

Conscious Brands 100

INTRODUCTION

WELCOME TO THE CONSCIOUS BRANDS 100

The 2020s have already disoriented us all. They've shocked us, bored us, inflamed us and driven us to do things very differently. Global events are changing not just how we all feel and behave, but what we fundamentally value.

**Over half of consumers
(57%) believe that brands
need to do more to positively
impact society.**

The Covid crisis has revealed inequalities at a new level, been a catalyst for social and political unrest, and changed the way many see the world. Plenty of brands can feel the boat rocking. But who has the tools to navigate all this change?

Many of our clients are now entering a period of reflection and renewal. Some are shifting their sense of purpose. Some are focused on climate action. Others are leading on diversity and inclusion. But how do you know what matters most in the eyes of global citizens? And which brands are showing the way forward (and should you follow their example)?

We felt it was time to create a new benchmark for brands - to help provide some answers and create a springboard for change. Thus the Conscious Brands 100 was born.

What is a conscious brand?

"INTELLIGENCE IS THE ABILITY TO SOLVE PROBLEMS, WHEREAS CONSCIOUSNESS IS THE ABILITY TO FEEL THINGS SUCH AS PAIN, JOY, LOVE AND ANGER. THROUGHOUT HISTORY, INTELLIGENCE ALWAYS WENT HAND IN HAND WITH CONSCIOUSNESS."

—Yuval Noah Harari

Today, we see that there is a clear need for brands to act more responsibly – to become more ethical, sustainable and prepared to make tough calls on moral and social issues.

But good isn't good enough. If they're going to remain competitive, there is also an urgent need for brands to be more responsive – more alive to peoples' shifting identities, moods and cultures.

Wolff Olins has defined brands who play at this responsive and responsible intersection as 'conscious brands' - more conscious of their impact and more conscious of the people they serve.

We see becoming a more conscious brand as a journey, not a simple overnight switch (as culture is always changing, nobody's perfect and no brand is ever the finished article).

To help define where brands are on their conscious journey, we've created The Conscious Brands 100. Our aim is to help gauge how a brand measures up today and ultimately how it can be more conscious tomorrow.

How is the Conscious Brands 100 different?

There are lots of rankings out there already. They tend to fall into one of two camps: curator-driven, or singular metric-driven.

Curator-driven lists (built by tastemakers, editors or compiled through nominations) are undoubtedly valuable and interesting - and often showcase up-and-coming brands. But equally, they can be hard to learn from as they often list obscure or niche brands and are not ranked according to objective metrics. Conversely, metrics-driven rankings too often sort brands according to singular measures like trust or relevance. These lists are informative, but they must be seen for what they are: one part of a bigger picture.

The Conscious Brands 100 is different. We've created a multi-dimensional conscious lens that is not about singular measures (such as value or sustainability goals), but which takes a comprehensive new view of how brands need to operate in the modern world - on a personal and planetary level.

With Hall & Partners, we began constructing our research by building a base longlist of the world's leading brands, collated from a wide range of sources including existing brand indexes and recommendations from our clients and colleagues.

Consumers then scored them according to 6 key dimensions (the 6 Signs of a Conscious Brand, which you can read more about [here](#)) which take into account how a brand is perceived and how it is experienced.

Together, we have used the findings to build a combined global 100 list, as well as local UK, US and China lists. This has enabled us to rank some of the world's most famous brands, as well as making room for lesser-known local heroes.

We hope this new study provokes debate and reflection. Because this is a new era for brands, and together we want to help you lead the way.

A study that reflects the rapidly shifting values of 'Conscious Consumers'

The Covid crisis has rocked the world and accelerated change in so many aspects of our lives. Inevitably this is having an impact on consumers, how they see the world, what they value and what is important to them.

What is beginning to emerge is a real shift in values: we are seeing more 'Conscious Consumers'.

56% of consumers believe brands should take more responsibility for the wider community, society and the world.

This clearly plays out in our inaugural rankings, which are reflective of a year where the brands that are now deemed 'essential' have changed dramatically. We are also seeing that consumers place greater emphasis on values such as sustainability, social equality, authentic activism, diversity and inclusivity - and they have a greater expectation for actions rather than just words from businesses. Hall

& Partners' recent work looking at conscious consumerism ([The Value Shift](#)) has shown that consumers want very different things and there is a need and opportunity for businesses and brands to show new leadership – leadership that paints a picture of a fairer, more equal world, one where everyone gets what they deserve.

62% of consumers in the UK would be less likely or not buy from a company that doesn't have a positive ethnic diversity and racial equality policy and record

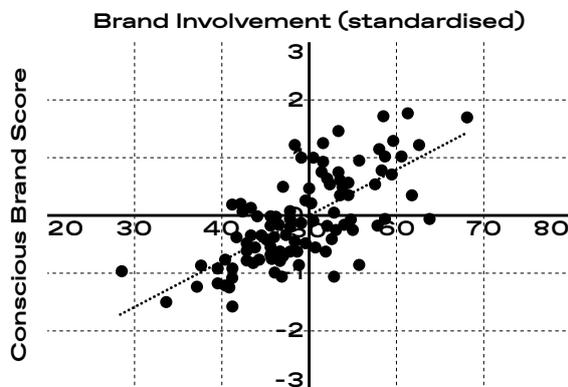
It is in this context that we have begun to consider how conscious consumers and businesses are impacting how we value brands.

Drivers of growth

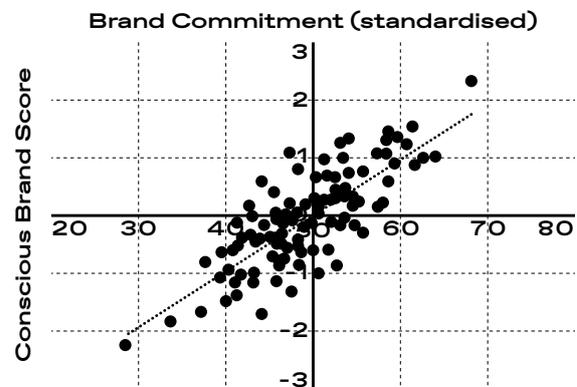
Through being more responsible and responsive to people, communities, society and the planet, our study reveals that conscious brands have stronger emotional involvement and brand commitment than less conscious brands.

Ultimately conscious brands are also more likely to grow, reflected in significantly stronger revenue growth for the best performing brands.

This demonstrates that being a conscious brand should not be seen as a nice-to-have or token initiative, but a fundamental part of your brand and business growth strategy.



Conscious brands have stronger Emotional Involvement with consumers



Conscious brands are more likely to be considered

Conscious brands are more likely to grow

Annual Revenue Growth	2019	2020
Top 15 conscious brands*	15%	17%
Bottom 15 conscious brands	7.35%	-9%

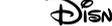
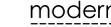
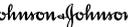
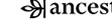
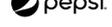
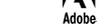
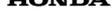
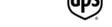
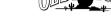
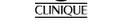
*Excluding Moderna which would increase the average to 111%!

