

**MBLM**

**BRAND  
INTIMACY  
COVID  
STUDY**



# Table of Contents

Emotional Brand Connections During COVID	3
Brand Intimacy Strengths	4
Financial Advantages of Brand Intimacy	5
Brand Intimacy Gains Strength During the Pandemic	6
COVID Study Top Intimate Brands	8
Top Performers	10
Spotlight	12
Demographics	16
Industry Rankings	18
Endurance of the Smartphone Ecosystem	19
Verizon Before and During COVID	20
Industry Insights	23
Custom Dashboard	24
Ways to Use Brand Intimacy	25
The Brand Intimacy Model	26
More On Brand Intimacy	28

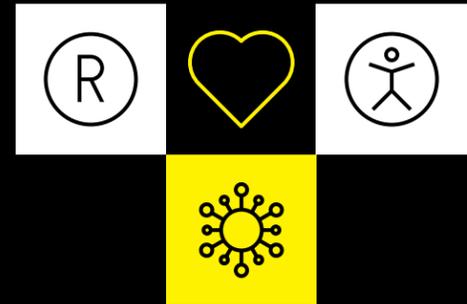
# Emotional Brand Connections During COVID

Every year we produce the largest study of brands based on emotion. Now, with over 10 years of research, theory, and practice behind us (reviewing more than 20,000 brand stories, 1,000 hours of insights, 28,000 quantitative respondents, and 225,000 brand evaluations), we wanted to better understand what happens to brand relationships during the unprecedented times we are living in.

## Now more than ever, brands need to establish powerful emotional bonds.

In short, how has COVID affected our emotional connection to the brands we use and love? We surveyed 3,000 consumers across the United States to detail their experiences across 10 industries and 100 brands. Our report focuses on highlights, insights, and rankings. You can view more details by exploring our [rankings](#) or subscribing to our [custom dashboard](#), which provides historical data, geographic insights, and competitive comparisons.

We strongly believe, now more than ever that brand need to establish powerful emotional bonds with consumers. Are you doing everything possible to build intimate brand relationships?



# Brand Intimacy Strengths

Brand Intimacy is designed to help brands meet today's complexity. It is based on a two-way relationship rather than the push-pull dynamic of yesterday and was created to foster relationships and establish trust, engagement, and longevity, valuable strengths in today's uncertain world.

## Price Resilience

We continue to observe that consumers are more willing to pay a premium for highly intimate brands than for brands with lower levels of intimacy. In addition, the more intimate you are with a brand, the more you are willing to pay for its goods and services.



Top intimate brands have double the number of consumers willing to pay 20 percent more.

## Key Advantages

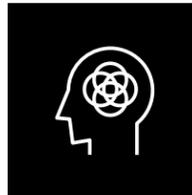
### ADDITIVE

Complements existing marketing tactics and approaches



### BEHAVIORAL

Focuses on emotional science and decision-making that drives behavior and purchase



### ESSENTIAL

Makes consumers less willing to live without the brand and increases their willingness to pay more



### ENDURING

Promotes long-term relationships and provides stability in times of crisis



### FINANCIAL ADVANTAGE

Demonstrates superiority across revenue, profit, and stock price



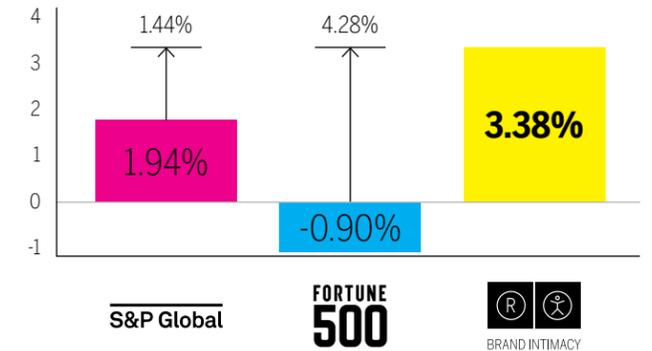
# Financial Advantages of Brand Intimacy

Intimate brands have outperformed established financial indices and the stock market during the pandemic. We have compared our top-ranking intimate brands with the Standard & Poor's 500 and the Fortune 500 top brands across revenue growth, profit growth, and stock price during the period of Q2 2019 vs. Q2 2020.

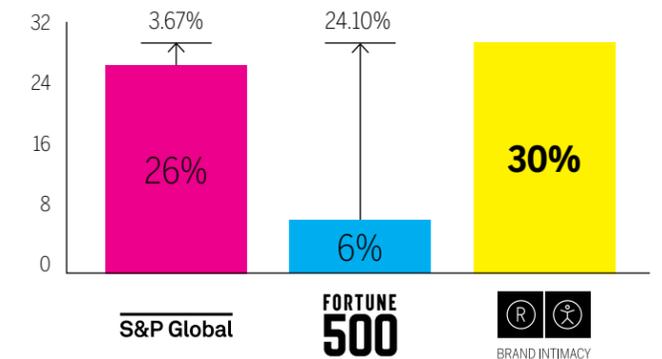
We remain encouraged by the more than 10 years of intimate brand performance analysis versus these major indices. It bears underscoring that the Fortune 500, which is made up of companies ranked by revenue, and the S&P, which includes companies ranked by market cap, both weed out weak performers over time. To beat these indices, performance in any given year and over time is a major feat.

The percentage differences highlighted to the right are significant and indicate the degree to which intimate brands generate millions more dollars in revenue and profit annually and over the long term. A helpful way to gauge these percentages is to keep in mind that the S&P has a market cap of \$30.5 trillion and the Fortune 500, \$20.4 trillion. Given the scale of companies in these indices, fluctuations up or down translate to significant sums.

