	4%	23%	47%	25%	**72%**
FRANKIE & BENNY'S	1%	8%	19%	50%	22%	**72%**
PIZZA HUT	2%	13%	14%	47%	24%	**71%**
MCDONALD'S	5%	14%	14%	48%	19%	**67%**
MILLIE'S COOKIES	1%	3%	31%	37%	28%	**65%**
BELLA ITALIA	1%	6%	30%	41%	22%	**63%**
TGI FRIDAYS	2%	5%	35%	30%	28%	**58%**
BURGER KING	8%	13%	21%	37%	21%	**58%**
KFC	8%	22%	13%	34%	23%	**57%**
PREZZO	1%	6%	37%	43%	13%	**56%**
JAMIE'S ITALIAN	2%	6%	45%	34%	13%	**47%**
PAPA JOHN'S	1%	7%	45%	36%	11%	**47%**
ZIZZI	2%	5%	48%	32%	13%	**45%**
HANDMADE BURGER CO	1%	6%	49%	31%	13%	**44%**
THE SLUG AND LETTUCE	1%	7%	48%	34%	10%	**44%**
CAFE ROUGE	1%	6%	51%	32%	10%	**42%**



Where overall totals are same, higher ‘love’ percentage determines position. Only top 20 shown. For full placings, see back section.

GRADUATE EMPLOYERS

Polls of this sort are always interesting to see the power brands have over 18-24 year-old decision making process – especially when it comes to something as important as your career.

Usually you see brands that 18 to 24 year-olds come into contact with daily such as gadgets, food, drink, entertainment etc. This survey has produced some interesting results in response to their interpretation of "appealing". As a youth marketer understanding this is key.

A strong, respected brand that connects with youth not only sells more products but can attract potential employees. Branding is therefore an extremely potent and persuasive force which is why companies spend billions on creating the right perceptions among youths and become "appealing".

My next question to this audience would be "Why are these companies appealing?" Perception and reality can be very different and graduates can be under the illusion a company is something it's not so it would be very interesting to know what that hook is...and then survey them after three months working there to see if the hype is what it's made out to be.

The danger for graduates in a super competitive jobs market is to lessen your chances of employment by just following the herd. You not only need to meet the qualifications and skills these super-employers demand but also go the extra mile to get noticed by employers such as Google and the BBC. Are you the one? I encourage graduates to go for the dream employers if that's their goal.

They can then earn bragging rights with friends, have a CV stamped with a recognised brand and get their career off to a good start. From experience, I also advise students and graduates to be prepared if it doesn't work out and to have to make a plan B.

Graduates should do research of the entire jobs market by taking a step back from the obvious recruiters and the hype surrounding others. Lift the lid and you'd be amazed by what's on offer.

GRADUATE EMPLOYERS TOP BRANDS

	OVERALL
GOOGLE	32%
BBC	18%
JOHN LEWIS PARTNERSHIP	9%
NHS	8%
GLAXOSMITHKLINE	8%
JAGUAR LAND ROVER	5%
GOLDMAN SACHS	4%
TEACH FIRST	4%
CIVIL SERVICE	3%
BP	2%
KPMG	1%
ALDI	1%
EY	1%
HSBC	1%
BARCLAYS	1%
UNILEVER	1%
TESCO	1%
ACCENTURE	0%
DELOITTE	0%
IBM	0%

YOUTH 100

Dan Hawes
Co-founder,
Graduate Recruitment Bureau

GROCERY

It seems that nostalgia still reigns supreme. When it comes to groceries, it appears 18-24 year -old's preferences lie in old school baked goods.

Heinz is, as last year, still firmly on their radar as number one food brand. This could be (though I'd be surprised by the looks of them) due to their recently released new product range, which includes Tuscan, fajita and veg chilli beans.

What it's more likely to be is young people's approach to weekly shops, i.e. inexperienced and unsure of what they actually like, they tend to purchase what they're used to seeing in everyone else's cupboards, especially mum's.

Home comforts are what young people are going for, as aside from the baked goods, which accumulate the top five, PG Tips (a new entry) and Persil also feature within the top ten. What the majority of the top 10 brands have in common is that they're essentials: tea, bread, cereal and detergent, which shows how unadventurous these youngsters can be and perhaps are less creative than we once thought.

Coming in around the middle are the likes of Lurpak, aahBisto! and McCain. These figures show that although this group don't like them as much as the aforementioned baked goods, they're still consciously thinking about them. Lurpak have introduced a 'cook's range,' but will 18-24 year-olds be interested in this? Probably not.

Brands that are failing include Surf, Lloyd Grosman and Sharwoods but it's not the fact that young people don't like them, it's that they have 'no feeling' towards them, which to me is actually worse. All new entrees, this lot are clearly doing nothing to appeal to the young consumer.

What's also interesting to note is that none of the brands on the list are healthy. With next year set to be the year of the vegan this is somewhat surprising.

Overall, these brand's marketing campaigns don't directly correlate with the results, which means it's more about the age group's attitudes towards the product available. It's evident that what these kids want is convenience, low prices and anything that will add a little oomph to their otherwise bland bolognese. They're easily pleased and happy to purchase what they're used to and what's readily available in all types of stores whether big, small or simply the one closest to them.

> They tend to purchase what they're used to seeing in everyone else's cupboards, especially mum's

YOUTH 100

Lara Piras
Trends Analyst and Writer, Freelance

GROCERY TOP BRANDS

	HATE	DISLIKE	NO FEELING	LIKE	LOVE	OVERALL
HEINZ	0%	4%	15%	58%	23%	**81%**
MR KIPLING	1%	5%	22%	52%	20%	**72%**
KINGSMILL	1%	3%	25%	57%	14%	**71%**
WARBURTONS	1%	3%	28%	51%	17%	**68%**
PG TIPS	3%	8%	22%	45%	22%	**67%**
HOVIS	1%	5%	27%	53%	14%	**67%**
COCO POPS	1%	10%	25%	44%	20%	**64%**
PERSIL	0%	2%	36%	57%	5%	**62%**
CATHEDRAL CITY	1%	6%	33%	39%	21%	**60%**
DOLMIO	1%	5%	36%	42%	16%	**58%**
WALLS	1%	7%	35%	41%	16%	**57%**
LURPAK	1%	9%	34%	42%	14%	**56%**
UNCLE BENS	1%	10%	33%	49%	7%	**56%**
TETLEY	1%	11%	33%	37%	18%	**55%**
AAH! BISTO	3%	7%	37%	39%	14%	**53%**
MCCAIN	0%	5%	42%	41%	12%	**53%**
COMFORT	1%	3%	44%	37%	15%	**52%**
BIRDS EYE	2%	9%	39%	42%	8%	**50%**
SPECIAL K	3%	9%	38%	43%	7%	**50%**
OXO	0%	4%	52%	34%	10%	**44%**

Where overall totals are same, higher 'love' percentage determines position. Only top 20 shown. For full placings, see back section.

HAIRCARE

Glancing at this category, you could be forgiven for thinking that young people don't care about their hair; only one haircare brand, Herbal Essences, made it into the top 100.

In fact, almost a third of respondents reported having 'no feelings' at all towards the majority of the top ten brands in this category, with eight out of the top ten clocking up a 'no feelings' sentiment of 30 per cent cent or higher.

Does this mean this market is wide open or that brands are failing to connect with the youth market at all? What's more likely is this list is heavily influenced by how young people shop for haircare products and where. Looking at other names in the top 100 overall it's simple to surmise young shoppers are purchasing haircare in stores like Boots and Superdrug as well as in supermarkets, which is reflected in the comparatively mainstream names in the haircare favourites list.

With only Herbal Essences appearing to have a relatively strong fan base, brand loyalty doesn't seem to be firmly established in this field. Young people are influenced by price point and can be lured with point of sale discounts but that doesn't mean no-frills haircare is winning fans. Famously no-frills anti-dandruff shampoo Head and Shoulders had the strongest negative sentiment of the brands featured, with a combined dislike/hate score of 19 per cent. Aside from selling a product that is most definitely portrayed as more functional than fun, Head and Shoulders has run with the same type of marketing with adverts that don't particularly target the youth group for many years.

Another brand that mustered similar levels of disapproval was Pantene, who is in many ways still seen as the purveyor of 'those' science ads. They clocked up a combined positive sentiment score of 46% but nearly one in five identified with having some negative feelings associated with the brand. Recent beauty trends among this age group show that they don't like being marketed to with jargon. Though the more recent #ShineStrong campaign attempted to empower women – it was largely pitched to a slightly older demographic. It's also interesting to note that Pantene only launched a UK Twitter account in July of this year (https://twitter.com/PanteneUK), which has so far failed to win many followers.

It's definitely not the case that haircare brands are not attempting youth marketing. V05 in particular has made efforts to target young people directly with its styling product range, using a Hollyoaks sponsorship spot to launch

YOUTH 100

Fay Nyberg
Writer,
Freelance

HAIRCARE TOP BRANDS

	HATE	DISLIKE	NO FEELING	LIKE	LOVE	OVERALL
HERBAL ESSENCES	2%	3%	20%	53%	22%	**75%**
TRESEMME	2%	8%	33%	37%	20%	**57%**
HEAD AND SHOULDERS	4%	15%	25%	44%	12%	**56%**
L'OREAL	1%	9%	35%	47%	8%	**55%**
PANTENE	1%	12%	33%	46%	8%	**54%**
SCHWARZKOPF	0%	7%	40%	43%	10%	**53%**
AUSSIE	1%	6%	41%	27%	25%	**52%**
NICE 'N EASY	0%	9%	54%	30%	7%	**37%**
V05	2%	8%	53%	30%	7%	**37%**
TONI & GUY	1%	10%	53%	23%	13%	**36%**
WELLA	2%	6%	59%	30%	3%	**33%**
REMINGTON	2%	7%	58%	30%	3%	**33%**
LEE STAFFORD	1%	11%	59%	20%	9%	**29%**
TGEL	2%	8%	77%	11%	2%	**13%**

Where overall totals are same, higher 'love' percentage determines position. Only top 20 shown. For full placings, see back section.

how-tos and guides that tap into the growing consumption of do-it-yourself beauty content and advice that's launched powerful blogging careers and peppers platforms like YouTube and Pinterest. VO5 also markets to males far more than other names in this category, so it's a little surprising they didn't come a little higher in the list.