Source: Analysis of published financial information in annual reports and other public reports

TOP 100 GLOBAL BRANDS

Welcome to the Conscious Brands 100: Wolff Olins and Hall & Partners' inaugural list of the world's 100 most conscious brands. This innovative new list ranks the world's leading brands through the eyes of consumers. You can browse the global list, see how the rankings differ in the US, UK and China, and see which industries are leading and lagging. We hope the Conscious Brands 100 provokes debate and reflection. Because this is a new era for brands and we want to help you lead the way.

To see local and industry specific rankings, go to consciousbrandsreport.com

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|--|--|--|---|---|---|---|---|--|--|
| 1 Microsoft
 | 2 Headspace
 | 3 YouTube
 | 4 Pfizer
 | 5 Google
 | 6 Netflix
 | 7 Amazon
 | 8 Disney
 | 9 AstraZeneca
 | 10 Pixar
 |
| 11 Dove
 | 12 Intel
 | 13 Apple
 | 14 Moderna
 | 15 Procter&Gamble
 | 16 Kellogg's
 | 17 Tesla
 | 18 Patagonia
 | 19 Uniqlo
 | 20 TripAdvisor
 |
| 21 IKEA
 | 22 Spotify
 | 23 Johnson&Johnson
 | 24 LEGO
 | 25 Ben&Jerry's
 | 26 Unilever
 | 27 Adidas
 | 28 Sony
 | 29 Visa
 | 30 LinkedIn
 |
| 31 Samsung
 | 32 Mastercard
 | 33 Peloton
 | 34 Always
 | 35 Ancestry.com
 | 36 Paypal
 | 37 Starbucks
 | 38 GSK
 | 39 Allianz
 | 40 McDonald's
 |
| 41 Hewlett Packard
 | 42 Nike
 | 43 The North Face
 | 44 Instagram
 | 45 Sephora
 | 46 Coca-Cola
 | 47 PlayStation
 | 48 Nescafe
 | 49 Huawei
 | 50 Expedia
 |
| 51 Dr Martens
 | 52 Pepsi
 | 53 Facebook
 | 54 Nintendo
 | 55 Vodafone
 | 56 eBay
 | 57 American Express
 | 58 Nestle
 | 59 Ford
 | 60 IBM
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| 61 L'Oreal
 | 62 Dominos
 | 63 TikTok
 | 64 AXA
 | 65 Adobe
 | 66 BMW
 | 67 Blackrock
 | 68 Pampers
 | 69 Zurich
 | 70 Virgin
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| 71 Airbnb
 | 72 Honda
 | 73 Marriott
 | 74 HBO
 | 75 Mercedes-Benz
 | 76 UPS
 | 77 Toyota
 | 78 Shell
 | 79 Zara
 | 80 Citi
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| 81 Volkswagen
 | 82 Hilton
 | 83 BBC
 | 84 Levi's
 | 85 BP
 | 86 Twitter
 | 87 Old El Paso
 | 88 Audi
 | 89 FedEx
 | 90 Budweiser
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| 91 Mars
 | 92 Chanel
 | 93 Clinique
 | 94 Uber
 | 95 Haagen Dazs
 | 96 Burger King
 | 97 Gap
 | 98 Pizza Hut
 | 99 Prudential
 | 100 Hyundai
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THE METHODOLOGY

THE METHODOLOGY

A new era calls for a new measurement approach

The challenge with traditional brand measurement approaches is they reflect what mattered in the past, rather than what matters now and in the future.

In an era when it's important to not just be more ethical, but also highly responsive, brand measurement has failed to keep up with the pace of change.

Now is the time for that change.

Wolff Olins and Hall & Partners have collaborated to create a pioneering new measurement framework. Our unique approach evaluates brands against multiple 'conscious' dimensions, such as taking actions to make the world a better place, driving reform and social change, embracing diversity and inclusivity and inspiring a sense of community.

We have also created an overall Conscious Brand Score that allows us to rank and benchmark brand performance, with the ability to diagnose relative strengths and opportunities across different conscious dimensions.

A global study of 9,000 consumers and 223 brands identifying the world's leading conscious brands

Where: UK, US, China

Who: Nationally representative adult 18+ sample, recruited via Dynata global online panel

How: 15-minute online survey

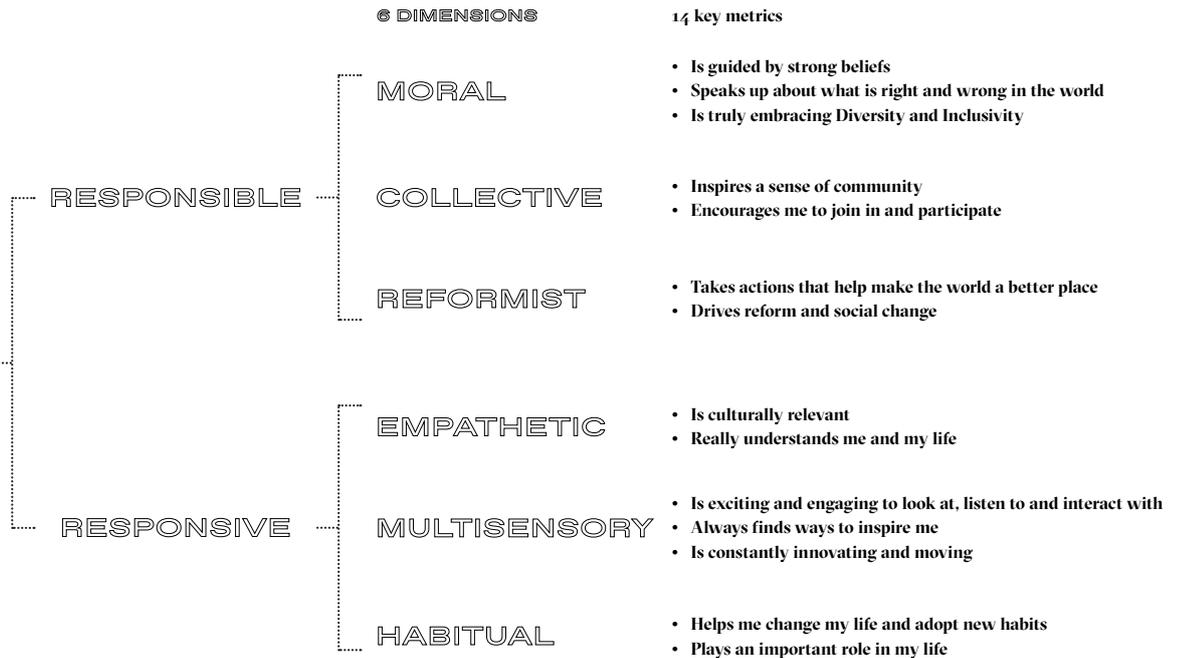
How we measured and calculated a Conscious Brand Score:

An overall Conscious Brand Score from 0-100 was created using each brand's performance across 14 metrics, reflecting the six dimensions of a conscious brand, summarised below:

CONSCIOUS BRAND DIMENSIONS	Conscious Brand Metrics
1 REFORMIST (RESPONSIBLE)	Takes actions that help make the world a better place Drives reform and social change
2 MORAL (RESPONSIBLE)	Is guided by strong beliefs Speaks up about what is right and wrong in the world Is truly embracing Diversity and Inclusivity
3 COLLECTIVE (RESPONSIBLE)	Inspires a sense of community Encourages me to join in and participate
4 MULTISENSORY (RESPONSIVE)	Is exciting and engaging to look at, listen to and interact with Always finds ways to inspire me Is constantly innovating and moving
5 HABITUAL (RESPONSIVE)	Helps me change my life and adopt new habits Plays an important role in my life
6 EMPATHETIC (RESPONSIVE)	Is culturally relevant Really understands me and my life

- Brands were evaluated on each metric using an 11 point scale.
- A brand's mean score performance on each metric was compared with the average brand performance for each metric in each market
- Performance across metrics and markets is standardised to allow comparability across metrics and markets
- Each metric and market (UK, US, China) is given equal weighting in the overall Conscious Brand Score
- Of the 223 total brands included in the study, 110 were global brands included in all three markets and in the global ranking, while the other 113 brands were only included in market-specific rankings.

Conscious Brands



THE WORLD'S TOP 100 CONSCIOUS BRANDS

THE WORLD'S TOP 100 CONSCIOUS BRANDS

Our inaugural study of the world's most conscious brands has identified some unique insights into how consumers feel about brands through this new multidimensional conscious lens.

While the reasons for each brand's success in the ranking are unique, four overarching themes emerge among the best performing conscious brands.

TOP 4 TAKEAWAYS

1. The brands people can't live without have changed dramatically

2020 was a year that changed what we value.

These rankings are unashamedly a reflection of those changing attitudes. Indeed we are partly assessing brands for their level of 'responsiveness' to individual needs and collective culture, and not purely on the basis of backward-looking brand equity.

The brands that perform most strongly are 'the new essentials' - essential both for supporting us through the toughest of times and for satisfying our most fundamental needs.

Hence we see brands that excel in the fields of communication, convenience, human connection and entertainment - and of course mental and physical health.

Our Top 10 is a timely mix - and it will be fascinating to see if brands from industries like Big Pharma - which prior to 2020 were amongst the lowest of the low in terms of categories inspiring trust - can sustain the 'Covid bump' they've enjoyed.

It is also equally inspiring and surprising to see how rapidly some brands have managed to play a credibly 'conscious' role in our lives; for example, just look at how highly Headspace ranks in the global list, how well Tesla does despite other mobility brands struggling, and how quickly brands like Beyond Meat, Glossier and Oatly have gained a place in people's hearts at a local market level.

2. The best brands have authentic 'conscious-ness' in their DNA

The world's most successful conscious brands are the ones that demonstrate they are conscious in a way that is authentic and true to their brand DNA.

Microsoft for example, uses its technology in unique and imaginative ways to help people solve the world's problems. While Disney uses its storylines and hero characters to champion diversity. Also there is Dove from Unilever, which has demonstrated a long-term focus on Real Beauty and has shown how powerful this idea can be across their comms, packaging and social media in multiple markets.

These brands avoid tokenism and 'wokewashing' by taking actions which link directly back to the brand's true DNA, helping them act consciously in ways that are unique to them. This instinctively creates a more authentic, differentiated and believable connection with consumers.

3. The most conscious brands take action across all aspects of the business

The world's most conscious brands embrace being conscious in every aspect of what they do. Demonstrating this across all touch points and experiences across their business. Whether it be with their employees, their suppliers, with customers, within a community, in society and the world as a whole.

Internally, they take actions to help their company be more conscious. Contributing above and beyond to make the world a better place. Microsoft employees, for example, donated \$221m to non-profits in 2021 and volunteered 750,000 employee hours to support good causes, in the US alone.

Externally, the most successful conscious brands are conscious in their actions across all facets of their business, with actions that help specific people, support communities and do good in the world.

4. Conscious brands tell more powerful stories

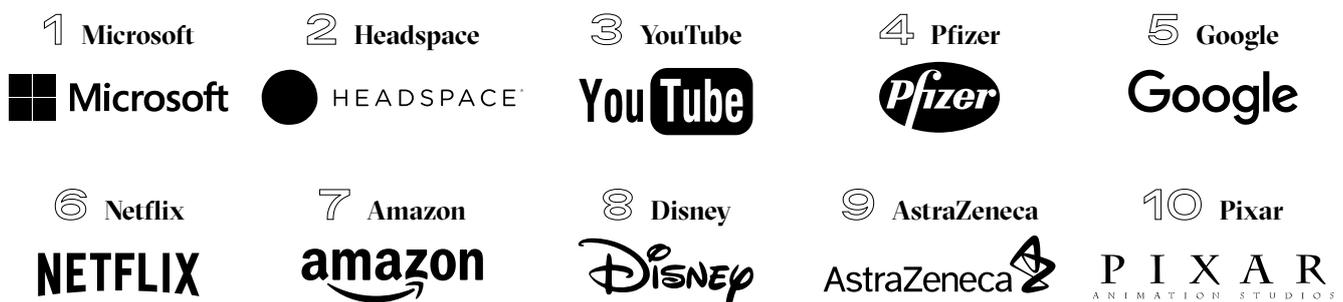
The most conscious brands communicate what action they are taking. They regularly report progress on their conscious agenda and initiatives, both internally and externally. They create a common brand voice and consistent message to everyone, internally and externally across the world.

In response to the Covid crisis many have been drawn to including stories of their conscious actions in their marketing. Some however, are fearful of putting their heads above the parapet and getting it wrong. They have seen how unforgiving people can be and how easy it is to get 'cancelled'.

However, those that build their conscious messaging into the campaigns aligning their actions with what they believe they can contribute uniquely and reaping the rewards. These campaigns are the ones that again, stay true to the brands core DNA.

Several of the top 10 conscious brands such as Google, Disney and Netflix are also using campaign stories to champion social change around diversity and on sustainability, and they are helping to raise awareness of these important issues around the world.

The Top 10 Global Conscious Brands



TOP 10 CONSCIOUS BRAND SNAPSHOTS

1. Microsoft

Using technology and philanthropy to empower people, teams, and communities to help solve the world's problems.