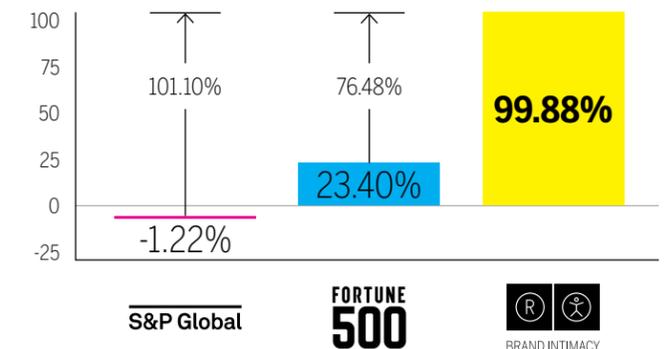
Revenue growth Q2 2019 vs. Q2 2020



Stock price Q2 2019 vs. Q2 2020



Profit growth Q2 2019 vs. Q2 2020

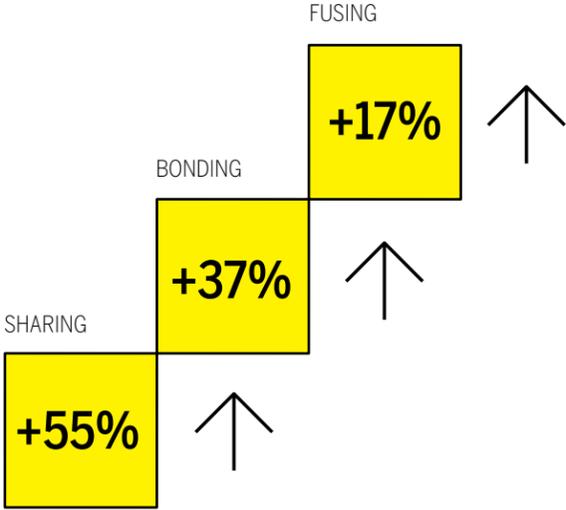


# Brand Intimacy Gains Strength During the Pandemic

Brand Intimacy is about building enduring emotional connections between brands and people. What we discovered is that during COVID, this idea has become more relevant than before. Consumers have been using this unprecedented time to begin new brand relationships and find ways to build bonds with brands.

**Deeper emotional connections with brands**

During our COVID study, respondents indicated **higher scores** across all Brand Intimacy stages, which measure the degree and depth of intensity of intimate brand relationships.



**Relationships with more brands**

Consumers surveyed demonstrated a **23 percent increase** in the number of brands they have an emotional connection with, a significant increase since our last study.

**23%** ↑



# COVID Study Top Intimate Brands

Our COVID rankings show many of our top Brand Intimacy performers continuing to lead, with only three new top 10 entrants (Google, YouTube, and Toyota). However, we do see a shift in focus, with more media & entertainment brands in the top 10 and fewer automotive brands.

Visit our [rankings](#) to explore the brands in our study and filter results by [geography](#) or [demographics](#).



