

**PRESS RELEASE**

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**The 2015 Brand Keys Loyalty Leaders List**

**Streaming Video Brands Stream to Top of 2015 List**

**Digital, Social and Online Brands Make Up 85% of Top 20**

NEW YORK, NY October 13, 2015 – Netflix, Amazon, Apple, Facebook, Google, and YouTube lead the 2015 Brand Keys Loyalty Leaders List, the 19th annual survey conducted by Brand Keys ([brandkeys.com](http://www.brandkeys.com)), the New York-based brand and customer loyalty and engagement research consultancy.

“There have been real shifts in loyalty leadership, not only for brands appearing in the top 100, but especially in the top 20,” said Robert Passikoff, Brand Keys founder and president. Eighty-five percent (85%) of this year’s top 20 companies are represented by digital technology and social networking brands or brands that facilitate digital technologies or social networking.

**Connection, customization, engagement – the ultimate loyalty yardstick**

“Consumers haven’t entirely downgraded traditional brands,” noted Passikoff. Grey Goose vodka (#14), Dunkin’ Donuts (#17), and Hyundai (#19) are in the top 20. “But brand loyalty is being driven by emotional engagement and the 2015 rankings, especially as they relate to consumer outreach and entertainment, make it abundantly clear that consumer expectations regarding connection, customization, and engagement have become the ultimate loyalty yardstick.”

**2015 Top 20 Brand Keys Loyalty Leaders:**

1. Netflix: video streaming
2. Amazon: tablets
3. Apple: smartphones
4. Apple: tablets
5. Facebook: social networking
6. Google: search engines
7. YouTube: social networking
8. Amazon: online retail
9. WhatsApp: instant messaging
10. Amazon: video streaming
11. Samsung: smartphones
12. Zappos: online retail
13. iTunes: video streaming
14. Grey Goose: vodka
15. Kindle: e-readers
16. LinkedIn: social networking
17. Dunkin’ Donuts: coffee
18. PayPal: online payments
19. Hyundai: automotive
20. Twitter: social networking

With 753 brands in 68 categories surveyed, there’s tremendous competition for the top 100 spots. “This year certain categories rose to the top because of the high levels of engagement that consumers show and their ability to deliver better than their competition when it comes to consumers’ increased expectations in virtually everything,” said Passikoff. “This was particularly true for streaming video brands, with Netflix moving to #1, Amazon and iTunes in the top 20, and HBO GO appearing for the first time.”

**What a Difference Five Years of Digital and Mobile Make!**

“The development of the digital mobile world has dramatically changed how consumers communicate and engage with each other and brands,” said Passikoff. “That change has shown up in equally dramatic shifts in the top 100’s category composition of Loyalty Leaders as well.”

**2015 Category Composition of Top-100 Loyalty Leaders**

Some changes have been due to the disappearance of Personal Care, Breakfast Cereal, Digital Cameras, Pet Foods, and Catalog brands among the top 100 Loyalty Leaders. “But, if you watch the marketplace, some of those shifts are self-evident,” noted Passikoff. “Personal Care products battle for differentiation in an overcrowded category. Smartphones have replaced the need for Digital Cameras, and online or mobile outreach has substituted for last-century catalogs. Social Networking, Streaming Video, Tablets, and E-readers were the exceptions rather than the rule a decade ago but now they account for the largest category of brands – 25% ­– on the 2015 list.” Other significant changes showed up in Automotive and Financial Services, both of which have doubled their brand representation, and in Online Retailers, which increased by a factor of six.

**2010 Category Composition of Top-100 Loyalty Leaders**

Alcoholic Beverage brands appearing have decreased by 40%. Search is down to only one brand – Google. “The number of bands representing Retail, Hotels, and Out-of-Home Coffee Purveyors have remained generally unchanged,” said Passikoff. “But Fast-Casual Restaurants, which have had dramatic effects in their own industry causing problems for traditional Fast-Food brands, are showing up in the top 100 in greater numbers every year.”

**10 New Brands Replace 10 Old Brands**

“Ten of the top 100 Brand Keys Loyalty Leaders this year are represented by new brands,” noted Passikoff. Four are clothing or apparel retail brands: Under Armour (#41), Ralph Lauren (#43), Old Navy (#57), and Forever 21 (#88).

Three others were digital/technology/app brands including: Uber (#21), HBO GO (#78), and Microsoft Surface (#98). The remaining three new entrants included: Zubrowka vodka (#30), Chevrolet (#50), and Home Depot (#95).

**Personal Care Brands Get Trimmed Again**

“Cosmetic brands did not fare well last year and didn’t make the cut this year either,” stated Passikoff. “The emotional engagement that women share with their favorite beauty brands can be very powerful, but again, consumers are looking harder for a reasons to believe, engage with – and buy – one brand versus myriad ‘me-too’ products,” said Passikoff. Only 8% of this year’s top 100 Loyalty Leaders represent cosmetic brands, and included: Sephora (#25), Lancôme (#39), Estee Lauder (#53), MAC (#54), Mary Kay (#64), Clinique (#76), Neutrogena (#65), and Revlon (#89).

“Cosmetic brands need to find something more than a broad pallet of autumnal colors as a differentiator,” pointed out Passikoff. With the exception of Sephora and MAC, all the other brands moved *down* in their rankings on the 2015 Loyalty Leaders List. Cover Girl, Elizabeth Arden, Maybelline, and Max Factor didn’t appear on this year’s list!