'Empowering every person and every organization on the planet to achieve more' has long been Microsoft's mission, and this overarching goal is clearly recognised in the UK, US and China, with the company ranking in the top three for each market.

During the pandemic, Microsoft kept consumers connected as Teams became an everyday role in life, enabling workers across the globe to continue their roles safely from their homes. This is reflected in their top-scoring conscious metric, 'Plays an important role in my life'. The brand also showcased its innovative side with initiatives such as AI for Health to help those on the front lines of research of COVID-19.

Microsoft's impressive climate change goals have been extensively covered – from achieving carbon neutrality since 2012 through to its commitment to being carbon negative by 2030. Unsurprisingly then, the company scores highly in the recognition of CEO metrics, coming top for having an inspirational CEO and modern leader.

Undoubtedly, some respondents will still think that Bill Gates (with his incredible reputation for philanthropy) is still CEO, creating something of a halo effect. But none of this should detract from the leadership of Satya Nadella who has built on this equity and centred the company around 4 key commitments: Supporting inclusive economic opportunity, protecting fundamental rights, committing to a sustainable future, and earning trust. In 2020 alone Microsoft donated \$1.9B to non-profits, nearly \$4B to diverse-owned businesses and reduced its supplier carbon footprint by 21 million metric tons of CO₂e.

Microsoft understands that its success is dependent on customers' success, but also the shared success of creating a better world. In its culture and in its products and services, Microsoft does not just seek to showcase values, but instead views them as an integral part of its strategy for growth, now and in the future.

2. HEADSPACE

Improving the health and happiness of the world through meditation and mindfulness.

Founded just over a decade ago by Andy Puddicombe and Rich Pierson, based on the former's years spent living as a Buddhist monk in a Tibetan Monastery, Headspace fits the conscious brands definition on both the responsible and responsive side. The app was founded to improve the health and happiness of the world through meditation and mindfulness and its downloads skyrocketed across 2020 as demand for wellness apps soared, rising from 1million subscribers in 2018 to 2m in 2020, plus 65 million downloads.

Ranking fourth in the US, sixth in the UK and 11th in China, the brand cuts through in all key markets, with its biggest score in the cultural relevance category, followed by a clear resonance with the survey respondents on the metric that 'it helps me change my life'.

Headspace made its content free for several audiences during the pandemic, from healthcare workers through to those that lost their jobs due to Covid, making it a great example of an empathetic brand acting both responsibly and responsively.

Clearly, we are still in the midst of uncertain times, no matter how successful the vaccination programme is. It means that the global community will need help in finding the resilience to overcome post-pandemic issues. Headspace has found a niche that can become truly transformative by offering a simple means of clearing our minds and finding a little peace.

The company continues to innovate – Mindful Earth launched in 2020, which combines BBC Planet Earth cinematography with Headspace’s wellness sessions, while in April this year, Arcade Fire released a 45-minute instrumental track entitled ‘Memories In The Age Of Anxiety’ in collaboration with the app’s Focus playlist curated by John Legend.

The brand has even partnered with Netflix, which is currently streaming 20-minute episodes of the animated Headspace Guide to Meditation.

3. YouTube

YouTube uses the power of video storytelling to spotlight social justice and environmental causes.

In a year where TikTok bagged the headlines as one of the younger social media platforms on the rise, it is easy to overlook YouTube’s incredibly dynamic array of diverse content, posted daily by specialist creators. This is a powerhouse brand from Google’s stable that stands up in its own right and consumers haven’t forgotten that. Far from it – a glance at YouTube’s 2020 Trends Report reveals exactly how engaging the platform remains, with daily watchtime for UK adults averaging 46 minutes a day and an enviable cut-through of 96% of online adults using the site each month. It is no wonder YouTube’s top conscious metric reflects that it is ‘exciting and engaging to interact with’.

And as the global adult population found themselves at home during the pandemic, YouTube delivered everything from an insight into the world and its news during a pandemic, through to education on sustainability challenges and solutions. Consumers therefore valued its free access to a variety of content above industry concerns around brand damage or media headlines highlighting extremist content and abusive comments.

It remains a place to go to learn things, which propelled it straight into daily online habits during the pandemic – from delighting UK parents during the home-schooling terms with PE with Joe Wicks, through to creator hack videos on how to make your own antiseptic hand gel when the shops had sold out.

And of course the platform remains a key source of that daily dose of music. This intensified further as the pandemic led to an exponential growth in virtual concerts – from Travis Scott’s virtual gig inside video game ‘Fortnite’, through to Andrea Bocelli’s moving Easter Sunday performance from inside the Duomo Cathedral in Milan. And as theatres across the world also shut their doors, many such as the Royal Opera House, and Andrew Lloyd Webber’s productions turned to YouTube to live-stream performances. In addition, YouTube Creators for Change is a global initiative that spotlights inspirational ‘creators’ who use the video channel to make a positive impact on the world.

4. Pfizer

Pioneering vaccines and better health for all.

Pfizer has truly helped to change the world this year by fulfilling its manifesto of delivering ‘Breakthroughs that change patients’ lives.’

It's an achievement that makes generic marketing proclamations of 'we exist to make the world a better place' ring hollow.

But Pfizer's rise - from a public trust and perception perspective - is all the more incredible when you consider how poorly pharmaceutical brands were perceived back in 2019.

Bloomberg declared that 'Hollywood's going to need a new villain', stating that Big Pharma - which was essentially hated - is now enjoying public approval ratings that are way up.

Whilst Pfizer are in the business of saving lives, Covid-19 put a spotlight on it. As soon as the pandemic hit, the company's scientists embarked on an extraordinarily complex and collaborative operation to develop a vaccine. It took almost a year, but in November 2020, Pfizer released early data that provided the first glimmer of hope that science was about to save the day. And this good news story was made even more inspiring when Pfizer publicised its partnership with BioNTech, a company founded by a husband-and-wife team of scientists who had immigrated from Turkey to Germany and collaborated with the US - all for the benefit of the world.

Pfizer's efforts were also remarkable because they were the result of decisive decision-making in an historically slow-to-move category; Pfizer's leaders were adamant that significant investment was key to achieving its stated purpose of helping people lead healthier lives. Thus, its research teams were funded, not by the government (through Operation Warp Speed), but by the company itself. Effectively, Pfizer made the right decisions in order to develop and subsequently produce the vaccine faster than anyone thought possible.

Heralded as a miracle, Pfizer's COVID-19 vaccine was first-to-market and launched the same year the virus emerged.

5. Google

Using technology to help people do more for the planet and significantly improve the lives of as many people as possible.