BRAND INTIMACY

**10**

Industries

**100**

Brands

**COVID**

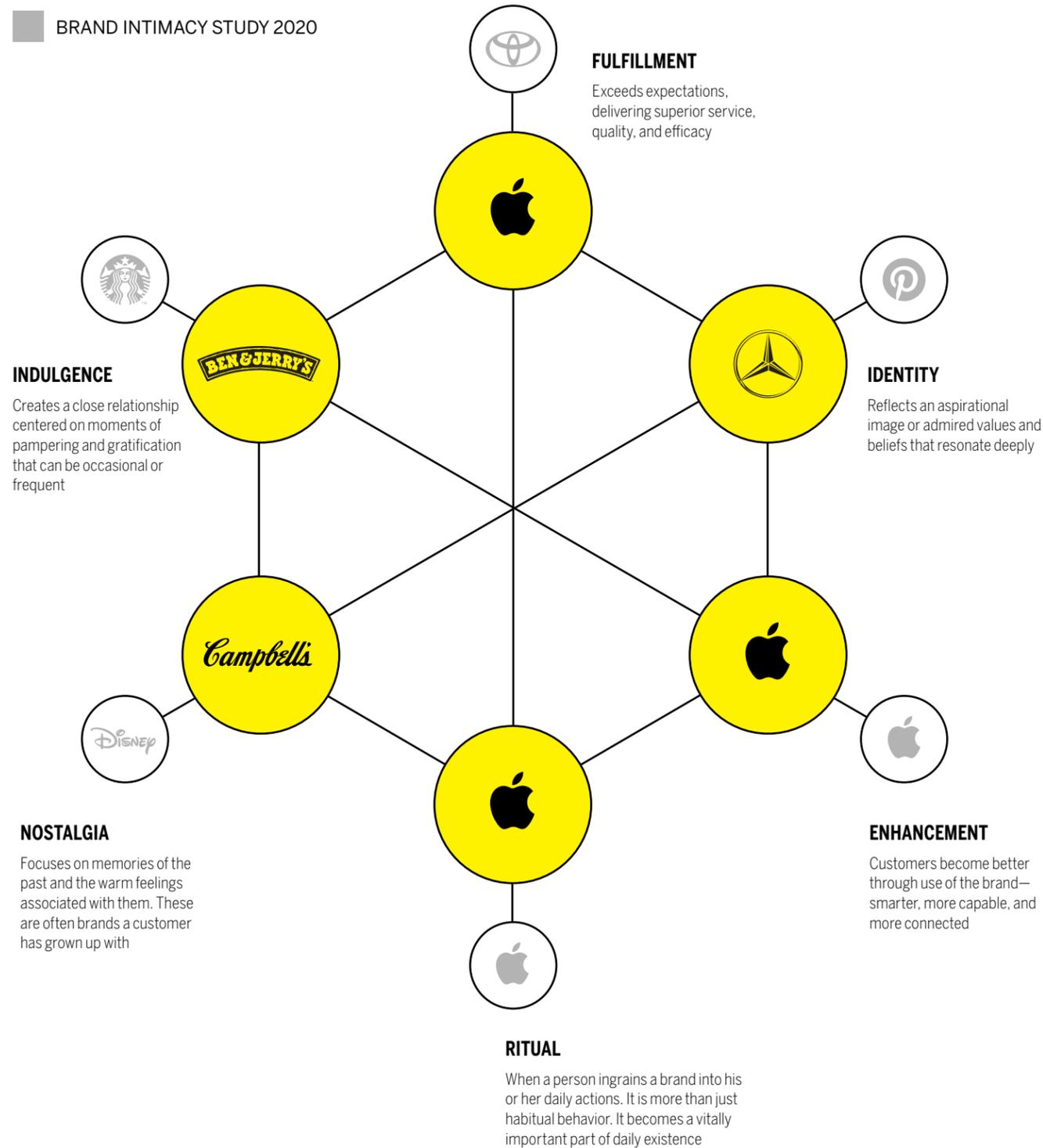
Focused

Top 10		<b>1</b>   <small>QUOTIENT</small> <b>74</b>
<b>2</b>   <small>QUOTIENT</small> <b>69.4</b>	<b>3</b>   <small>QUOTIENT</small> <b>66.9</b>	<b>4</b>   <small>QUOTIENT</small> <b>59.7</b>
<b>5</b>   <small>QUOTIENT</small> <b>58.6</b>	<b>6</b>   <small>QUOTIENT</small> <b>56.9</b>	<b>7</b>   <small>QUOTIENT</small> <b>55.9</b>
<b>8</b>   <small>QUOTIENT</small> <b>55.2</b>	<b>9</b>   <small>QUOTIENT</small> <b>54.7</b>	<b>10</b>  <small>QUOTIENT</small> <b>54.2</b>



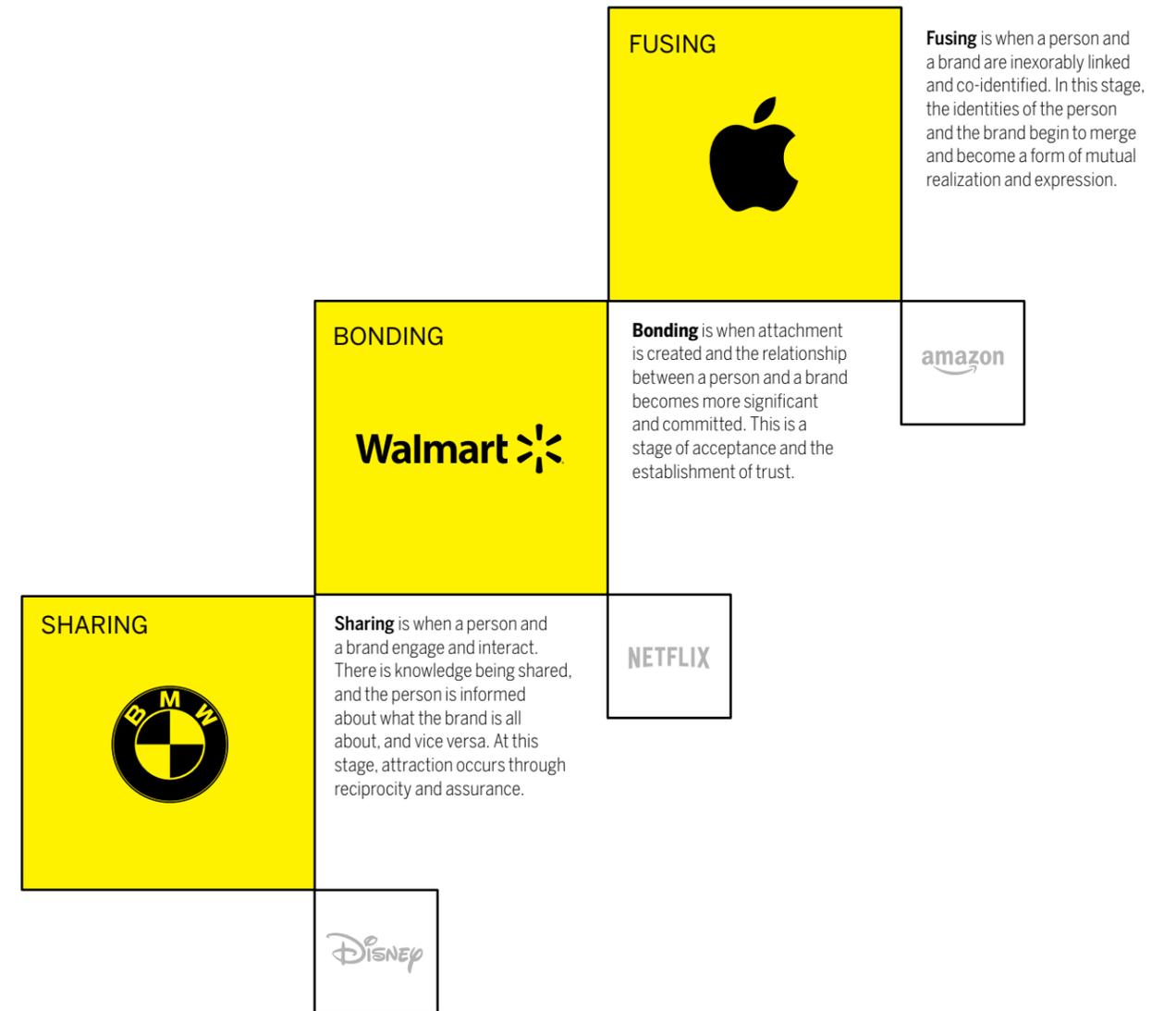
# Top Performers, Archetypes

BRAND INTIMACY COVID STUDY  
BRAND INTIMACY STUDY 2020



# Top Performers, Stages

BRAND INTIMACY COVID STUDY  
BRAND INTIMACY STUDY 2020



# Spotlight

New entrant Zoom is the brand people have increased usage of more than any other and the #1 brand for increased emotional connection during COVID, based on consumer responses.