If we look at Herbal Essences to see what they're getting right, we see an approachable brand at an affordable price point, occasionally promoted by the face of an ex-X Factor presenter. The brand has recently launched its own paraben and colourant-free range. We know from experience that 16-24s like brands that stand for something and this will certainly help to differentiate Herbal Essences, who have launched a #GetNaked Twitter campaign to coincide. People are asked to take selfies with natural unstyled hair and post using the hashtag. This should resonate with those young women who have been asking for more realistic advertising and it will be interesting to see whether the brand climbs the list.

HOME & STATIONERY

A measly three brands in the Home and Stationery category made it into the Youth 100 (IKEA, WHSmith and Wilkinson); a paltry number which indicates a fairly ambivalent attitude by young people towards products in this category.

For many young people it's still too soon to be thinking deeply about home products, and the use of traditional stationery by young people is on the decline. Stationery products such as newspapers, magazines, greetings-cards, pens, and paper are fast approaching obsolescence. The digital revolution has resulted in a dramatic shift away from pen and paper and towards digital communication; 15 years ago it was uncommon to see a laptop being used in a university lecture, now digital devices are the method of choice for note-taking during class. 18-24s are consuming a high proportion of content online, superseding content that would have previously been read in a book, magazine or newspaper. Likewise, young people are now far more likely to send a digital message on a special occasion rather than a paper greetings-card. Stationery products, as a result of the digital revolution, are less relevant to students than they were in days gone by.

Ikea was the trailblazer in the home and stationery category, which is highly attributable to their attractive product mix. Their products are regularly-updated, stylish pieces, which are sold at a low enough price point for the youth market to access. IKEA is the go-to retailer for decorating a student room. Interestingly IKEA still maintains a strong presence in traditional marketing channels; they remain very active in traditional print marketing and TV advertising, despite most young people turning to digital channels now to consume content. Ikea has however ramped up their digital presence in recent years, and their popularity has been bolstered by clever utilisation of visual social networks such as Instagram and Pinterest.

WHSmith ranks second highest in this category, despite higher prices than some of their competitors. Their availability, especially at train stations, makes them an easily recognisable and convenient brand for last-minute purchases.
Wilkinson, a new entry for 2014, is a popular choice due to their very competitive price point. Whilst not the flashiest of brands, this result proves how much young people value price over prestige in regards to home and stationery products. Wilkinson caters to a variety of student needs, and their marketing is very aptly targeted towards the youth market around the start of term. Young people also love a seamless online shopping experience, and Wilko's delivers the goods in this department.

> Whilst stationery products have their work cut out for them in the future, home products will continue to be demanded.

YOUTH 100

Natalie Waterworth
Co-founder,
Talented Heads

Argos failed to make it into the top 100 this year, despite recent attempts to ramp up their digital presence. As far as online retailing goes, young people are adept at shopping around for the best price, and Argos loses out when their prices aren't as competitive as those on eBay and Amazon.

Various high street stationery brands such as Paperchase, Rymans and Staples, didn't make it into the top 100, despite their strong presence on the high street. Cheaper substitute products are available online, notably on the likes of eBay and Amazon, and to remain competitive in the youth stakes these brands will need to bolster their online competitiveness.

Whilst stationery products have their work cut out for them in the future, home products will continue to be demanded due to sheer necessity. We will likely see some new entrants into the home category in years to come, possibly from other affordable Scandinavian home-ware brands such as Tiger.

HOME & STATIONERY TOP 20

	HATE	DISLIKE	NO FEELING	LIKE	LOVE	OVERALL
IKEA	1%	2%	17%	46%	34%	**80%**
WH SMITH	1%	3%	19%	55%	22%	**77%**
WILKINSON	1%	4%	24%	47%	24%	**71%**
ARGOS	0%	4%	30%	61%	5%	**66%**
PAPERCHASE	1%	4%	32%	45%	18%	**63%**
BIC	1%	3%	36%	46%	14%	**60%**
RYMANS	1%	6%	45%	37%	11%	**48%**
STAPLES	1%	4%	47%	41%	7%	**48%**
MOONPIG.COM	2%	11%	53%	31%	3%	**34%**
STAEDTLER	1%	5%	62%	27%	5%	**32%**
FUNKEYPIGEON.COM	2%	13%	55%	24%	6%	**30%**
FILOFAX	1%	6%	71%	16%	6%	**22%**
ZOOM DIRECT	1%	3%	81%	12%	3%	**15%**
3M	2%	4%	82%	10%	2%	**12%**

Where overall totals are same, higher 'love' percentage determines position. Only top 20 shown. For full placings, see back section.

INTERNET

From my experience in the agency world, in both PR and advertising, metrics were always a vital ingredient with both the agency wanting to benchmark whether they were doing a good job and the brand wanting to make sure of strong ROI.

This study helps give a real barometer of a brand's performance. And what's great about this in particular, is that it goes even deeper than just whether you like or don't like a brand, by providing five different rankings to base the respondent's answers on. This means that the data is more accurate and therefore more useful and actionable as a result.

It comes as no surprise that YouTube keeps their place at the top of the tree within the category with an incredible outpouring of love by 64% of respondents and 0% hate. However, they do find themselves now down in 2nd place in the overall ranking. They are only one of seven companies in the top 20 in the category with 0% hate. The others being Wikipedia, Spotify, Dropbox, vouchercloud, About.me and State.com. YouTube more than ever is creating celebrities based purely on their regularly entertaining yet informative videos, while increasing their subscriber numbers exponentially.

You have to look at acquisitions like Twitch (a leading video platform for gamers) bought by Amazon to realise that YouTube may have even just scratched the surface of their potential, even now going in to 2015 and perhaps reclaiming their crown at the top of the overall ranking tree.

The Internet moves at such a pace now that we are regularly seeing new entrants join crowded marketplaces and set themselves out from their competitors, and this is shown with 11 out of the 20 entries joining our research for the first time in 2013. Those include Adblock, and Dropbox which both tells us important things about where the market is heading.

Adblock: users are becoming increasingly more web savvy and are seeking ways to craft and curate their personalised web experience to suit them, Adblock helps them do that through hiding ads.

Dropbox: we are moving to an era where cloud computing is for better or worse, holding most of our online lives up there, in the big grey Internet clouds that we can't see or touch. And that's kinda scary. What with the high profile hacks of celebrity content being found on iCloud, it has thrust cloud file storage into the limelight and made people check what level of security they have themselves with their own private content.

What surprised me most was the most disliked brands include Twitter, Tumblr (sliding down from 202 to 221), iTunes and LinkedIn (down from 234 to 362). All of which I think can have an important part to play in personal and professional development online. LinkedIn is playing an increasingly important role in recruitment. Twitter is interesting because it has fallen heavily from 60 in the top 500 in 2013 down to 155 this year. It seems to be struggling a little with where it positions itself, and is losing the youth audience to Snapchat, Instagram and WhatsApp

YOUTH 100
Michael Litman
Founder and CEO,
Burst & Brandsonvine

.The most loved come as less of a surprise with YouTube, Google, Wikipedia, Facebook and Skype rounding out the top five, with the main difference being Wikipedia (up one) and Facebook (down one) swapping places, suggesting that Facebook's dominance in the social space may be waning.

I can't wait to see next year's results already, to see just how much things have changed in another 12 months.

INTERNET TOP BRANDS

	HATE	DISLIKE	NO FEELING	LIKE	LOVE	OVERALL
YOUTUBE	0%	1%	6%	29%	64%	**93%**
GOOGLE	1%	2%	4%	33%	60%	**93%**
WIKIPEDIA	0%	2%	9%	49%	40%	**90%**
FACEBOOK	3%	4%	11%	50%	32%	**82%**
SKYPE	1%	7%	11%	52%	29%	**81%**
SPOTIFY	0%	3%	25%	46%	26%	**72%**
ITUNES	4%	12%	13%	45%	26%	**71%**
TWITTER	5%	16%	21%	31%	27%	**58%**
GUMTREE	1%	6%	36%	39%	18%	**57%**
DROPBOX	0%	7%	38%	35%	20%	**55%**
ADBLOCK	1%	4%	41%	24%	30%	**54%**
TUMBLR	5%	12%	35%	29%	19%	**48%**
GROUPON	2%	7%	44%	34%	13%	**47%**
WOWCHER	3%	14%	47%	30%	6%	**36%**
VOUCHERCLOUD	0%	6%	59%	26%	9%	**35%**
LINKEDIN	2%	14%	52%	27%	5%	**32%**
8 TRACKS	1%	3%	76%	13%	7%	**20%**
STATE.COM	0%	3%	88%	7%	2%	**9%**
ABOUT.ME	0%	12%	80%	6%	2%	**9%**
BING	20%	36%	36%	7%	1%	**8%**

Where overall totals are same, higher 'love' percentage determines position. Only top 20 shown. For full placings, see back section.

LIFESTYLE & ENTERTAINMENT

sponsored by RADIATOR

Safe, secure and spending. As a reflection of youth behaviour choices, this list will make Government ministers rub their hands with glee. What an obliging and well behaved generation we have on our hands..how well they have done!

Yup, this list confirms that the recession is well and truly over. We couldn't be further from the distant rumblings of youth discontent only a few years ago. It's all in the past. These brand choices confirm that this generation are consuming big entertainment platforms and splashing the cash that's needed.