Google tops both the UK and US ranking, but falls outside the top 100 in China due to the world's most popular search engine being blocked in the mainland since 2002, rivalled by Baidu.

Unsurprisingly, the Google Year in Search 2020 report provides a global overview of the world during a pandemic – across 2020 the top searched for term globally was 'coronavirus' with 'coronavirus update' and 'coronavirus symptoms' also in the top ten.

Google also scores highly in terms of being a conscious brand due to the role it plays in people's lives – from its roots as a search engine, to its Chrome OS, Chromebooks, Google Workplace with Google Meet which kept colleagues and friends connected during lockdowns, and Google Classroom. The latter, which is now present in many kids' school lives and ranked tenth for globally search terms, undoubtedly helped boost the brand's responsible credentials as it kept classrooms connected as the pandemic ravaged school timetables and in-person education. The company helps people to live enriched lives and it has a corporate mission summed up as 'committed to significantly improving the lives of as many people as possible.' It's a company mantra that fuels its many successes.

The brand's cultural relevance is also highlighted in its 2020 review, with terms like 'how to cut your hair' reaching an all-time high (and perhaps indicating a lack of skill or device - 'mullet' was searched twice as much as 'buzzcut'). The most-searched

for recipes will also serve as a lasting record to 2020 trends – with dalgona coffee, sourdough and banana bread all in the top ten. Respondents to the survey scored the brand highly for providing engaging interactions, and also on the statements ‘helps me change my life’ and ‘important role in my life’- something which is borne out by the fact that in 2020, how to donate was searched for twice as much as how to save money, and the top searched job during the pandemic was a nurse.

Recognised by respondents as a conscious leader that ‘speaks up’, CEO Sundar Pichai is currently pioneering a return to work for a re-energised workforce that have reassessed how they want to approach their livelihoods.

The tech giant was also one of the first big companies to let its massive employee base work from home when the pandemic unfolded, and offered up to \$1,000 for equipment and ergonomic furniture in their home offices. It is now piloting a new ‘hybrid workforce model’ post-pandemic with a mix of office and remote working days.

Google’s sustainability mission is to ‘build technology that helps people do more for the planet’. This is brought to life in a variety of ways, including the company being carbon neutral ever since 2007 and in its stated aim of being carbon-free by 2030. In addition, Google also builds technology products that help people around the world live more sustainably. Included among these products is Google Maps which has been tailored to help users find more sustainable ways of travelling, presenting alternative methods of travel as well as routes that will minimise users’ carbon footprints.

Another layer of Google’s sustainability efforts is creating more sustainable workplaces. Examples include the innovative Google Café which uses produce that looks ‘ugly’ but is in fact merely mis-shaped foods that would otherwise never find a place on supermarket shelves and would consequently go to waste. In addition, Google is growing a ‘living’ building that generates more energy than it uses and harvests and treats water on site.

6. NETFLIX

Bringing stories, culture and diversity to the world.

Netflix’s offer was something of a streaming dream during the pandemic. Its biggest scores within the ranking relate to engaging interactions and being culturally relevant and this is clearly indicative of the programming which spans everything from hard-hitting documentaries such as commercial fishing film *Seaspiracy* through to the downright bizarre cult-smash that was *Tiger King*.

Taking on the role of a global entertainer, the brand became synonymous with anytime and any place streaming. Netflix successfully uses technology and content to help bring stories, culture and diversity to the world to inspire people in multiple ways. The brand is also seen as helping to raise awareness of inequality and the importance of diversity, inclusivity and equality. Netflix launched its ‘Black Lives Matter’ collection of movies, TV shows and documentaries, featuring more than 45 titles about racial injustice and the experience of Black Americans and promoted it by displaying a pop-up screen featuring the collection when users logged in to the service to help people make diverse choices and expand their viewing habits.

Additionally, shows such as the sartorially dazzling *Bridgerton*, were praised for their ‘colour-blind’ approach to casting, with black actors starring in the Austen-style epic mini series set in London during the Regency era, so often depicted on screen as all-white.

Netflix also helps people change their life and adopt new habits. During the pandemic, the brand created a \$100 million fund to support its casts and crew during a difficult time.

While the start of this year has shown signs of a slowdown, with US subscribers looking flat, the streaming giant remains number one.

7. amazon

Making life easier for the world with convenience, choice and affordability.

Amazon's mission is to be Earth's most customer-centric company and that goal has come to the fore during the past year when most consumer behaviour has operated online. But Amazon is no stranger to the headlines, good and bad. It's constantly under attack (at the centre of debates over tax avoidance, workers' rights and the destruction of high street retail), but it's also frequently feted as one of the world's most innovative companies and one of the planet's most important lifelines when it comes to consumables. Without a doubt, Amazon has made lives easier (especially during lockdown) with its mix of convenience, choice and affordability. Consumers scored Amazon most strongly for 'really understanding me and my life', which is a testament to their consumer-centric approach.

The brand actually outscored most of the top ten, bar Microsoft, when it came to innovating, making Amazon one of the most innovative companies on the list. By investing heavily in projects that are designed to provide a more personalised and meaningful experience for customers, the brand plays a daily role in the lives of millions, whether that's through product deliveries, Prime Video services, Amazon Music or just calling on Alexa.

Amazon is also making huge investments in sustainability - pledging to be net zero carbon by 2040, improving packing and focusing on sustainable operations. It has launched a \$2 billion Climate Pledge Fund that will invest in companies creating products, services, and technologies to protect the planet. It is also one of the largest employers, creating more jobs in the past decade than any other US company. It has invested more than \$18 billion to help small and medium businesses thrive, and is leveraging its scale for good by supporting STEM education, housing equity, hunger relief and disaster response.

8. DISNEY

Using stories, characters and heroes to promote diversity.

When Covid-19 hit, the impact to Disney was instantly tangible as it had to close all of its theme parks and resorts, impacting its teams around the world. Yet there were immediate actions from the donation of more than 270 tons of excess food from the visitor attractions to their neighbouring food banks through to the distribution of 150,000 rain ponchos to humanitarian aid organization MedShare for distribution in hospitals to prolong the use of PPE equipment. But while this experiential brand may have shuttered its live brand presence, Disney+, Disney's direct-to-consumer streaming platform, has been a transformative launch with the vast array of content delivering a universal appeal to households in need of uplifting entertainment. In fact it is the highest scoring global brand for being 'exciting and engaging to interact with'.

The platform became a place where new content, originally intended for cinema release, could be shown to a much wider audience. And from the new live-action *Mulan*, released as part of a 'premier access' experience with a \$30 charge, through to the filmed version of Broadway smash *Hamilton*, which went on to become the most-streamed movie of 2020 and Pixar's delicate animated masterpiece, *Soul*, Disney+ has championed diverse storylines and representation.