# zoom

INCREASED EMOTIONAL  
CONNECTION SINCE COVID

# #1

BEST RESPONSE  
TO COVID

# #2

INCREASED USAGE  
SINCE COVID

# #1

# Spotlight

New entrant Purell is top ranked for best response to COVID and is the brand consumers are most willing to pay 20 percent more for, based on consumer responses.



# Purell

BEST RESPONSE  
TO COVID

# #1

INCREASED USAGE  
SINCE COVID

# #2

WILLING TO PAY 20%  
MORE SINCE COVID

# #1

## Spotlight

Netflix ranks 8th overall and is the brand with the 2nd highest increased emotional connection since COVID, based on consumer responses.

# NETFLIX

INCREASED EMOTIONAL  
CONNECTION SINCE COVID

# #2

INCREASED USAGE  
SINCE COVID

# #3

## Spotlight

Amazon ranks 2nd overall, 3rd for having the best response to COVID, and is 5th highest for increased emotional connection since COVID, based on consumer responses.

# amazon

INCREASED EMOTIONAL  
CONNECTION SINCE COVID

# #5

BEST RESPONSE  
TO COVID

# #3

# Demographics

## GENDER

Rank	Male	Female
1		
2		
3	Google	

Amazon is the only brand shared among men and women when reviewing their top 3 brands. Previously, women ranked Disney first, while men favored Ford. During the pandemic men formed deeper attachments to brands compared to women; their Quotient scores were on average 20 percent higher.

## AGE

Rank	18-34	35-44	45-64
1		SAMSUNG	
2			Google
3			
4			
5	Google		NETFLIX

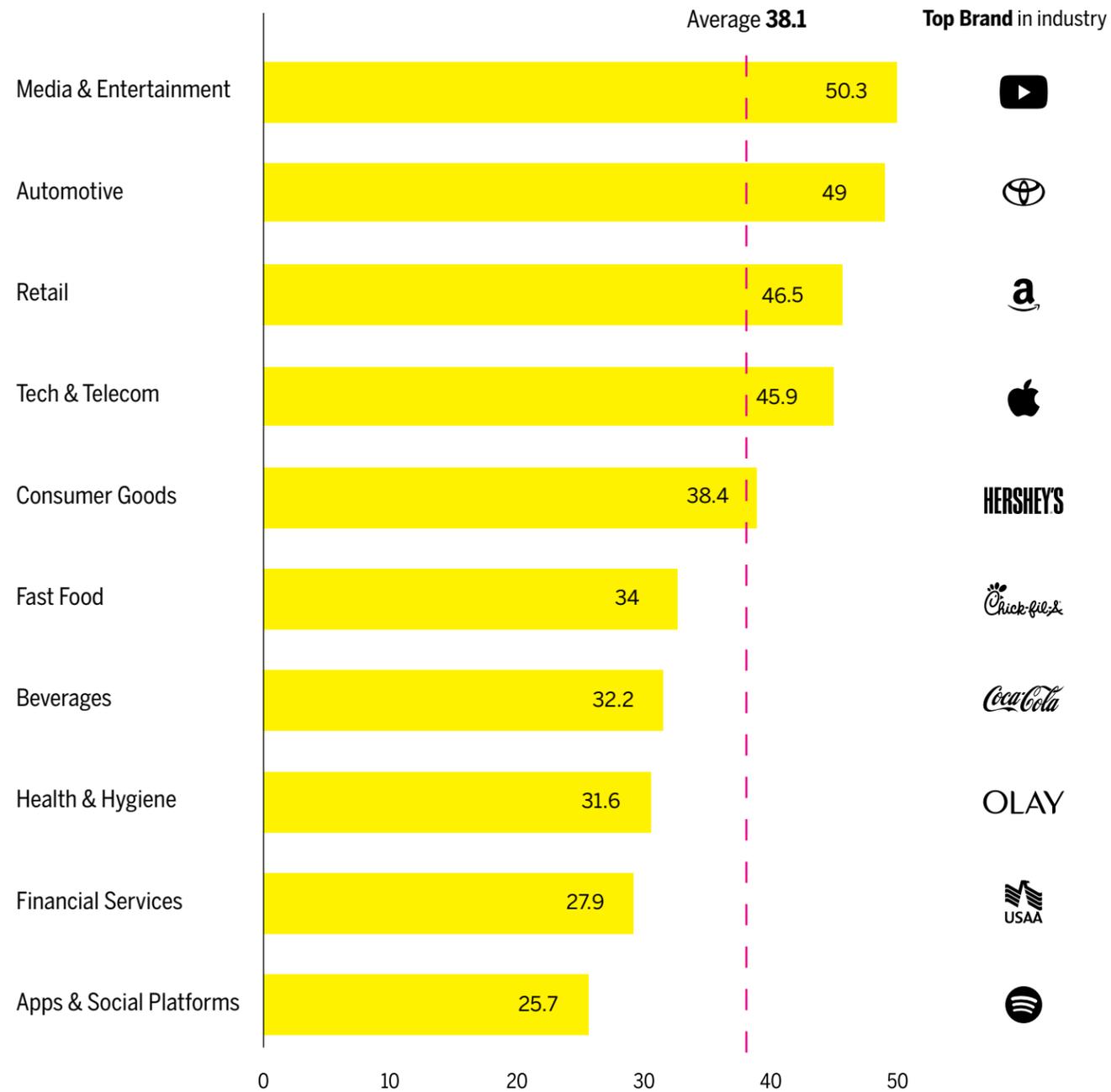
Apple and Amazon are both shared across all ages. Millennials and those aged 35-44 feature 2 retail brands on their lists, and those 45-64 have the most varied top 5, featuring 2 tech brands, 1 retail, 1 automotive and 1 media & entertainment. During COVID, consumers aged 35-44 have had the greatest increase in connecting emotionally to brands. Their average Quotient score rose 28 percent.