What an insight to see the top 20 favoured brands reflecting the joys of staying in, healthy lifestyles and mass entertainment, comfortable in the warm embrace of mega worlds like Warner, Odeon and Disney.

This list truly rewards brands that deliver precision targeted marketing. Group discounts, special offers, buy one and refer a friend – the shape of their tickets and experiences are brilliantly tailor-made. But for me, as a consumer who grew up in the 90s raves, dayglo & warehouse parties – this list is a teeny bit alarming.

The shock factor here is quite how un-shocking life's entertainment has become for young consumers. Don't get me wrong - I have spent my career repackaging sport for young people to make it a positive choice and not a boring school necessity, so seeing Fitness First, David Lloyd and Go Ape! in the top 20 is by any standards fantastic news.

And I'm also interested to see that Zoopla and RightMove are obviously helping this generation make informed independent living choices. But for me, the really interesting bit is how much longer will these choices continue to satisfy? Will the next generation be seeking out new activity choices and how will brand owners need to evolve?

Start-up gaming brands continue to break down transatlantic borders with online global playing developments and we are seeing a growth from students in seeking out ever more adventurous overseas activities. Maybe these are green shoots reflecting a simmering appetite for adventure and departure.

If there is one thing we can be sure of, young consumers never stand still. There is no status quo and there is always a reaction.

YOUTH 100

Gaby Jesson
Owner,
Radiator PR

LIFESTYLE & ENTERTAINMENT TOP BRANDS

	HATE	DISLIKE	NO FEELING	LIKE	LOVE	OVERALL
WARNER BROS	0%	3%	15%	43%	39%	**82%**
NETFLIX	0%	4%	17%	36%	43%	**79%**
DISNEY	2%	5%	15%	33%	45%	**78%**
ODEON	0%	6%	19%	52%	23%	**75%**
WETHERSPOON	1%	3%	22%	44%	30%	**74%**
CINEWORLD	0%	4%	29%	50%	17%	**67%**
ALTON TOWERS	1%	8%	26%	35%	30%	**65%**
TICKETMASTER	2%	3%	30%	48%	17%	**65%**
EA GAMES	2%	5%	30%	41%	22%	**63%**
THORPE PARK	2%	6%	32%	31%	29%	**60%**
VUE	1%	3%	36%	49%	11%	**60%**
AMAZON PRIME INSTANT VIDEO	3%	10%	38%	38%	11%	**49%**
GO APE!	1%	6%	50%	30%	13%	**43%**
MINISTRY OF SOUND	3%	12%	43%	33%	9%	**42%**
RIGHTMOVE	1%	4%	56%	32%	7%	**39%**
FITNESS FIRST	1%	9%	53%	30%	7%	**37%**
ZOOPLA	2%	9%	56%	25%	8%	**33%**
TENPIN	1%	6%	63%	20%	10%	**30%**
WALKABOUT	2%	8%	63%	21%	6%	**27%**
DAVID LLOYD	3%	6%	66%	17%	8%	**25%**

Where overall totals are same, higher 'love' percentage determines position. Only top 20 shown. For full placings, see back section.

LUXURY

Times have changed for the luxury industry. Traditional luxury brands are still earning money in emerging Eastern European, Asian and LATAM markets where the rise of a mid-class, looking for prestige brands that radiate their freshly earned status.

But it is clear that the glamorous glitter is increasingly losing its golden appeal to Millennials in many Western markets. Most luxury brands in the Youth brand index won't be found in the top 250. And some that were still there in last edition have dropped drastically in this year's ranking.

In the early 2000s, iconic luxury brand logos shouting "I can afford this stuff" were still part of the preppy Millennial lifestyle, but today visibly showing off is totally not done. Being smart and saving money is the new cool for youth. Fashion retailers like Forever 21, H&M and Uniqlo know how to give Millennials the affordable catwalk look without burning money on stores that once thrived off the concept of chest logo billboarding such as Abercrombie & Fitch, American Eagle and Aeropostale, whom are all suffering. Lately A&F decided to remove the well-known logo from most of its clothing in the spring 2015 collection.

Macklemore's hit single "thrift shop" was all about keeping the dollars in your pocket and it's a sign of times that even hip hop artists who used to brag about expensive champagne, Courvoisier cognac and 'bling bling' Mercedes cars have changed their lyrics. Today owning a house is the new bling thing. In studies 3 out of 4 Millennials would state "real estate property is the best indicator of success", whereas less than 10% refers to expensive cars and only 5% to wearing designer fashion.

But let's take a look at the 3 brands that DID make it to the top 250. Number three BMW is obviously supported by a herd of male fans, but still it seems to be the only car brand in the luxury top 20. Surprisingly, the brand has never consciously tried to appeal to the youth market. The German car manufacturer is using its other strong Mini brand within the family to recruit that demographic segment. BMW is a classic example of a brand that is not trying to appear cool and yet succeeds in connecting with Millennials more than any other car brand.

Number two Swarovski has grown from a family-owned cut crystal company to one of the world's leading jewellery retailers. In recent years Swarovski has launched the Lolaandgrace youth-oriented brand with a range of accessibly-priced fashion items. It has a more relaxed and funky free-spirited image if you compare it to the more streamlined Swarovski collection.

The number one luxury brand Chanel has shifted from a high-fashion inaccessible fortress to a more Gen Y and future proof retailer. It positively surprised Millennials by opening a store in London's Covent Garden with a nail bar, beauty vending machine and flower stall. Chanel – and its head designer Karl Lagerfeld – have worked hard to retain or regain its air of exclusivity. It cut the list of distributors, refuses to sell most items (except for beauty products) online, and never holds sales in its stores.
This approach makes the brand scarcer, hard to find and desirable. Chanel also extended its brand appeal to Millennials with the Coco Mademoiselle sub-brand for younger women.

As a last observation, I would like to point at the low scoring luxury watches brands like Omega and Tag Heuer. In this age of mobile technology and self-quantifying wearables like the fuelband or the UP24, luxury watches are literally missing the pulse of the Millennials generation. They better watch out for the Apple watch as a new entrant in this luxury segment.

YOUTH 100

Joeri Van den Bergh
Author,
How Cool Brands Stay Hot

LUXURY TOP BRANDS

	HATE	DISLIKE	NO FEELING	LIKE	LOVE	OVERALL
CHANEL	2%	7%	37%	35%	19%	**54%**
SWAROVSKI	2%	6%	44%	34%	14%	**48%**
BMW	1%	8%	45%	33%	13%	**46%**
RALPH LAUREN	2%	11%	42%	28%	17%	**45%**
GUCCI	4%	10%	43%	24%	19%	**43%**
CHRISTIAN DIOR	1%	12%	44%	30%	13%	**43%**
LOUIS VUITTON	2%	17%	38%	30%	13%	**43%**
HUGO BOSS	2%	10%	46%	30%	12%	**42%**
PRADA	2%	10%	49%	23%	16%	**39%**
YSL	2%	5%	54%	24%	15%	**39%**
MULBERRY	2%	10%	50%	25%	13%	**38%**
ARMANI	4%	19%	43%	28%	6%	**34%**
LACOSTE	4%	19%	44%	28%	5%	**33%**
KURT GEIGER	1%	9%	58%	20%	12%	**32%**
BURBERRY	8%	25%	38%	23%	6%	**29%**
REISS	1%	5%	66%	22%	6%	**28%**
OMEGA	0%	4%	71%	19%	6%	**25%**
TAG HEUER	3%	8%	66%	17%	6%	**23%**
MONT BLANC	2%	7%	72%	13%	6%	**19%**
BANG & OLUFSEN	2%	7%	74%	11%	6%	**17%**

Where overall totals are same, higher 'love' percentage determines position. Only top 20 shown. For full placings, see back section.

MEDIA

Media has felt the impact of technology as much as any other industry over the last five years or so; the implications of which are not hard to see within the top brands list for 2014.

Looking at the media brands list, they instinctively fall into several traditional categories: TV, newspapers, magazines. Yet the impact of technology means that every one of these brands now has a multi-platform offering for its audience. This can range from just an additional website up to a vast mixture of products and platforms (excluding social channels the Guardian currently offers over a dozen different products to access its content). It is this very adoption of different platforms and devices that is vital to the media industry's continued success with the youth market.

The BBC still retains the top spot from last year with some fairly impressive scores, and ITV is a new entrant to the list in third. There is a definite segregation among the media brands, with the top four noticeably clear of the pack; incidentally they are all traditional broadcaster brands. The qualitative work reveals that these brands tend to be associated more with entertainment, particularly their video on demand (VoD) services and might go some way to explain why they score much higher than the other brands. Indeed, VoD services might be what edges the BBC to the top as a few comments rated the iPlayer better than Channel 4's service; a good example of how getting your digital products right is vital for this audience.

It is good to see traditional newsbrands still making the top 10 list. Both the Guardian and Mail's large online and mobile presence will no doubt have contributed to their respective positions.

Additionally, the Guardian has been increasing its video content which has been shown to be favoured by a younger online audience. The qualitative work also highlights that print products are still being read and this should offer encouragement to publishers. Further down the list are brands perhaps associated more with a younger audience, such as Metro and the i.

Buzzfeed is the highest climber in the list, having jumped up nine places to rank as the fifth most popular media brand. Its success may be down to the nature of its content. Last year nearly three quarters of respondents had no feeling towards Buzzfeed; now it is less than half. So opinion, or at least awareness, has increased. This is probably down to the highly sharable nature of its short-form content, perfect for this young and mobile age group.

Despite almost all of the media brands sliding down the overall rankings, their actual 'Like/Love' scores have mostly stayed the same or even increased since last year. This suggests to me that maybe these traditional brands have a firm place in the heart of youth and will carry on performing at these levels for some time, whilst newer brands will come and go. Furthermore, these new brands might not be able to deliver the same levels of trust seen in traditional broadcasters and newsbrands.