But it was beyond entertainment that Disney found for itself an even more important role, in particular inspiring both children and the community. Disney has worked tirelessly to get its characters and brand out into arenas where it is not always front-of-mind. This can be seen, for instance, through outreach in Orlando where Disney has adapted its offering to bring art and animals to children's hospitals. It can also be seen through societal purpose, most obviously in opening the Disneyland parking lot to be a vaccination site for Covid-19.

9. AstraZeneca

Pushing the boundaries of science to deliver life-changing medicines.

AstraZeneca is one of the world's largest research-based biopharmaceutical companies and has been at the forefront of developing a Covid-19 vaccine. Through its partnership with Oxford University, AstraZeneca has enabled millions of people around the world to return to some sort of normality. Consumers overwhelmingly feel that AstraZeneca's actions this past year have helped make the world a better place - even in the face of constant controversy.

Since early 2020, when the true scale of the crisis became clear, AstraZeneca has committed to defeating Covid-19 by harnessing and sharing their scientific knowledge and expertise to advance and accelerate the development of potential medicines to prevent or treat the virus.

To cope with the crisis in the developing world, AstraZeneca confirmed its vaccine would be made available to lower- and middle-income countries on a not-for-profit basis. The vaccine is also part of Covax, a global initiative that aims to supply over 2 billion vaccines to developing countries for less than \$3 a dose.

With the pandemic continuing to claim thousands of lives every day, AstraZeneca is moving quickly with clinical trials while following strict regulatory standards, and good clinical practice, guided by robust independent data safety and monitoring boards.

AstraZeneca's story is one of not just innovation, but also of global access. It'll be interesting to see if this unique combination keeps AstraZeneca's perceptions riding high for more than just a year.

10. P I X A R ANIMATION STUDIOS

Leading the animation industry with original and culturally relevant ideas.

Gaining a place in the global top ten due to recognition in all three markets, Pixar delivered a solid ranking in several categories and scored as one of the most responsive brands in the list. Admired in all markets for its engaging content, innovations and cultural relevance, Pixar's stories have a strong heritage and demonstrate diversity for all ages.

The animation powerhouse balances producing films that deliver both enormous financial success and attain glowing critical praise, crafting unique characters with heartfelt messages, that both children and adults can enjoy equally. But it is through its work in tackling and promoting societal issues that the company has been most daring.

Pixar's films have exciting and compelling messages that resonate with their audience, as well as giving a voice to communities less represented in media. The films are inspiring to both individuals as well as communities, with messages including overcoming disability (Finding Nemo), embracing outsiders (Toy Story, Ratatouille, countless others), and focusing on minority communities (recent outputs such as Coco). Social issues including environmentalism (Wall-E) and helping others (The Incredibles) are also prominent messages found throughout Pixar films. This results in Pixar's greatest strength being cultural relevance.

In recent months, it has benefited from the Disney+ effect in terms of both visibility and consumption, most notably with the Christmas Day release of Soul. Pixar has also been a pioneer in giving marginalised groups positions of leadership. Pixar SparkShorts are short films directed by people of colour and women, a stark change from the all-white 'boys club' that had dominated the animation industry since its inception. Powerful messages both in film as well as real world cases have positioned Pixar as a leader in conscious thinking in animation and media.

LOCAL BRAND SPOTLIGHTS

LOCAL BRAND SPOTLIGHTS

UK top 10

Alongside other top global performers, the UK top 10 includes the BBC, Oatly and adidas. Oatly's strong performance stands out, especially given the brand's relative youth and the fact that it's in a consumer goods category (alternative milks) that few would have previously believed as having big creative and cultural potential. But Oatly has shown that taking a provocative stance on the norms of the food industry can drive fandom and usage at massive scale. Indeed, it scores highly for 'helps me change my life' and 'is guided by strong beliefs' and Oatly's straightforward and charming tone is obviously resonating in a market that has historically been clinical and cold. Thanks to its smart blend of creativity and positivity, it's also a great example of a young brand successfully balancing the need to be both responsive and responsible.

Meanwhile, a more established brand was also recognised in every category, scoring particularly highly for inspiring and engaging interactions. adidas stepped up during the pandemic, offering their fitness apps to anyone who wanted access to all content for free and creating a #hometeam campaign to keep their consumers engaged at home. The brand has had a relentless focus on sustainability through innovation, from its partnership with Parley for the Oceans, turning plastic waste into sneakers, through to its recent Primegreen recycled fabric, promoted in a sweet commercial starring Kermit the Frog alongside tennis legend Stan Smith. adidas has shown that the whole sustainability agenda can be desirable and exciting and that in the face of competition from younger brands like Allbirds and Veja, one of the market leaders can still dominate. The brand also underlined its commitment to equality and inclusion last summer, when it retweeted Nike's 'For Once, Don't Do It' response to the #BLM movement.

US top 10

A surprise star performer in the US Top 10 is Glossier, which ranks in 2nd place. Glossier is a customer-centric brand inspired by real beauty, setting itself apart from the industry with make-up and skincare products that exemplify the 'natural look'. This focus on celebrating consumers' natural beauty positions Glossier as the highest scoring 'inspiring' brand in the US. The company's use of a wide range of skin tones in its products and imagery evokes a sense of racial equity in an industry that can often treat white skin as the default, and this is reflected in high scores for diversity and inclusion. The brand has built on this with a grant scheme for black-owned beauty businesses, set up in response to the Black Lives Matter movement in 2020, donating \$500k to foster a range of small businesses.

China top 10

While some brands like Microsoft and Pfizer are just as strong in China, Chinese consumers scored some different brands in their Top 10, with Huawei taking the top spot. Huawei is seen as both innovative and socially responsible by Chinese consumers, reflecting the brand's commitment to support the creation of a 'fully connected, intelligent world'. As well as driving forward smart technology, the company is known for its work prioritising sustainable development.

Forward-looking fashion brands also buck the wider trend. Patagonia is a loved brand among Chinese young people, appreciated for their dedication to quality and sustainability. Dr Martens is seen as a brand that helps reflect consumers' culture and identity, scoring highly for being culturally relevant and encouraging participation.

Finally, Beyond Meat sits in 10th place in China, which may be surprising given relatively low rates of vegetarianism. But going meat-free is a growing trend, and Beyond Meat's innovative and sustainable alternative is resonating with the Chinese audience and is seen as culturally relevant, supported by a collaboration with Starbucks and KFC.

Brands bucking their industry trend

Some industry categories perform better than others. As we have noted, our global rankings are led by brands in technology, entertainment, mental and physical health, communications and convenience.

But other categories don't fare as well - whether that's because they've lacked relevance in the 2020s so far (for example, travel, mobility and luxury brands) or because they struggle to drive a positive, responsible perception in the world (for example, brands in finance, alcohol and fashion).