## INCOME

Rank	\$35-\$100K	+\$150K
1		
2	NETFLIX	
3		
4		Google
5		

Amazon and Apple are shared across income ranges. Notably, 3 out of 5 of the top brands for those making \$35-100,000 are media & entertainment brands while those making over \$150,000 had no media & entertainment brands in the top 5, instead preferring automotive brands.

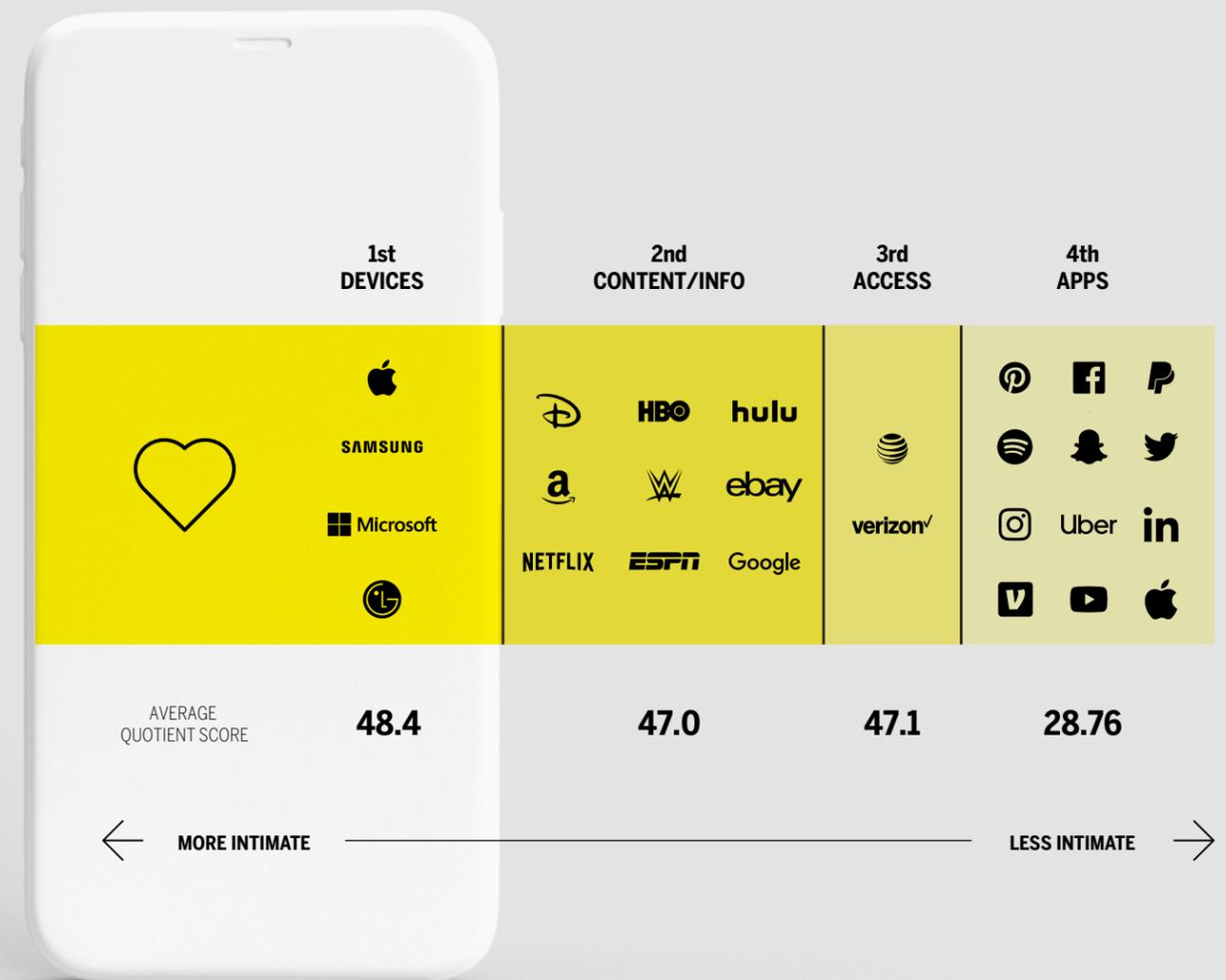
# Industry Rankings



# Endurance of the Smartphone Ecosystem

We have found over the past several years that brands that are part of the smartphone ecosystem generally outperform brands that are not. The average Brand Intimacy Quotient for those in the ecosystem is higher than the overall study average. This suggests that if a brand has a strong presence on these devices, it can expand its capacity for fostering emotional connections with users. This ecosystem has increased in strength during the COVID pandemic.