Looking to the future, what can be expected for next year's report? I think the BBC will hold onto its top ranking, but will be pushed by the likes of Channel 4 and ITV as their digital and more importantly, mobile offerings improve. Newsbrands certainly have a place within this age group, but they need to find a way to generate stronger loyalty and advocacy. Despite Buzzfeed's impressive traffic growth and large investments, I am not sure it can break into the top four brands just yet.

YOUTH 100

Kevin Stevens
Insight Manager,
Guardian News & Media

MEDIA TOP BRANDS

	HATE	DISLIKE	NO FEELING	LIKE	LOVE	OVERALL
BBC	1%	3%	9%	56%	31%	**87%**
CHANNEL 4	1%	3%	14%	57%	25%	**82%**
ITV	1%	6%	20%	51%	22%	**73%**
E4	0%	5%	25%	44%	26%	**70%**
BUZZFEED	1%	7%	44%	29%	19%	**48%**
MTV	5%	13%	35%	32%	15%	**47%**
THE GUARDIAN	2%	10%	43%	40%	5%	**45%**
COSMOPOLITAN	2%	11%	44%	28%	15%	**43%**
GLAMOUR	2%	10%	51%	28%	9%	**37%**
DAILY MAIL	13%	23%	28%	30%	6%	**36%**
METRO	1%	9%	55%	28%	7%	**35%**
E!	2%	11%	55%	21%	11%	**32%**
THE I PAPER	1%	5%	67%	16%	11%	**27%**
FIVE	2%	9%	62%	21%	6%	**27%**
NME	2%	10%	62%	21%	5%	**26%**
GQ	2%	6%	69%	18%	5%	**23%**
FINANCIAL TIMES	3%	12%	62%	19%	4%	**23%**
THE ECONOMIST	2%	9%	69%	18%	2%	**20%**
FHM	6%	14%	61%	15%	4%	**19%**
VICE	1%	5%	79%	8%	7%	**15%**

Where overall totals are same, higher 'love' percentage determines position. Only top 20 shown. For full placings, see back section.

MOBILE & ISPs

Young people aged 18-24 are key to the mobile market. The mobile is their lifeline, the centre of their world, so what is particularly interesting about the results is the general decline in sentiment in the category as a whole.

Every single mobile brand has dropped down the Top 500 rankings since 2013, and in particular Orange has dropped over 100%, and T-Mobile by 84% (174, and 180 places in the Top 500 rankings). Orange and T-Mobile's fall from grace is probably the fall out of their EE ownership – diluted as brands, there's a clear move away from any substantial marketing activity and neither brand now own anything distinct. It seems the youth have lost the love.

But there is a really positive story in the top 3 ranking mobile brands – SKY (1), O2 (2), and BT (3). Both Sky and O2 and have maintained their top category spots since 2013 by continuing to innovate and engage the 18-24 year old audience.

When it comes to liking and loving a brand, the 18-24 audience are a tough crowd to please. This generation expects services "on demand" and they want choice. The top three mobile brands have clearly got the audience sussed. Sky and O2 have the strongest positive feelings with double figures (16%, and 15% respectively) saying they liked and even loved the brand. O2 have stormed ahead with leading loyalty platform Priority, taking it to new and exciting levels. It's no longer about a functional relationship with a brand, these customers want a real connection, one that is grounded in something that matters to them.

O2 Priority was founded on the simple insight that customers want to feel important, a 'priority'. They work with its brand partners to give customers unique access, experiences and rewards linked to the things they love, customers' passions, such as music, sport, fashion, film, eating out, shopping. Chief executive Ronan Dunne attributes Priority to being one of the main reasons O2 has "the most loyal customers in the sector" - their churn rate is the lowest in the industry with 1%.

This generation expects services "on demand" and they want choice.

Sky have launched Sky Go and Sky Go Extra – providing choice, convenience and access to programmes they love through a medium they naturally consume – a winning formula. BT are also no longer faceless with the youth age group. The provider has been propelled into the 18-24 customer mind set with BT Sport, really owning their customers passion point with the exclusive live UK TV rights to 38 Barclays Premier League matches as well as exclusive or shared rights to the FA Cup, UEFA Europa League, UK TV rights to Moto GP and the Aviva Premiership to name but a few.
What is striking however, is the general ambivalence throughout the category, with at least 50% of all mobile brands' (excluding only Sky) customers saying they disliked, had no feeling, and even hated the brands. It's not looking good for loyal brand advocates with all this negative sentiment.

YOUTH 100

Tamara Gillan
CEO,
Cherry London

Again both Orange and T-Mobile didn't fare well in the love/hate stakes – it looks like EE's Kevin Bacon adverts aren't resonating with the 18-24 audience.
Talk Talk came off worst, with 80% of customers in total feeling ambivalent/disliking/hating the brand. The X Factor sponsorship really has had its heyday!
The most hated mobile brand here is Vodafone. Vodafone no longer speak the language of 18-24 year olds since pulling one of the only things that really engaged this audience – VIP. Now they're seen as corporate and expensive.

Take heed mobile brands, the top 3 have remained in their spots by continually investing in their customers, understanding what they really want and then delivering it beyond just a functional relationship. It will be interesting to see how next year's results compare.

MOBILE & ISPs TOP BRANDS

	HATE	DISLIKE	NO FEELING	LIKE	LOVE	OVERALL
SKY	1%	12%	32%	39%	16%	**55%**
O2	3%	9%	37%	36%	15%	**51%**
BT	2%	15%	33%	41%	9%	**50%**
CARPHONE WAREHOUSE	2%	11%	42%	38%	7%	**45%**
VIRGIN	2%	17%	43%	32%	6%	**38%**
VODAFONE	6%	17%	41%	26%	10%	**36%**
ORANGE	5%	21%	38%	32%	4%	**36%**
EVERYTHING EVERYWHERE (EE)	3%	10%	52%	28%	7%	**35%**
PHONES4U	1%	12%	56%	27%	4%	**31%**
THREE	5%	21%	45%	23%	6%	**29%**
T-MOBILE	2%	20%	50%	22%	6%	**28%**
GIFFGAFF	2%	12%	61%	19%	6%	**25%**
TALKTALK	1%	20%	58%	19%	2%	**21%**

Where overall totals are same, higher 'love' percentage determines position. Only top 20 shown. For full placings, see back section.

MONEY & FINANCE

Despite the fact that money is the essential needed to buy the products, or use many of the services featuring in the Youth 100, financial services hardly figure in young people's favourite brands. In fact only PayPal retains its top 100 position

Young people find PayPal attractive because it makes paying for anything online so quick and straightforward. "PayPal is so easy to transfer and pay - it's just one click and I don't have to find my card," and "It influences me to go back to a website because it's so quick and easy to pay using PayPal".

Financial services by their nature are functional rather than exciting, so it's hardly surprising that young people wouldn't talk as animatedly about their new bank account as they would, say, about their new shoes, or latest phone. What PayPal's continuing pole position in this category demonstrates though, is just how central the internet has become to young people's lives – not just for social media or playing games but also for shopping.

Visa has dropped out of the top 100 but remains number 2 in this category, their high profile continuing this year with their sponsorship of the World Cup. And the reliable Post Office hangs in at number 3.

Despite their troubles the Co-op has jumped from 9 to 4, perhaps the impact of the bad publicity has faded somewhat and young people are remembering their erstwhile reliable reputation, while RBS's poor showing at 22 may have something to do with continuing to have a negative profile in the media.

So what can we learn from young people's attitudes to the brands in this category? Well, for me it reinforces the findings from research we carried out at the FSA, namely that young people want to be seen to be "savvy" with money. They are looking for the good deals, "the student overdraft and interest free was appealing", and convenience, "Mobile apps now are ideal, you can find out where the nearest cash point is if you are in an unfamiliar place" and reliability, "NatWest is pretty good and what I really expect from an account. It's basic but that's all I need".

It's clear too, that young people's choices around financial products are more often influenced by family than other consumer choices they may make: "I've always been with the same bank because that's what my parents advised me to do." Given that most of us are more likely to get divorced than change our bank, a plethora of incentives are aimed at young people: "A free railcard is definitely a big incentive to join a bank or change for a student, I opened a new account with Santander because they were doing that,". What should give us pause for thought though is the continued ignorance among young people regarding financial products – from thinking that the higher the APR the better the deal on a loan to believing that an ISA is an ipod accessory.

With Financial Education a statutory part of the curriculum now, it will be interesting to see whether this results in savvier young consumers of financial services and any shift in their choices of favourite brands.

> PayPal's pole position demonstrates just how central the internet has become to young people's lives.