But there are some notable exceptions that we wanted to highlight and celebrate.

Mobility

Tesla is a very interesting example. Its score is by no means perfect; it scores relatively poorly for 'understands me' and 'plays an important role in my life' as it's not accessible and frequently used by people on a massive scale - yet. But it does score highly in some aspects on both the responsive and responsible sides of the equation. For example, it's seen as 'constantly innovating' and 'speaks up for what's right and wrong in the world'.

As such, Tesla represents a true disruptor - driving innovation, excitement, reform and calling out what's wrong with the industry - but it's not yet occupying a place in people's hearts and their routines. It will be fascinating to see how this perception shifts as more and more people experience the brand first hand - rather than through the lens of social media and Elon Musk's own hype.

Fashion

Three brands stood out as bucking the industry trend within fashion, namely Uniqlo, Levi's and Patagonia. Whilst fast fashion, high street fashion and luxury fashion brands all struggled to find a place in the rankings, these three brands all made various market Top 30 lists.

As you might expect, Patagonia scored well for 'speaks up for what's right and wrong in the world'. Uniqlo surprised us however, as it scored particularly strongly for 'inspires diversity and inclusion'. It's a brand that doesn't always come top of mind in the context of D&I conversations amongst marketers (perhaps unfairly so), so it's good to see that consumers recognise Uniqlo for consistently presenting different races, genders, ages and sizes in a positive and aspirational light to a mainstream audience. In the case of Levi's, we were pleased to see that the brand's commitments to reduce water usage, and its encouragements to 'Buy Better, Wear Longer' are resonating at scale.

One brand that we were surprised to see not making the global list however was H&M. Despite launching their own 'Conscious' label, a well-advertised take-back programme and a new rental service, the brand has not yet escaped its negative associations with wastage and fast fashion.

Finance

Another brand whose own 'conscious capitalism' efforts seem to be cutting through was BlackRock. BlackRock CEO Larry Fink's 2020 annual letter discussed how the events of the past year are helping to accelerate an economic transformation. And the brand's vocal stance on ESG goals has driven its global competitors like Vanguard to take the idea of responsible investing seriously. This is made all the more impressive given how poorly financial brands tend to do in the rankings, given consumers fail to score them particularly highly overall (with Visa, Mastercard and Paypal the highest performing finance brands, featuring towards the middle of our global list).

Social media

Whilst few brands want to be seen as purely 'social media' brands these days (preferring to see themselves as entertainment, connection or just technology brands) it's fair to say that what consumers would call social media didn't perform too well.

Twitter scored surprisingly poorly on its moral scores (like 'stands up for what's right and wrong in the world') and Facebook was in the bottom 50 globally despite (or you could argue, because of) huge usage during an election year, not to mention a pandemic. A brand to buck this downward social media trend was TikTok, which having launched globally only a few years ago, made the global 100 list and scored highly for 'inspires community'. Indeed, it would have scored even more highly globally were it not for its poor ranking in the US, which was undoubtedly affected by the attempted Trump administration ban.

Conscious leaders: top 10 inspirational CEOs

BRAND	CEO
1 MICROSOFT	Satya Nadella
2 HEADSPACE	CeCe Morken
3 DISNEY	Robert Chapek
4 TESLA	Elon Musk
5 APPLE	Tim Cook
6 GOOGLE	Sundar Pichai
7 NETFLIX	Reed Hastings & Ted Sarandos
8 INTEL	Patrick P. Gelsinger
9 DOVE (UNILEVER)	Alan Jope
10 PFIZER	Albert Bourla

Behind any conscious brand and business is an inspiring CEO who demonstrates leadership and commitment towards conscious initiatives and actions.

Our study also identified which brands consumers believe have the most inspirational CEOs, led by Microsoft's Satya Nadella, who took the mantle in 2014 as Bill Gates relinquished his chairmanship.

Nadella has overseen a culture shift at Microsoft, aligning the company behind one mission 'to empower every person and organization on the planet to achieve more'. He has also continued Gates' focus on philanthropy, with Microsoft donating \$1.9B to non-profits in 2020 alone.

Some of the top 10 inspiring CEOs, such as Elon Musk and Tim Cook, have become household names and brand assets in their own right, while others may have risen to the top by letting their brands and their visions do the talking. Dove in particular is a Unilever brand, therefore headed up by CEO Alan Jope, but through its brand voice speaking up for body positivity and diversity, consumers highlighted Dove as having inspiring leadership.

CeCe Morken took the CEO role at Headspace in January 2021, as founders Andy Puddicome and Rich Pierson transitioned into roles as Chairmen of the Board. Morken headed up Headspace's Covid-19 response, and led the introduction of the Headspace Promise, which commits to providing mindfulness and meditation to groups such as healthcare workers and those who have lost their jobs resulting from the pandemic. These actions exemplify Headspace's strong positioning in the Conscious Brands 100.

Jeff Bezos (who also owns The Washington Post and Blue Origin) is notable by his absence from the list. This is something of a surprise given how highly consumers rank Amazon for its levels of innovation, as well as the fact that Bezos has led the company since founding it out of his garage in Seattle in 1994. Bezos is actually due to step down as CEO in late 2021, so it will be interesting to see who steps up - and whether they fare any better in the public imagination.

FAQS

FAQS

How did you come up with the definition of a Conscious Brand?

Brands have come a long way since the era of searing marks of ownership into casks and cattle.

Over decades, the very meaning of 'brand' - what it is and what it does - has changed with the times and brands have been variously defined as symbols, promises or experiences. Today, we see a new, 6th era of brand coming into view: the 'conscious' era.

Following the industrial revolution, brands like Kellogg's or Campbell's got applied to products as a guarantee of quality. Then with the mass media revolution, advertising became a way to give a product an emotional charge and enhance people's image or self-image – think of Coca-Cola or Marlboro. With the rise of the global corporation, brands became a way for a company like Apple or Virgin to create a sense of belonging and loyalty.

And in the last twenty years, brands like Google or Airbnb are 'platforms', enabling people to do things they couldn't do before.

At Wolff Olins, we helped create the idea of the platform brand – first with (RED) and then with a number of tech companies, including Uber. But in 2019, we started asking: what's next? And then the coronavirus crisis hit us all – and made that question suddenly much more urgent.

So, what should a brand be now and in the decade ahead?

It's clear that brands need to act more responsibly - whether that's due to pressure from consumers, employees, investors or the media.

But...

There's a risk that brands disappear down a bit of an 'ESG' rabbit hole (some even question 'Is ESG the new CSR?').

At the same time, we know that brands need to be more culturally relevant, multisensory (not just multimedia) and designed to excite the emotions.

Thus the concept of the 'conscious' brand was born and the idea that - to compete in the modern era - brands need to be both more responsive and responsible.