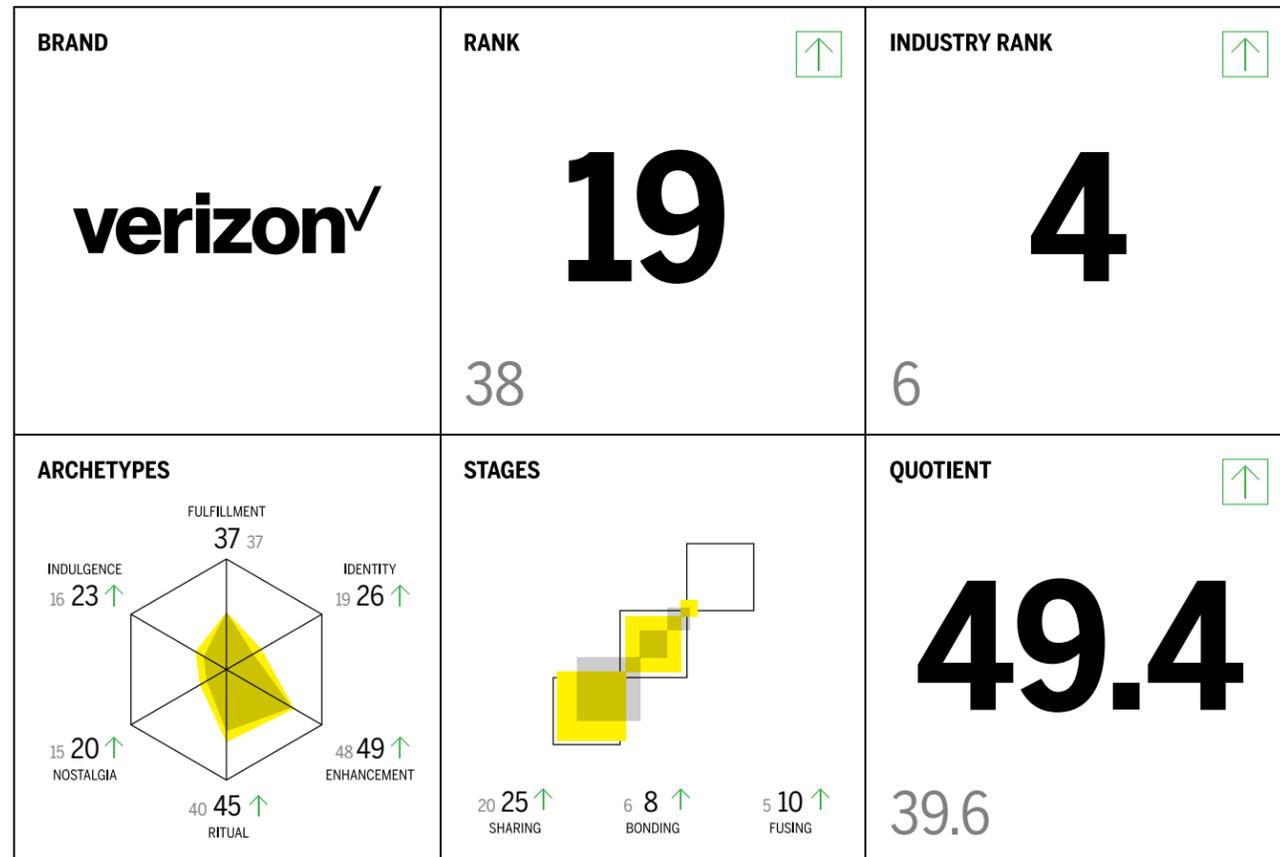
The four groups of the smart ecosystem include apps, access, content/information services, and devices. Traditionally, devices and content/info have higher Brand Intimacy scores than access and apps, which can be seen as utilities or a more ubiquitous part of the larger smartphone experience. Interestingly, we see a significant increase in the performance of access brands in our COVID study. We believe this may be linked to the importance of being connected and communicating during the pandemic.



# Verizon Before and During COVID

Verizon is a brand that has increased its emotional bonds with customers during the COVID outbreak. As an access brand, it has enabled communications in a time when many are not going out. The brand has improved across most intimacy measures, including archetypes and all

stages except fusing. Previously, Verizon had 31 percent of users in some form of intimacy. During COVID, this has increased to 43 percent. A further 51 percent of customers said their emotional connection with the brand had increased.



 BRAND INTIMACY COVID STUDY  
 BRAND INTIMACY STUDY 2020

# verizon<sup>v</sup>

**45%**  
of customers said they had used Verizon more during the pandemic



**+9.4%**  
 The retail industry has increased its overall performance during the pandemic

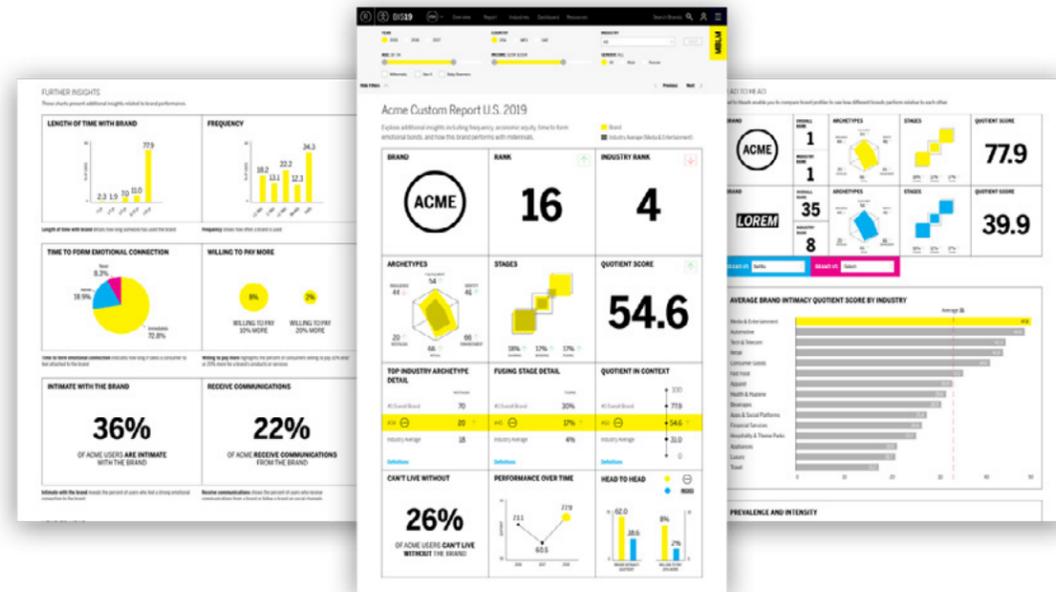
This suggests people were more dependent on ordering online to meet their needs.