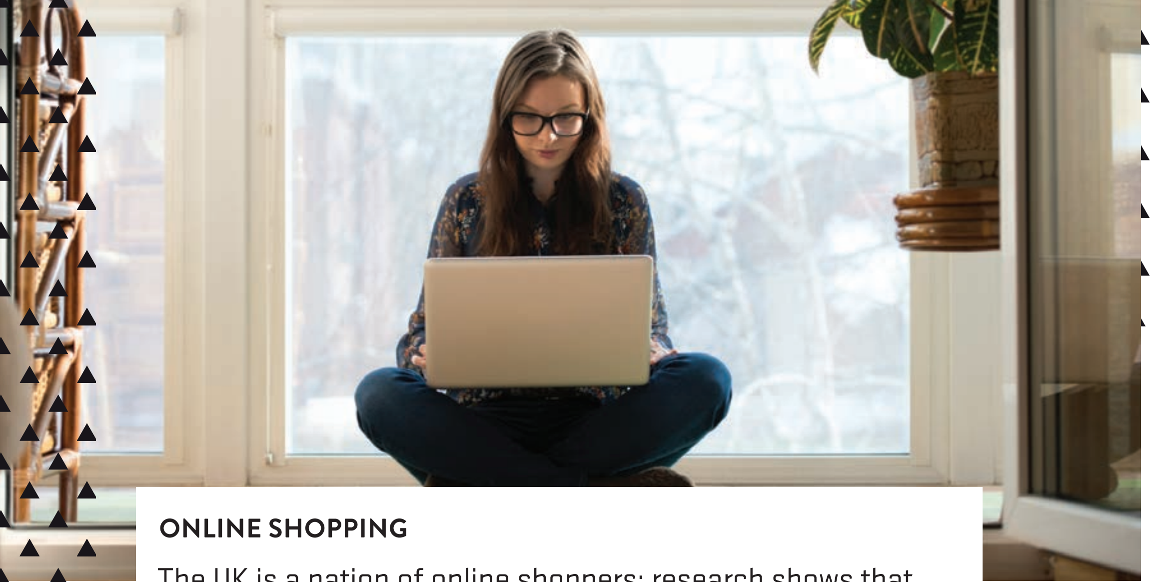
YOUTH 100

Linda Jack
Youth Policy Advisor,
Money Advice Service

MONEY & FINANCE TOP BRANDS

	HATE	DISLIKE	NO FEELING	LIKE	LOVE	OVERALL
PAYPAL	2%	2%	18%	55%	23%	**78%**
VISA	1%	2%	36%	48%	13%	**61%**
POST OFFICE	0%	5%	36%	47%	12%	**59%**
COMPARETHEMARKET.COM	2%	5%	46%	35%	12%	**47%**
THE CO-OPERATIVE	1%	8%	44%	37%	10%	**47%**
MONEYSUPERMARKET	0%	8%	49%	38%	5%	**43%**
GOCOMPARE	6%	12%	44%	29%	9%	**38%**
BARCLAYS	2%	10%	51%	29%	8%	**37%**
SANTANDER	2%	9%	52%	30%	7%	**37%**
LLOYDS TSB	0%	8%	59%	22%	11%	**33%**
HSBC	3%	7%	57%	25%	8%	**33%**
MASTERCARD	1%	4%	63%	29%	3%	**32%**
NATWEST	2%	7%	60%	20%	11%	**31%**
HALIFAX	2%	8%	60%	23%	7%	**30%**
NATIONWIDE	1%	6%	64%	21%	8%	**29%**
CONFUSED.COM	2%	6%	64%	24%	4%	**28%**
AMERICAN EXPRESS	2%	9%	63%	20%	6%	**26%**
COVER 4 STUDENTS	2%	8%	66%	19%	5%	**24%**
ENDSLEIGH	0%	8%	71%	16%	5%	**21%**
VIRGIN MONEY	1%	8%	71%	16%	4%	**20%**

Where overall totals are same, higher 'love' percentage determines position. Only top 20 shown. For full placings, see back section.



ONLINE SHOPPING

The UK is a nation of online shoppers: research shows that 95% of us are now making purchases online, and that we spend significantly more when we do so than most other countries. Young people are key drivers of this.

Not only do they spend hours online each day – primarily on smartphones – they are also generally time-rich and cash poor, a combination that means they're more willing than most to spend time tracking down the best deals.

According to Ofcom, UK consumers are also more likely to trust online retailers, which makes Amazon's place at the top of the category (and the entire list – rising one place from last year to claim the top spot) unsurprising: it's consistently rated as one of the most trusted brands among consumers. This is thanks in part to its straightforward returns system, but also because it encourages reviews from previous buyers, which adds a degree of transparency to the process. Recent negative publicity around working conditions and tax issues seem to have done little to dent this reputation, at least among young consumers.

According to feedback from the focus group, young people value Amazon for its convenience – the fact you can find almost anything you need – and as such it's often their first port of call when searching for items online. This doesn't always translate to sales, however: some young people say they use the site just for price comparison, or to see what's available in a certain category before purchasing elsewhere.

Placing just behind Amazon in the category, Ebay is in many ways similar to the top-spot holder: it allows users to buy and sell and has an enormous range of choice. It could also be seen as the poster child of the current trend for collaborative consumption – illustrated by the rise in popularity of brands like AirBnB – that this demographic is such a key market for.

Fashion retailer ASOS has enormous choice since it carries most of the high street brands, and in placing third it's the pick of the fashion retailers. "ASOS is my favourite for clothes – they have so many brands," says one consumer. "It's so easy to refine my search and put in the price you want to spend. They have really good sales which definitely helps, and you can get a student discount."

Bronwen Morgan
Deputy Editor,
Impact magazine

This need for convenience doesn't go away when young people's thoughts turn to their stomachs, if the presence of Just-Eat and Takeaway.com in the shortlist are anything to go by. Both of these sites allow users to order takeaway food from a selection of local restaurants while (barely) lifting a finger.

Graze's approach of offering freebies to new customers and their friends – often via coupons included in the delivery packaging of online shopping brands and in youth-oriented magazines, but also via social media – taps into the word-of-mouth approach that works so well with this social network-reliant demographic.

It seems convenience, and the potential to secure a bargain, are strong markers of success in the online category for young consumers. But don't expect them to take the first deal they're offered: they've got the time, the patience, and the connections to shop around for the best price.

ONLINE SHOPPING TOP BRANDS

	HATE	DISLIKE	NO FEELING	LIKE	LOVE	OVERALL
AMAZON	0%	2%	4%	42%	52%	**94%**
EBAY	0%	5%	12%	54%	29%	**83%**
ASOS	0%	5%	23%	38%	34%	**72%**
JUST-EAT	1%	5%	27%	48%	19%	**67%**
GRAZE.COM	2%	15%	28%	39%	16%	**55%**
BOOHOO.COM	1%	7%	42%	30%	20%	**50%**
PLAY.COM	4%	9%	44%	32%	11%	**43%**
NOTONTHEHIGHSTREET.COM	0%	6%	53%	27%	14%	**41%**
TAKEAWAY.COM	2%	5%	60%	24%	9%	**33%**
FEELUNIQUE.COM	2%	4%	63%	21%	10%	**31%**
FIREBOX.COM	1%	5%	72%	16%	6%	**22%**
BRANDALLEY.COM	1%	6%	81%	9%	3%	**12%**
ZAZZLE.COM	1%	8%	83%	8%	0%	**8%**

Where overall totals are same, higher 'love' percentage determines position. Only top 20 shown. For full placings, see back section.

RETAIL

It's not surprising to see a "fast fashion" brand like H&M almost grab top spot in retail, with the Swedish company's ongoing focus on fashionable pieces at good prices always chiming with youth. That H&M's "look" is international does it no harm as there's been a shift in tastes away from raw street to something more in the broad mainstream.

Young people are more conservative than many think, which should really be no surprise in an era when politicians are delivering austerity and a promise of plenty more to come. Jobs are hard to come by, never mind any kind of dream career.

That's clear in current youth attitudes to edgier retail brands. It's hard to find respondents who actively dislike H&M, but Urban Outfitters – once the epitome of rebellion – has no problem on that front, with one-fifth of young people saying they hate/dislike it. In large part that's due to the brand's aggressive nature being out of sync with current UK youth character (did those student demos really happen?). And it's pretty pricey, which isn't good in these straitened times. The message needs to change, and maybe it's time to ditch those cushions, duvet sets and electric string lights to focus on refashioning the fashion.

New Look is going from strength to strength on the sales front, probably because it's become pretty good at spotting and riding the right trends. Kimonos were the summer 2014 fashion hit and, at peak, New Look was reportedly selling the item at a rate of 40,000 a week. New Look's 10% student discount, plus a decent 20% off items in its "Festival Wardrobe" hasn't done it any harm, either. All this adds up to a sizeable amount of brand love, and New Look has it in spades with 81% of respondents professing to like and love it.

Going back to that thing about a more conservative youth. Here the data doesn't lie because there in the Top 10 are Boots and Marks & Spencer, two brands that the parents of today's youth – and their parents, of course – continue to hold dear. The reasons for this high regard haven't changed. Youth recognises that M&S remains the place to go for clothing basics that last and so provide solid value-for-money. They expect that those Marks' purchases will feature in the undies drawer long after Primark-labelled knickers have frayed and been consigned to the bin.

Young people do love Primark for being cheap and disposable. Primark is clearly recognised for what it is, and expectations are moderated on a trip to the store which can often result in joining a public scrummage. But Primark is a key, essential brand for Youth 2014.

Finally, a question. Does all this suggest that this latest generation of youth be more like its parents than its parents? In the current climate, that's altogether possible.

YOUTH 100

Steve Mullins
Brand Consultant, brand-e

RETAIL TOP BRANDS

	HATE	DISLIKE	NO FEELING	LIKE	LOVE	OVERALL
BOOTS	0%	1%	15%	46%	38%	**84%**
NEW LOOK	1%	5%	13%	51%	30%	**81%**
H&M	1%	6%	12%	54%	27%	**81%**
THORNTONS	0%	4%	18%	50%	28%	**78%**
SUPERDRUG	0%	2%	21%	49%	28%	**77%**
PRIMARK	2%	8%	14%	48%	28%	**76%**
WATERSTONES	0%	3%	22%	52%	23%	**75%**
MARKS AND SPENCERS	1%	10%	16%	54%	19%	**73%**
DEBENHAMS	0%	6%	21%	57%	16%	**73%**
POUNDLAND	2%	8%	18%	50%	22%	**72%**
HMV	1%	7%	21%	51%	20%	**71%**
NEXT	2%	5%	25%	48%	20%	**68%**
ZARA	1%	8%	24%	45%	22%	**67%**
ACCESSORIZE	1%	5%	28%	50%	16%	**66%**
THE BODY SHOP	0%	5%	30%	45%	20%	**65%**
HOUSE OF FRASER	0%	6%	29%	49%	16%	**65%**
JOHN LEWIS	1%	5%	31%	45%	18%	**63%**
SCHUH	1%	5%	34%	46%	14%	**60%**
TK MAXX	2%	11%	28%	39%	20%	**59%**
OASIS	1%	6%	34%	45%	14%	**59%**

Where overall totals are same, higher 'love' percentage determines position. Only top 20 shown. For full placings, see back section.