By partnering with Hall & Partners and building on the insights explored in previous reports (like Radical Everything, Zero Hero, Sustain and The Value Shift), we have given a deeper definition to what a conscious brand is and how it can be measured.

Side note: We also love the way the word 'conscious' derives from the Greek for 'knowing together' as it suggests a greater drive for mutual understanding - between brands and the world, and between ourselves and our partners.

How did you create the Six Signs of a Conscious Brand?

After we characterised the definition of a conscious brand as being both more responsive and responsible, we wanted to break down our definition further; we were keen to give people examples of the specific kinds of behaviours or 'signs' you might identify a conscious brand by, and give them some examples of brands who displayed these signs too.

We defined six key signs in this article - three of them relating to the responsive side, and three to the responsible.

These signs then helped us to develop a research questionnaire, giving us a clear lens to develop consumer-facing questions through. We gave the six signs equal weighting, which meant that brands were assessed in a balanced way. However, we did not mandate that brands had to do well across all six signs to make the cut. Indeed, we believe that it's far fairer, more insightful and actionable to work out if some brands over- or under-perform in certain areas and still perform well in the rankings.

Whilst the signs will remain a constant, our ambition is to use our research to keep updating our examples of which brands excel at delivering each of these six signs.

METHODOLOGY

What panel did you use and how did you ensure great data quality?

The study was run through Dynata. Dynata is one of the largest online panels in the industry with presence in 37 countries and over 16 million opted-in panellists for consumer and business panels. Using the scale of Dynata panels and their partners, targeted recruitment and digital technology, they can provide access to large sample sizes as well as niche, hard to reach audiences.

Dynata adheres to the globe's most stringent guidelines for panel management and data quality by being members of many industry associations such as ESOMAR, MRS or American Marketing Association and are committed to quality.

We ensured that we only captured quality responses by first asking brand awareness, to guarantee that only those who knew each brand could answer about them. We also allowed a 'don't know' option, to avoid those who weren't sure to guess an answer.

www.dynata.com

What was your sampling approach?

We used a 15-minute long online questionnaire answered via mobile and desktop. In China, the questionnaire was translated into Mandarin by a specialist translation agency. Fieldwork occurred in the UK, US and China between 24th March and 9th April.

In each market we set quotas to achieve a nationally representative sample of adults based on age, gender and region.

How did you present the brands to consumers?

Brands were shown to consumers using their consumer-facing brand logo to maximise recognition and avoid misattribution to similarly-named brands.

How did you ensure the survey was GDPR compliant?

No personally identifiable information (PII) was captured as part of this study. All permissions were in place via the panel, and therefore the participants, to collect and use the data for the manner it was collected. Data is anonymised and has been analysed at an aggregate level only. No responses are attributable back to individual participants. Hall & Partners is an ISO27001:2013 accredited company and as such has all the necessary systems, processes and controls in place to safeguard any data we may collect.

How do you think COVID has influenced results?

Naturally, consumers will be sharing their feelings towards brands based on their recent experiences of the Covid-19 pandemic. This is reflected in the strong performance of brands who have delivered vaccines and their high scores as brands who have 'made the world a better place'. Similarly, it is evident in the strength of technology and other sectors which have become essential to our lives during lockdowns. We feel this is an important snapshot of what matters to consumers at this moment in time, which has had a permanent effect on what they expect from brands.

CRITERIA

How did you decide which brands to include?

We wanted to do something with global relevance and demonstrate how it's possible to deliver conscious thinking at scale. We chose established and visible brands with public profiles within at least one of our markets, with a focus on brands with global reach. Importantly, we chose to focus on consumer-facing brands in this study, reflecting brands which consumers interact with in their daily lives. This is why there are no pure B2B brands (that consumers wouldn't commonly recognise).

Why did you focus on China, the US and UK?

We wanted to strike a balance between a few competing ideals: we wanted to gain deeper insights into the markets we work in most (the UK and the US); we wanted to ensure that this wasn't just a Western picture, hence the inclusion of China, one of the world's biggest markets. And we wanted to make room for some of the most exciting new up-and-coming local brands with global potential, many of which emanate from these three markets.

I want to see a more granular read on the results. How can I access further information?

Our data has a lot of rich insights on how to build brand strength in different sectors. If you want a deep dive into your brand or market sector on how you can create a more conscious future then please get in touch.

WHERE NEXT?

WHERE NEXT?

Helping you progress and embrace the new Conscious era.

WOLFF OLINS

At Wolff Olins, we help create transformative brands that move businesses, people and the world forwards.

It's our belief that the kinds of brands that can help make these transformative leaps possible are conscious brands.

But building one is no mean feat. It's not something you can do overnight and it's not something you can do alone.

So where to start?

To answer this question, we've been developing a new Conscious Roadmap alongside our new Top 100 and report. The Roadmap plots out the key steps and tasks you'll need to tackle along your conscious journey.

It begins with what we call a conscious 'Calibration' - assessing where you are now and where your relative strengths and weaknesses lie. This involves utilising our proprietary research to dig deeper into your Conscious Brand Score and analyse how it looks across the [six signs](#), as well as when compared to competitors and comparators.

To see how we can help you take the first step on your conscious journey, get in touch via

consciousbrands@wolffolins.com

<https://www.wolffolins.com/>

At Hall & Partners, we believe that every business has the power to make a positive impact on the world.

We have seen a newly emerging conscious agenda, one that expects businesses and brands to do more, and behave responsibly and ethically.

As outlined in this Conscious Brands Report, many businesses are already acting more responsibly, making a contribution to society and the world beyond their own interests. As we emerge from the crisis, we are also seeing a radical shift in consumer values, as people begin to re-evaluate what matters to them in their lives.

As a consequence, there is a growing need and opportunity for brands to bring consciousness into their brand and marketing strategies. And, in doing so, help create a virtuous cycle of doing good between business, brands and consumers.

When businesses and brands adopt these new conscious strategies, there is a danger that they continue to evaluate and track their progress using well established, but increasingly outdated models. Many were invented in a different time and have lost their relevance and meaning.

We believe you should measure your performance against how you intend your marketing to work. Our unique, conscious evaluative framework measures all the ways you intend to build a brand relationship. Integrating, for the first time, conscious actions such as making the world a better place, driving reform and social change, embracing diversity and inclusivity, and inspiring a sense of community.

Our Conscious Brand Measurement Framework will help you navigate the new conscious agenda, understand conscious consumers more deeply and track performance against intention; all to help you drive growth in a post-COVID world.

We hope you enjoyed this snapshot of our proprietary research. Get in touch today for access to all the data via the Conscious Data Hub and our latest thinking on the Consumer Value Shift, including case studies and insight news on the latest conscious brand activity.

www.hallandpartners.com