# Industry Insights

<p><b>APPS &amp; SOCIAL PLATFORMS</b> </p> <p><b>24%</b></p> <p>THE <b>INCREASE</b> OF USERS IN SOME FORM OF <b>INTIMACY</b></p>	<p><b>AUTOMOTIVE</b> </p> <p><b>#1</b></p> <p>RANKED INDUSTRY FOR <b>WOMEN</b></p>	<p><b>BEVERAGES</b> </p> <p><b>25%</b></p> <p>THE PERCENT <b>INCREASE</b> OF USERS IN THE SHARING STAGE OF BRAND <b>INTIMACY</b></p>
<p><b>TECH &amp; TELECOM</b> </p> <p><b>#1</b></p> <p>RANKED INDUSTRY FOR THOSE MAKING <b>OVER \$150,000</b></p>	<p><b>MEDIA &amp; ENTERTAINMENT</b> </p> <p><b>7%</b></p> <p>INCREASE IN <b>DAILY USAGE</b></p>	<p><b>FAST FOOD</b> </p> <p><b>37%</b></p> <p>INCREASE IN <b>DAILY USAGE</b></p>
<p><b>AUTOMOTIVE</b> </p> <p><b>29%</b></p> <p>THE PERCENT <b>DECLINE</b> OF CONSUMERS <b>WILLING TO PAY 20% MORE</b></p>	<p><b>RETAIL</b> </p> <p><b>33%</b></p> <p>OF USERS <b>CAN'T LIVE WITHOUT RETAIL</b></p>	<p><b>FINANCIAL SERVICES</b> </p> <p><b>50%</b></p> <p>THE PERCENT THE SHARING STAGE HAS <b>INCREASED IN FINANCIAL SERVICES</b></p>

# Custom Dashboard

Everything you wanted to know about your brand's emotional performance can be found in the Custom Dashboard. You can compare competitive brands, examine scores year over year, review geographic findings, and examine data across a variety of filters in an easy-to-use, dynamic format.



## COMPREHENSIVE DATA ON LEADING BRANDS

EXPLORE

**24**

Unique Variables  
Performance

FILTER

Demographics  
Geography  
Income

COMPARE

Key Competitors  
Best in Class  
Past Performance

# Ways to Use Brand Intimacy



## PREDICTIVE MODEL

Leverage our simulator tool that enables you to see the impact of adjusting archetype ratings on your brand's overall intimacy score.

## REPORTS

From detailed reports and industry snapshots to deeper dives through our Custom Dashboard and custom research, we can provide more insights and findings.

## ACTIVATION

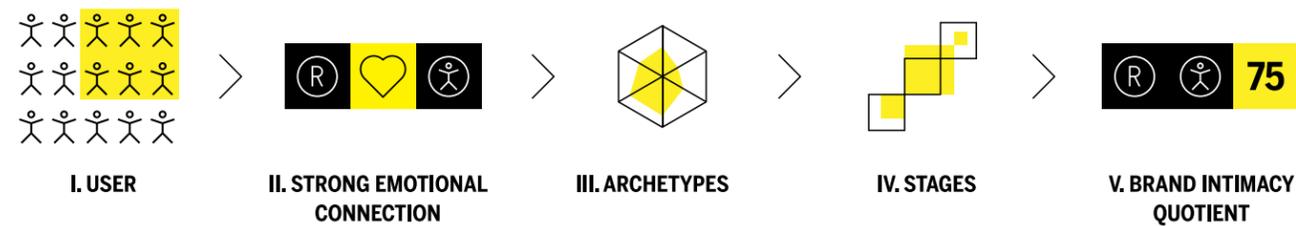
Let us create a campaign that demonstrates the visual and verbal ways your brand can build emotional connections.

## SEMINARS & WORKSHOPS

Want to bring your marketing department up to speed on the latest brand-building approach? We offer seminars and online presentations.

# The Brand Intimacy Model

A decade of research has helped determine our Brand Intimacy Model, which comprises five key components that contribute toward building intimate brand relationships. The model culminates in a Brand Intimacy Quotient, which is a score each brand receives that indicates its performance.



## I. USER

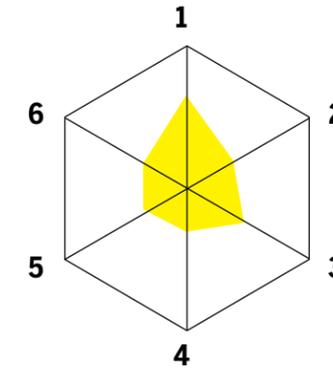
The user is the first part in our model because you cannot be intimate with a brand you have not engaged with or repeatedly tried. Think of this as similar to human relationships; you cannot be intimate with someone you are not already involved with.

## II. STRONG EMOTIONAL CONNECTION

A strong emotional connection is a key requirement and the foundation of intimacy. The greater the emotional connection between a brand and a consumer, the more powerful the relationship. This connection is determined by the degree of overall positive feelings a user has toward a brand and the extent to which a person associates the brand with key attributes.