SNACKS & CONFECTIONERY

For young adults, it seems to be a year of "down with" frivolous brands like Peperami, Pot Noodle and Haribo and "up with" more familiar well-entrenched brands like Nestle, Magnum and Mars.

As an ex-Martian, it is somewhat bittersweet to announce that Cadbury returned to the top of the snacks and confectionery pile in 2014. Looking closely at their activities during the year, I believe that Cadbury's well-deserved success has been down to three things, namely a great campaign developed based on a deep consumer insight, relevant product innovation and successfully connecting with consumers using the right mix of digital and social media channels.

Young adults buy snacks and confectionery often because they help to fuel their daily activities by providing convenient hunger or boredom stopgaps or give a moment of reward at the end of their day. No doubt the negative press about this category's contribution to poor diet must be getting through to folks given the 2.8% decline in chocolate value sales just in the first half of 2014 (Source: IRI). Cadbury managed to stay above the negativity with a fantastic campaign that kicked off in January 2014 with an irreverent TV ad featuring an office worker named Keith singing along to Bacarra's "Yes Sir, I Can Boogie" The multichannel #Freethejoy campaign goes to the heart of a core reason why people buy snacks and confectionery; namely because consuming snacks and confectionery can be pleasurable.

It is true that, given low price points for snacks and confectionery, the trial risk is relatively low for new products than say in other categories like alcohol or even some smartphone apps. The recent rollout of Cadbury Dairy Milk's Marvellous Creations, Ritz and Lu line extensions are great examples of how snacks and confectionery companies are responding to consumers' increasing desire for more creative "on-the-go" foods and their openness for crossover tastes from salty snacks to elsewhere in the confectionery aisle.

John Morgan summarised it best in his 2011 book "Brand Against the Machine" when he said that the future of branding is marketing with people and not at them. Certainly Cadbury's digital and social media activities in the recent past have been driving higher engagement among

YOUTH 100

Sophia Nadur
Founder,
Ideas 2 Launch

18-24 year olds. One that stands out in my mind is the Cadbury's Crème Egg social media campaign from earlier this year. Its paid advertising strategy focused on Facebook's "news feed" which provides a lifeline of fresh content particularly to those bored of the never-ending stream of new baby/puppy and drunken weekend photos! By linking with stuff that was happening at the moment in traditional media or in "real life", Crème Egg was able to reach 15 million young adults and engage them with tailored content.

SNACKS & CONFECTIONERY TOP BRANDS

	HATE	DISLIKE	NO FEELING	LIKE	LOVE	OVERALL
CADBURY	0%	2%	7%	42%	49%	**91%**
BEN&JERRYS	1%	3%	7%	32%	57%	**89%**
PRINGLES	0%	7%	8%	57%	28%	**85%**
KINDER	0%	5%	12%	46%	37%	**83%**
MAGNUM	0%	4%	14%	53%	29%	**82%**
WALKERS	1%	5%	12%	61%	21%	**82%**
DORITOS	1%	4%	14%	39%	42%	**81%**
CORNETTO	2%	5%	14%	47%	32%	**79%**
NESTLE	6%	4%	11%	55%	24%	**79%**
KRISPY KREME	2%	7%	14%	38%	39%	**77%**
MCCOYS	1%	5%	17%	49%	28%	**77%**
MARS	3%	8%	14%	57%	18%	**75%**
HARIBO	4%	8%	15%	48%	26%	**74%**
WRIGLEYS	1%	5%	22%	57%	15%	**72%**
KETTLE CHIPS	1%	7%	21%	46%	25%	**71%**
CARTE D'OR	1%	6%	28%	40%	25%	**65%**
TYRELLS	1%	5%	47%	37%	10%	**47%**
POT NOODLE	10%	25%	20%	34%	11%	**45%**
PEPERAMI	10%	19%	29%	24%	18%	**42%**
PROPERCORN	2%	5%	56%	25%	12%	**37%**

Where overall totals are same, higher 'love' percentage determines position. Only top 20 shown. For full placings, see back section.

SOFT DRINKS

'Florida 1 - London 0' could very well summarise the greatest highlight of the results for the soft drinks category.

Tropicana, the American breakfast dominator, climbs straight to the first position, just as it enters the competition, whilst Innocent, the virtuous British ambassador of wholesome 'healthy drinking', drops nine places to lose its position amongst the elite and become part of the lower middle class in the soft drinks world.

So what has happened to the brand that was born on a tide of crowd-sourced support, right at the core of youth activity and culture, a music festival? Why has that brand suddenly stopped resonating with young consumers? Perhaps the involvement of The Coca Cola Company made youngsters perceive the brand as less 'innocent' than it would like to be seen and almost make them feel that 'corporate' has overridden 'fun'. Maybe the once super-enthusiastic, earthily grounded 'guys next door', the brand owners, have come to an age where they are less connected with their target drinkers? The bottom line is that Innocent is dropping in the rankings, whilst Tropicana, one of its biggest competitors in the chilled juice arena, is rising to the top.

Tropicana is certainly doing something right. The recent launch of the Trop50 variant and the move to clear PET bottles so the product can be seen, and a form that describes and embodies many of the sensory attributes of the juice, not only strengthens the brand's health credentials and shelf presence, but also denotes consumer centred confidence. It is that type of confidence that communicates fearlessness to change, passion about winning, drive to look ahead and move forward. It is that type of confidence that inspires and resonates with today's youth and this perhaps what makes Tropicana so successful amongst young consumers.

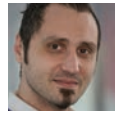
Where one Brit fails to impress, another one makes it to the elite, and with style. Robinsons notably takes the fifth place, which is a great achievement for a newly ranked entry (albeit a long established brand). What is really remarkable though, is that Robinsons is the only brand in the list with 0% haters. There is only one conclusion to be made here: sponsoring one of the major sports events in the country can be a very lucrative strategy.

Coca Cola is, as usual, worth mentioning. Although it dropped a few places in the ranking since last year, the brand received by far the greatest percentage of 'love' with a staggering 45%. This is pretty solid performance for a brand that never fails to impress with its highly creative yet focussed marketing strategies. Not only is the brand present at every major event globally, has a name affiliated with Christmas and Santa, but in a clear strategy to shed some of the commoditised, corporate mantle, and be perceived as more human, it now promotes a dynamic landscape of personalised names and friendly references printed on its label. Would you like to 'Share a Coke' and discuss this brand's success further?

The results don't seem to be that favourable for energy drinks brands as a whole. Are energy drinks becoming unfashionable?

> Sponsoring one of the major sports events in the country can be a very lucrative strategy.

YOUTH 100



Stergios Bititsios
Packaging & Consumer Research Leader, Cambridge Design Partnership

SOFT DRINKS TOP BRANDS

	HATE	DISLIKE	NO FEELING	LIKE	LOVE	OVERALL
TROPICANA	1%	5%	11%	53%	30%	**83%**
COCA COLA	4%	9%	9%	33%	45%	**78%**
COSTA	2%	6%	14%	52%	26%	**78%**
FANTA	1%	9%	15%	52%	23%	**75%**
ROBINSONS	0%	4%	26%	57%	13%	**70%**
STARBUCKS	6%	12%	16%	43%	23%	**66%**
TANGO	1%	10%	24%	47%	18%	**65%**
LUCOZADE	5%	15%	17%	39%	24%	**63%**
NESCAFE	3%	11%	24%	40%	22%	**62%**
PEPSI MAX	4%	20%	15%	38%	23%	**61%**
INNOCENT	1%	7%	33%	36%	23%	**59%**
FRIJJ	3%	12%	27%	29%	29%	**58%**
CAFE NERO	2%	12%	29%	44%	13%	**57%**
LIPTON	2%	16%	36%	32%	14%	**46%**
RED BULL	13%	27%	19%	30%	11%	**41%**
MONSTER ENERGY	14%	25%	23%	24%	14%	**38%**
NAKED	2%	8%	54%	24%	12%	**36%**
IRN BRU	9%	24%	33%	22%	12%	**34%**
BOOST JUICES	3%	17%	46%	26%	8%	**34%**
COFFEE REPUBLIC	5%	13%	51%	22%	9%	**31%**

Where overall totals are same, higher 'love' percentage determines position. Only top 20 shown. For full placings, see back section.

SUPERMARKETS

Talking about brand loyalty to supermarkets is an interesting case. These are undeniably some of the biggest brands in the UK – turn on commercial TV during prime-time and you won't have to wait long for a supermarket ad to pop up – and their stores are omnipresent in our everyday lives, but do they really inspire an emotive response from consumers?

That's especially true for 18-24s. At the younger end of the spectrum, they might never need to set foot in a supermarket without their parents, and they're certainly unlikely to be brandishing their loyalty card at the till. This is reflected in the survey results, where even the most popular supermarket brands attract 'like' or 'no feeling' responses much more frequently than inspiring respondents to declare their 'love'.

This is where Nectar Points, Clubcard and similar loyalty schemes come in, giving the shopper a physical chunk of the brand they can carry around in their pocket and a reason to come back week after week. However, I'd argue that when it comes to teenagers, supermarkets' brands are less about identity, or even loyalty, and more about convenience, whether in terms of location or price. It's probably telling that the top brands on this list – Tesco, Morrisons, Asda, Sainsburys and Co-op – are also the the UK's top supermarkets by market share. These brands are most likely to be the shop that's on the way home from school, work or uni.