Other brands missing included: Viber, Mizuno, Overstock.com, Pandora, Parrot, and Samsung (in the flat screen TV category). “Although we should note that Samsung *was* #11 for smartphones and #37 for computers,” said Passikoff, as a number of brands show up on the list in multiple categories, with Apple and Amazon among them.

**Drinking, Driving, Dining**

Five (5) vodka brands made this year’s list. Grey Goose maintained its loyalty lead (#14, +11), followed by Ketel One (#44), Tito’s (#59) and Smirnoff (#68). New to the category was Zubrowka, a Bison grass-flavored vodka, at #30, reflecting consumers’ zest for novel taste experiences. In another instance that mirrors the marketplace, only one regular beer brand – Sam Adams (#69, +8) made the top 100. When it came to non-alcoholic drinks, coffee was beverage-of-choice, with Dunkin’ Donuts at #17 (-7) and Starbucks at #40 (+10). No soft drinks – regular or diet – made the top 100 rankings, also reflecting the decline in the category.

“Consumers are loyal to their car brands though,” said Passikoff. Eight (8) automotive brands made the top 100 on the 2015 Loyalty Leaders List, including: Hyundai (#19), Ford (#22), Toyota (#36), Subaru (#45), Chevrolet (#50), Jeep (#63), KIA (#80), and Nissan (#86). “All the automotive brands moved *up* this year,” observed Passikoff, “KIA moved up 20 spots, and Chevrolet appeared on the list for the first time, right in the middle (#50).”

When it came to food, only four fast-casual restaurants and two pizza brands appeared on this year’s list, including: Chipotle (#23), Panera (#48), Chick-fil-A (#55), Au Bon Pain (#70), Domino’s (#58) and Papa John’s (#71), all of those restaurant brands moved *up* this year’s list as the category’s competitive set continues to shrink in same-store sales.

**Retailers Ring Up Higher Ratings**

The number of traditional retail brands nearly doubled this year. “The consumer shift to online and mobile shopping has forced traditional retailers to work harder to provide customers with something more engaging than low-lower-lowest pricing strategies,” said Passikoff. “Some have been very successful and it’s not only showing up on our Loyalty Leaders List, but on the retailers’ bottom lines as well.”

The nine retail brands that appeared strong this year are: Ralph Lauren (#43, new to the list), Old Navy (#57), J. Crew (#60), Victoria’s Secret (#61), The Gap (#73), T.J. Maxx (#75), Forever 21 (#88, also new to the list), and Macy’s (#94). In the Retail Home Improvement category, Home Depot made the Loyalty Leaders list for the first time, in the #95 spot.

**2015 Biggest Loyalty Winners**

Loyalty and consumer engagement are leading-indicators of consumer behavior toward a brand. Axiomatically, the better consumers behave toward a brand, the better the brand usually does in the marketplace, and marketplace activity ultimately shows up on the brands’ bottom lines. This year the 10 brands with the greatest loyalty gains were:

KIA (+19)

T.J. Maxx (+17)

Nike (+15)

Papa John’s (+14)

Victoria’s Secret (+14)

Google Play (+13)

Amazon (video streaming) (+12)

Netflix (+11)

Discover (+11)

Grey Goose (+11)

**The Biggest Loyalty Losers**

Brands that showed the greatest loyalty losses were:

HTC (-66)

Tumblr (-47)

Spotify (-37)

iMessage (-22)

Clinique (-21)

iTunes (online music) (-15)

Ketel One (-15)

Neutrogena (-14)

Grand Theft Auto (-14)

Whole Foods (-13)

Beats (-13)

Some of the shifts in ranking are due to the inclusion of new categories and of brands that better meet – or even exceed – customer expectations. But no matter the category, brands that understand that real emotional connections serve as a surrogate for added-value have succeeded. “And brands that have made loyalty and emotional engagement a strategic priority” noted Passikoff, “always show up high on the Loyalty Leaders list and always appear atop consumers’ shopping lists.”

**Methodology**

Brand Keys Loyalty Leaders analysis was conducted in September 2015 and includes assessments from 40,128 consumers, 18 to 65 years of age, from the nine US Census Regions, who self-selected the categories in which they are consumers and the brands for which they are customers. Seventy-five percent (75%) were interviewed by phone, 20% via face-to-face interviews (to account for cell phone-only consumers), and remaining consumers assessed categories and brands online. The 2015 Loyalty Leader assessments examined 68 categories and 753 brands.

Unlike economic use models, which rely heavily on historical data and profitability conjecture, the Brand Keys Loyalty Model and rankings are 100% consumer-driven, and are predictive, leading-indicators of brand and corporate profitability. “The good news is that brand loyalty is understandable. The better news is, it can be quantified and predicted,” said Passikoff. “And, today, knowing what’s coming down the road from a category and competitive perspective can give a brand an extraordinarily powerful advantage.”

For the complete top-100 2015 Loyalty Leaders List, [click here](http://info.brandkeys.com/acton/attachment/943/f-0060/0/-/-/-/-/Brand%20Keys%202015%20Loyalty%20Leaders%20Top-100%20List.pdf).

For more information regarding the Brand Keys 2105 Loyalty Leaders List, your brand’s position on the list, or general information about integrating predictive loyalty and engagement metrics into your marketing efforts, contact: Leigh Benatar at [leighb@brandkeys.com](mailto:leighb@brandkeys.com?subject=2015%20Loyalty%20Leaders%20top-100%20List) or 212-532-6028.