## III. ARCHETYPES

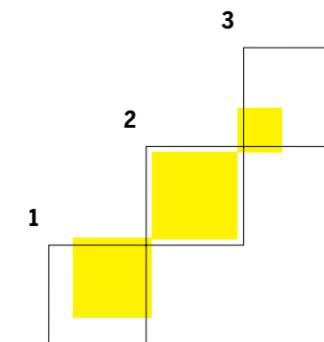
The following six patterns or markers are consistently present among intimate brands. They identify the character and nature of ultimate brand relationships and help determine their strength.



<b>1. FULFILLMENT</b>	Exceeds expectations, delivering superior service, quality, and efficacy.
<b>2. IDENTITY</b>	Reflects an aspirational image or admired values and beliefs that resonate deeply.
<b>3. ENHANCEMENT</b>	Customers become better through use of the brand—smarter, more capable, and more connected.
<b>4. RITUAL</b>	When a person ingrains a brand into his or her daily actions. It is more than just habitual behavior. It becomes a vitally important part of daily existence.
<b>5. NOSTALGIA</b>	Focuses on memories of the past and the warm feelings associated with them. These are often brands a customer has grown up with.
<b>6. INDULGENCE</b>	Creates a close relationship centered around moments of pampering and gratification that can be occasional or frequent.

## IV. STAGES

Stages reveal and measure the depth and degree of intensity of an intimate brand relationship.



### 1. SHARING

When the person and the brand engage and interact. There is knowledge being shared, and the person is informed about what the brand is all about, and vice versa. At this stage, attraction occurs through reciprocity and assurance. Should the relationship advance, it would evolve to bonding. Should it decline, it would likely cause disengagement fueled by indifference.

### 2. BONDING

When an attachment is created and the relationship between a person and a brand becomes more significant and committed. This is a stage of acceptance and the establishment of trust. Should this stage advance, it would move to fusing.

### 3. FUSING

When a person and a brand are inexorably linked and co-identified. In this stage, the identities of the person and the brand begin to merge and become a form of mutual realization and expression.

## V. BRAND INTIMACY QUOTIENT

The score assigned to each brand that ranges from 1 to 100. The Quotient is based on prevalence (the percentage of users who are intimate), intensity (where the relationship is on the spectrum of three stages: sharing, bonding, and fusing), and character (performance on key archetypes).

It is a shorthand score that demonstrates how a brand is performing relative to its ability to create ultimate brand relationships and enables comparisons to other brands in the same category or to the industry average.

## INDUSTRY REPORTS



Read detailed industry findings online and in our industry reports to explore how behaviors, bonds and usage has been impacted by COVID and which brands have fared best.

Articles further dimension insights and performance.

- APPS & SOCIAL PLATFORMS
- AUTOMOTIVE
- BEVERAGES
- CONSUMER GOODS
- FAST FOOD
- FINANCIAL SERVICES
- HEALTH & HYGIENE
- MEDIA & ENTERTAINMENT
- RETAIL
- TECHNOLOGY & TELECOMMUNICATIONS

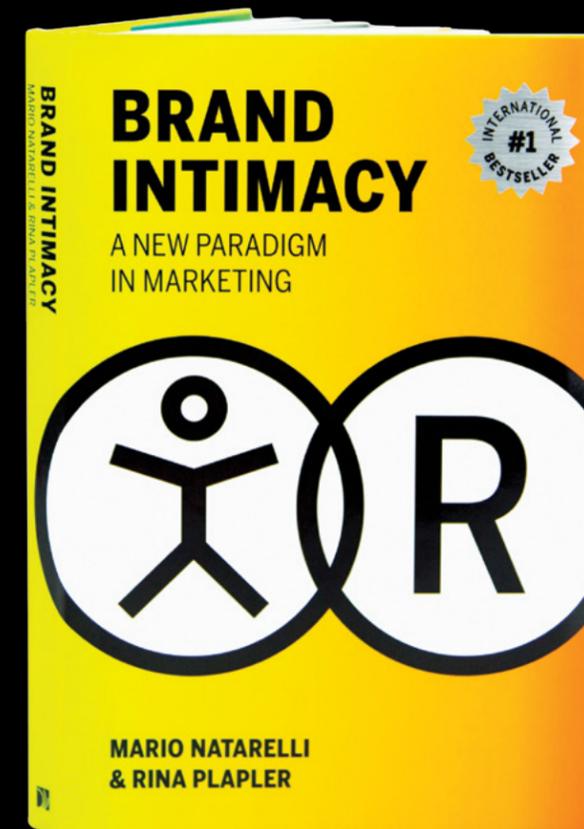
## METHODOLOGY

During summer 2020, MBLM conducted a quantitative survey among 3,000 consumers in the United States to understand the extent to which consumers have emotional connections with brands and the strength of those bonds. We also asked specific questions related to the impact of COVID on brand relationships. To read our detailed methodology

## MODEL

The Brand Intimacy model measures the intensity of intimate brand relationships and is based on being a user of the brand, having a positive emotional connection with it, and performance on a series of archetypes and stages. To view the details of our Brand Intimacy model

## A New Paradigm in Marketing



To learn more about Brand Intimacy in both theory and practice and about how to measure, build, and manage your own intimate brand, order a copy of our international bestseller.

## ACKNOWLEDGMENTS

The Brand Intimacy COVID Study is a comprehensive effort requiring coordination among researchers, strategists, writers, designers, programmers, and coordinators. MBLM would like to thank Mario Natarelli and Rina Plapler for directing, shaping, and driving this new marketing paradigm every day and making it our guiding principle at MBLM. Our thanks to our partners Amy Clausi, Claude Salzberger, Demetri Mihalakakos, and Sidney Blank.

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+1 212 979 8200  
info@mblm.com



BRAND INTIMACY

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