But as the world increasingly turns digital, with millennials leading the way, physical location should be less of an issue. Supermarkets' storefronts are no longer limited to the high street, and their online presence needs to be equally

SUPERMARKETS TOP BRANDS

	HATE	DISLIKE	NO FEELING	LIKE	LOVE	OVERALL
MORRISONS	1%	4%	20%	56%	19%	**75%**
TESCO	1%	7%	17%	58%	17%	**75%**
ASDA	0%	5%	21%	50%	24%	**74%**
SAINSBURYS	0%	6%	21%	61%	12%	**73%**
LIDL	2%	9%	19%	44%	26%	**70%**
THE CO-OPERATIVE	2%	9%	20%	53%	16%	**69%**
ALDI	0%	8%	26%	47%	19%	**66%**
WAITROSE	2%	8%	30%	44%	16%	**60%**
SPAR	0%	13%	42%	39%	6%	**45%**
OCADO	1%	9%	68%	17%	5%	**22%**

Where overall totals are same, higher 'love' percentage determines position. Only top 20 shown. For full placings, see back section.

inviting – both on desktop and mobile. Tesco has the most developed digital offering, with well-presented websites, a variety of apps for Android and iOS, and an online-exclusive service in Blinkbox, the video streaming service it acquired in 2011.

There are always exceptions, of course. The only brand of the top four punching above its weight in terms of market share – is Morrisons, which has only recently made the move online. Currently, deliveries are limited to London and a handful of test locations, and it still lacks a mobile site for shoppers, but none of this seems to have hurt its ranking.

As the one digital-only brand on the list, Ocado would seem to further disprove this. It brought up the rear as the 10th best ranked supermarket, and 436th on the list overall – though it's worth noting that the vast majority of respondents (68%) had no strong feeling towards the brand, which possibly reflects how recently it became a standalone business.

And some of the brands on this list break all of these rules. Look at the brand which attracted most devotion – namely, Lidl. Despite having no loyalty scheme, no online shopping, relatively few and not making much effort at all with marketing beyond its promo leaflets – and despite ranking sixth out of the supermarket brands, and 86th overall – Lidl was identified by 26% of respondents as a brand they loved.

TECHNOLOGY

The last twelve months have seen plenty of exciting innovations - not least the release of two major eighth-generation consoles, and the launch of a number of smartwatches.

Perhaps the most surprising and pronounced success has been Microsoft's – they've managed to trump even Apple to take prize position at the top of the Tech category pile this year. The release of the Xbox One (Microsoft's first console in 8 years) has done plenty to raise their brand profile for 18-24s. Furthermore, its Windows 8-inspired tile interface has made using Microsoft's operating system on tablets and PCs seem familiar to an even wider audience.

At the other end of this year's Youth 100 list is Microsoft's clearest victim, BlackBerry, which Microsoft overtook in the mobile OS market in 2013. Once a smartphone giant appealing to both security-conscious business users and SMS-hungry teenagers, their popularity has dwindled with only 23% of respondents expressing positive feeling towards them. The Canadian company's once-ubiquitous messenger service BBM has been battered by the prevalence of Snapchat and WhatsApp. The announcement in late 2013 that BBM would be released on iOS & Android came far too late, and seems more like an acceptance of fate than a new direction.

Apple remain trend leaders in 2014, with the anticipation that their arrival in the smartwatch market would herald the beginnings of mainstream adoption. They made a surprise entry into the realm of fashion tech accessories a little earlier though, with the announcement of an acquisition of another of our top ten tech brands in May - Beats by Dr. Dre.

Clearly a huge endorsement for the West Coast producer's headphone brand, it is yet to be seen how Apple will bring their products together. More quietly, 2014 saw the retirement of the venerable iPod Classic in its 13th year – a reflection of the move away from locally stored media and towards streaming solutions such as Spotify and Soundcloud.

YOUTH 100

James Read
Editor,
Student Beans

Sony's success with the PlayStation 4 (dominating the Xbox in all markets) has been a huge return to form after the slower success of its predecessor, the PS3. Listening to consumers and learning from early mistakes in the previous generation of consoles, they undercut Microsoft on price and focused on core gaming function. Outside of a major console launch, 2014 has been another year of refocus a very broad business, with the sale of their PC arm in February. Their Xperia line saw the release of a new flagship mobile and tablet, and their sponsorship of the 2014 World Cup kept their logo in front of millions.

Plenty of iterations and updates coupled with new product launches has made for an engaging year, and healthy competition between the major players will continue to push innovations, especially in wearables, through 2015.

TECHNOLOGY TOP BRANDS

	HATE	DISLIKE	NO FEELING	LIKE	LOVE	OVERALL
MICROSOFT	1%	4%	8%	58%	29%	**87%**
APPLE	2%	8%	8%	35%	47%	**82%**
SONY	1%	2%	17%	50%	30%	**80%**
SAMSUNG	1%	9%	15%	46%	29%	**75%**
ADOBE	1%	4%	21%	61%	13%	**74%**
NIKON	0%	1%	30%	48%	21%	**69%**
TOSHIBA	1%	6%	44%	43%	6%	**49%**
ACER	2%	12%	41%	35%	10%	**45%**
HTC	2%	16%	38%	37%	7%	**44%**
BEATS BY DRDRE	2%	23%	33%	30%	12%	**42%**
LG	1%	13%	44%	33%	9%	**42%**
DELL	1%	14%	43%	39%	3%	**42%**
BOSE	1%	5%	54%	30%	10%	**40%**
SKULLCANDY	3%	16%	44%	30%	7%	**37%**
IBM	1%	7%	64%	22%	6%	**28%**
BLACKBERRY	12%	42%	23%	20%	3%	**23%**

Where overall totals are same, higher 'love' percentage determines position. Only top 20 shown. For full placings, see back section.

TRAVEL

It is apparent from the findings of this study that travel brands have a long way to go to engage with young adult audiences.

This is despite the fact that we live in an era when it has never been easier or cheaper for young people to travel, or simpler to share their experiences with friends and family. So what is going wrong?

Firstly, let's take a look at the top-line figures. Despite the introduction of 20 new brands into this category – a rise of 67% on last year – results remain the same when it comes to impact: travel brands appear to be the least popular brands among 18-24 year-olds. On average, travel brands were ranked around 350th.

As in 2013's Youth Report, rail-related organisations perform strongly, with two of the top five – Trainline.com and National Rail – coming from that field. This may reflect the dependency that young people in that age bracket have on the rail network for their mobility, and may also indicate why bus operator National Express also featured in the top five.

However, to justify the good performance of these companies solely by the nature of their business would be a disservice, as during the last year National Express, TheTrainline.com and National Rail all launched creative campaigns specifically aimed at appealing to 18-24 year-olds.

TheTrainline.com launched a festival finder app, enabling the user to find out where their favourite artists were playing and whether tickets remained available. National Express ran an ad campaign with Starsky and Hutch actor David Soul urging young people to take the bus. National Rail launched its #Railfie campaign, encouraging young people to chronicle their train journeys with selfies.

It is also worth noting that budget airline EasyJet resides in the top five travel brands without making any significant play towards the 18-24 year-old bracket. Is this because of the brand's long-standing reputation for giving young people access to cost-effective travel?

Lastminute.com and Expedia also joined top 10 in the travel category, after both confirmed last year they wanted to be relevant to that audience. Both, of course, also carry the money-saving message.

Within the travel category only Trip Advisor can be considered a truly useful brand. It offers the chance to attain the wisdom of crowds when it comes to destinations and hotels so can be critical in the 18-24 year-olds' decision journey. Many of the other travel brands, however, are trying to sell a physical product and therefore seem to need to find that extra 'fun' quality to appeal to the masses rather than simply offer the best deal.
In conclusion, within this category, the money saving message seems to be the only promise that resonates with the audience. However, this promise doesn't help those brands to be among the most liked brands. The report card reads "must do better" for travel brands overall.

> The money saving message seems to be the only promise that resonates with the audience.

YOUTH 100

Johary Rafidison
Global Insights Director, Grayling

It has never been easier or cheaper to travel, nor have experiences been so easy to share, so where are travel brands failing to connect? By looking at the top overall performers this will give travel brands inspiration, pause to reflect and hopefully come back stronger in the next 12 months.

TRAVEL TOP BRANDS

	HATE	DISLIKE	NO FEELING	LIKE	LOVE	OVERALL
TRAINLINE	1%	7%	34%	40%	18%	**58%**
EASYJET	2%	10%	33%	45%	10%	**55%**
NATIONAL RAIL	3%	7%	36%	40%	14%	**54%**
NATIONAL EXPRESS	2%	6%	38%	45%	9%	**54%**
EUROSTAR	1%	4%	42%	39%	14%	**53%**
TRIPADVISOR	0%	3%	47%	34%	16%	**50%**
EXPEDIA	1%	2%	51%	37%	9%	**46%**
THOMSON	2%	6%	47%	34%	11%	**45%**
LASTMINUTE.COM	1%	6%	48%	35%	10%	**45%**
MEGABUS	1%	11%	48%	31%	9%	**40%**
THOMAS COOK	2%	4%	55%	30%	9%	**39%**
TRIVAGO	2%	8%	52%	32%	6%	**38%**
VIRGIN ATLANTIC	1%	2%	60%	27%	10%	**37%**
SKYSKANNER	1%	6%	62%	22%	9%	**31%**
LATEROOMS.COM	0%	4%	66%	24%	6%	**30%**
RYANAIR	6%	20%	46%	22%	6%	**28%**
LOWCOSTHOLIDAYS.COM	0%	4%	69%	23%	4%	**27%**
FIRST BUSES	5%	13%	55%	23%	4%	**27%**
STA TRAVEL	2%	8%	64%	19%	7%	**26%**
CAMP AMERICA	1%	5%	68%	20%	6%	**26%**

Where overall totals are same, higher 'love' percentage determines position. Only top 20 shown. For full placings, see back section.

Overall brand placings

Where did they all come? Here we provide the full listing of where all shortlisted brands came in the Youth 100 research.

1. Amazon
2. YouTube
3. Google
4. Cadbury
5. Ben&Jerrys
6. Wikipedia
7. BBC
8. Microsoft
9. Pringles
10. Boots
11. Kinder
12. Tropicana
13. Ebay
14. Apple
15. Warner Bros
16. Facebook
17. Magnum
18. Channel 4
19. Walkers
20. Doritos
21. Domino's
22. New Look
23. Skype
24. H&M
25. Heinz
26. IKEA
27. Sony
28. Netflix
29. Cornetto
30. Nivea
31. Nestle
32. Dove
33. Disney
34. Coca Cola
35. Thorntons
36. Costa
37. Pizza Express
38. PayPal
39. Children in Need
40. Whatsapp
41. Krispy Kreme
42. Superdrug
43. McCoys
44. WH Smith
45. Primark
46. Subway
47. Kopparberg
48. Samsung
49. Waterstones
50. Odeon
51. Fanta
52. Sure
53. Herbal Essences
54. Morrisons
55. Mars
56. Tesco
57. Nando's
58. Converse
59. Cancer Research
60. Wetherspoon
61. Haribo
62. ASDA
63. Adobe
64. ITV
65. Comic Relief
66. Marks and Spencers
67. Debenhams
68. Sainsburys
69. ASOS
70. Spotify
71. Greggs
72. Frankie & Benny's
73. Poundland
74. Mr Kipling
75. Wrigleys
76. Snapchat
77. RSPCA
78. iTunes
79. Kettle Chips
80. Wilkinson
81. Pizza Hut
82. HMV
83. Kingsmill
84. Help For Heroes
85. E4
86. Lidl
87. British Red Cross
88. Vaseline
89. Robinsons
90. Nikon
91. The Co-operative
92. Soap & Glory
93. Simple
94. MacMillan
95. Next
96. NUS
97. Warburtons
98. Zara
99. PG Tips
100. Just-Eat
101. McDonald's
102. Cineworld
103. Hovis
104. Starbucks
105. NSPCC
106. Aldi
107. Accessorize
108. Argos
109. Alton Towers
110. Millie's Cookies
111. Carte D'or
112. The Body Shop
113. UNICEF
114. Tango
115. Rimmel
116. Ticketmaster
117. Vans
118. House of Fraser
119. Oxfam
120. Maybelline
121. Coco Pops
122. Lucozade
123. No. 7
124. EA Games
125. Bella Italia
126. Sports Relief
127. Paperchase
128. John Lewis
129. Radox
130. Nescafe
131. Durex
132. Andrex
133. Garnier
134. Persil
135. Pepsi Max
136. Lush
137. Sourz
138. Smirnoff
139. Visa
140. Thorpe Park
141. Cathedral City
142. Waitrose
143. Maxfactor
144. BiC
145. Schuh
146. Vue
147. Barry M
148. Innocent
149. TK Maxx
150. Oasis
151. Post Office
152. Rekorderlig
153. Frijj
154. TGI Fridays
155. Twitter
156. Burger King
157. The Trainline
158. Dolmio
159. Messenger
160. Ann Summers
161. KFC
162. Movember
163. Impulse
164. TRESemme
165. Gumtree
166. Jägermeister UK
167. Walls
168. Neutrogena
169. Office
170. SportsDirect
171. Cafe Nero
172. Gillette
173. JD Sports
174. Lurpak
175. Prezzo
176. Head and Shoulders
177. Matalan
178. Uncle Bens
179. Dropbox
180. Tetley
181. Sky
182. Graze
183. EasyJet
184. L'Oreal
185. Instagram
186. AdBlock
187. Chanel
188. Topshop
189. National Rail
190. National Express
191. Pantene
192. Clinique
193. Topman
194. Malibu
195. Eurostar
196. aah! Bisto
197. Clean & Clear
198. McCain
199. Schwarzkopf
200. Aussie
201. Nike +
202. Comfort
203. O2
204. Urban Outfitters
205. Levi's
206. Clearasil
207. boohoo.com
208. TripAdvisor
209. Absolut Vodka
210. BT
211. Birds Eye
212. Special K
213. Jack Daniels
214. WKD
215. Shazam
216. Miss Selfridge
217. River Island
218. Amazon Prime Instant Video
219. Toshiba
220. Buzzfeed
221. Tumblr
222. Mango
223. Swarvoski
224. Rymans
225. Staples
226. My Fitness Pal
227. Pinterest
228. MTV
229. Amnesty International
230. Jamie's Italian
231. Groupon
232. Baileys
233. comparethemarket.com
234. Ted Baker
235. Papa John's
236. Tyrells
237. The Co-operative
238. Greenpeace
239. French Connection
240. Adidas
241. MAC
242. Brothers
243. Lipton
244. BMW
245. The Prince's Trust
246. Expedia
247. Ralph Lauren
248. Budweiser
249. Vine
250. Desperados
251. SoundCloud
252. Corona
253. Zizi
254. Thomson
255. Pot Noodle
256. lastminute.com
257. Acer
258. Gap
259. Warehouse
260. Carphone Warehouse
261. Spar
262. The Guardian
263. Original Source
264. Handmade burger Co
265. OXO
266. The Slug and Lettuce
267. Nike
268. HTC
269. Gucci
270. Cosmopolitan
271. Go Ape!
272. Christian Dior
273. Louis Vuitton
274. Play.com
275. moneysupermarket
276. Peperami
277. Revlon
278. Hugo Boss
279. Beats by DrDre
280. Cafe Rouge
281. LG
282. Ministry of Sound
283. Dell
284. Benefit
285. Notonthehighstreet.com
286. Chiquito
287. Goodfella's
288. GBK
289. Red Bull
290. Carlsberg
291. Giraffe
292. Diesel
293. Cath Kidston
294. Bose
295. MegaBus
296. Talk to Frank
297. Bacardi
298. Prada
299. YSL
300. BANK
301. Jelly Belly
302. Thomas Cook
303. La Tasca
304. RightMove
305. Monster Energy
306. Mulberry
307. Foot Locker
308. GoCompare
309. Trivago
310. Virgin
311. Wagamama
312. Dr Martens
313. Propercorn
314. All Saints
315. Virgin Atlantic
316. Glamour
317. Barclays
318. Nice 'n Easy
319. VO5
320. Fitness First
321. Santander
322. Skullcandy
323. Lynx
324. VK
325. Toni & Guy
326. Naked
327. Vodafone
328. Urban Decay
329. Lambrini
330. Hellmans
331. wowcher
332. Daily Mail
333. Orange
334. Marmite
335. YoungMinds UK
336. Abercrombie & Fitch
337. Gordans Gin
338. vouchercloud
339. Ambrosia
340. Metro
341. Everything Everywhere
342. Calvin Klein
343. Irn Bru
344. Strongbow
345. Boost Juices
346. Heineken
347. Armani
348. Moonpig.com
349. Lloyds TSB
350. Takeaway.com
351. Jack Wills
352. HSBC
353. Zoopla
354. St Tropez
355. Lacoste
356. Wella
357. Remington
358. Kurt Geiger
359. E!
360. Nightline
361. Staedtler
362. LinkedIn
363. Mastercard
364. Natwest
365. FeelUnique.com
366. Las Iguanas
367. skyskanner
368. Coffee Republic
369. Crabbies
370. TOMS
371. Strada
372. Phones4U
373. Tenpin
374. YO!Sushi
375. ActionAid/Bollocks to Poverty
376. Sharwoods
377. Halifax
378. Hollister
379. Guinness
380. LateRooms.com
381. Funkeypigeon.com
382. Relentless
383. Lee Stafford
384. Nationwide
385. All Bar One
386. American Apparel
387. Tommy Hilfiger
388. Three
389. Burberry
390. Superdry
391. Mattessons
392. Ginsters
393. Blackwell's
394. Loyd Grossman
395. Reiss
396. IBM
397. T-Mobile
398. Ryanair
399. Confused.com
400. The i paper
401. Walkabout
402. Five
403. lowcostholidays.com
404. First Buses
405. UNIQLO
406. STA Travel
407. Camp America
408. American Express
409. NME
410. Model's Own
411. David Lloyds
412. Omega
413. The Gourmet Society
414. Nourishment
415. giffgaff
416. Millets
417. (RED)
418. Cover 4 Students
419. Coors
420. LA Fitness
421. InterRail
422. Pullandbear
423. TAG Heuer
424. Tinder
425. Batchelors
426. GQ
427. Financial Times
428. LiveNation
429. Blackberry
430. YouthNet
431. firebox.com
432. The Living Room
433. FiloFax
434. Oceana
435. AA Driving School
436. Ocado
437. Blacks
438. BlinkBox
439. Surf
440. Booking.com
441. Scream Pubs
442. Viber
443. Bombay Sapphire
444. New Balance
445. Endsleigh
446. Jacob's Creek
447. TalkTalk
448. 8 Tracks
449. Five Guys
450. Uber
451. Hoegarden
452. Glens
453. vInspired
454. Snapple
455. Virgin Money
456. Music Magpie
457. Stella
458. The Economist
459. YHA
460. MONT BLANC
461. FHM
462. Garfunkel's
463. RBS
464. Lavazza
465. SoleTrader
466. Red Square
467. gapyear.com
468. Bang & Olufsen
469. BSM Driving
470. Scibbler
471. DW Fitness
472. BowlPlex
473. Vice
474. Trek America
475. Byron
476. Real Gap
477. Zeo
478. Zoom Direct
479. FlyBe
480. Flight Centre
481. RED Driving School
482. Tgel
483. BrandAlley
484. 3M
485. The Sun
486. Old Mout
487. Volcom
488. Lululemon
489. Stussy
490. Contiki
491. BUNAC
492. State.com
493. Brylcreem
494. Alibi
495. Belushi's
496. Bulldog
497. OnePiece
498. About.Me
499. Elite Daily
500. Kik
501. Bing
502. Zazzle
503. Mashable
504. Young Marmalade
505. Strava
506. Mallzee

Education and Graduate Employers categories not included. See Methodology.

Education and Graduate Employers categories not included. See Methodology.

VOXBURNER

YOUTH 100

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