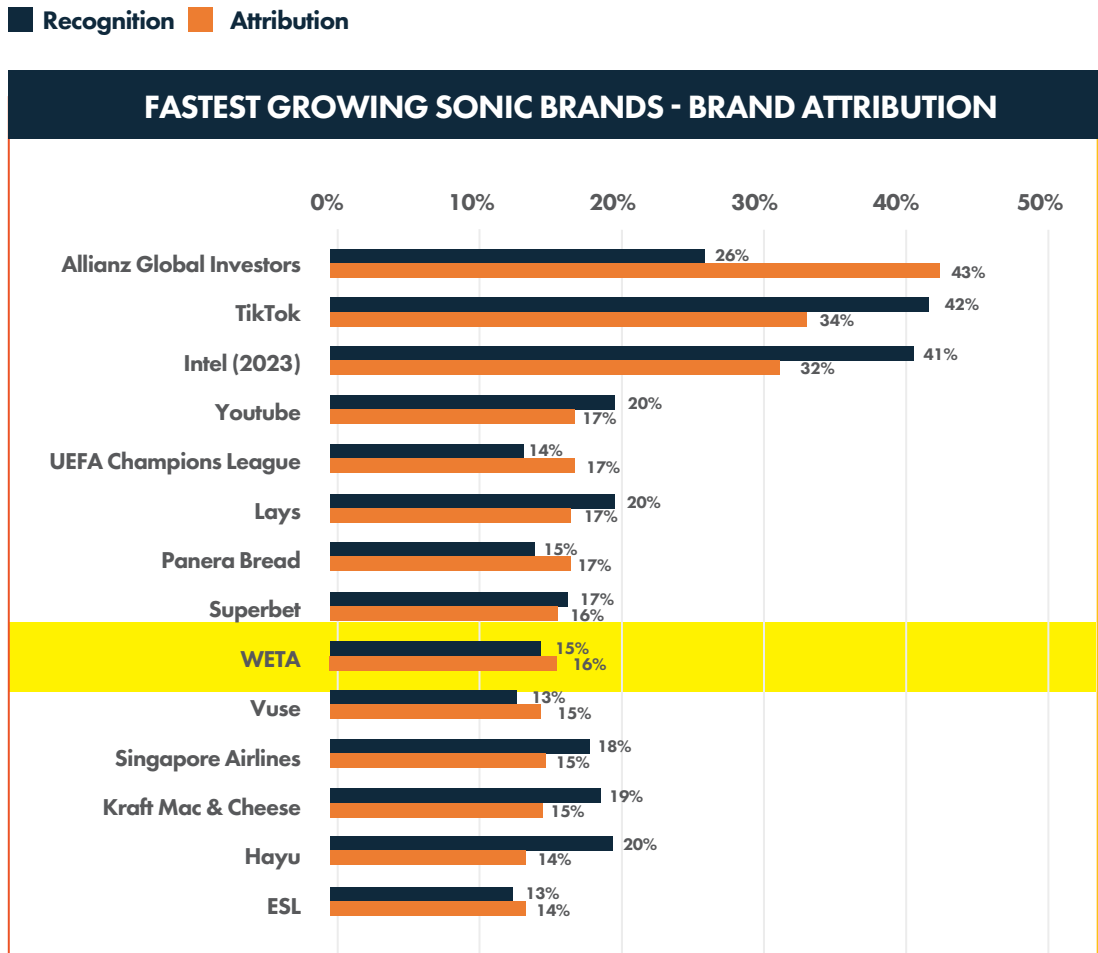




NEW KIDS ON THE BLOCK: THE FASTEST GROWING NEW SONIC BRANDS

For new sonic logos released in the past 2 years, we don't have a completely level playing field as some have been around for almost 24 months while others are only recently launched. But leaving that aside, this is how they are all faring:



Here we have plotted both recognition and attribution, as for some logos the prominence of the brand name means that attribution is easy, even if the consumer has never heard the logo.

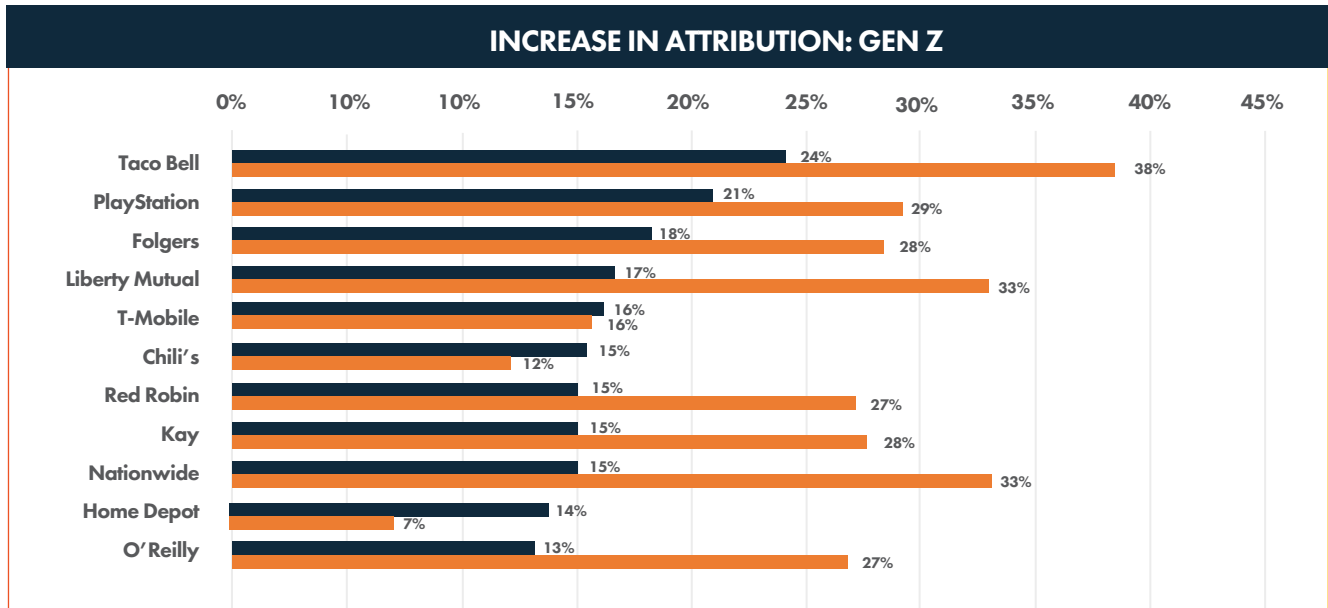
However there is still an opportunity for misattribution—for instance a meaningful number of consumers wrongly attributed the [Pandora](#) (radio) logo to the jewellery retailer. While [Allianz](#) heads the table on attribution this is principally due to the brand name being front and central in the logo.

It is perhaps better to look at the recognition performance as this shows how deeply the new logos have seeped into the public psyche and, on this metric, it's [TikTok](#) that takes the honours – more of that in the following pages. [Intel's](#) updated/tweaked sonic logo is a close second – but it leans heavily on almost 30 years of iconic in market usage.

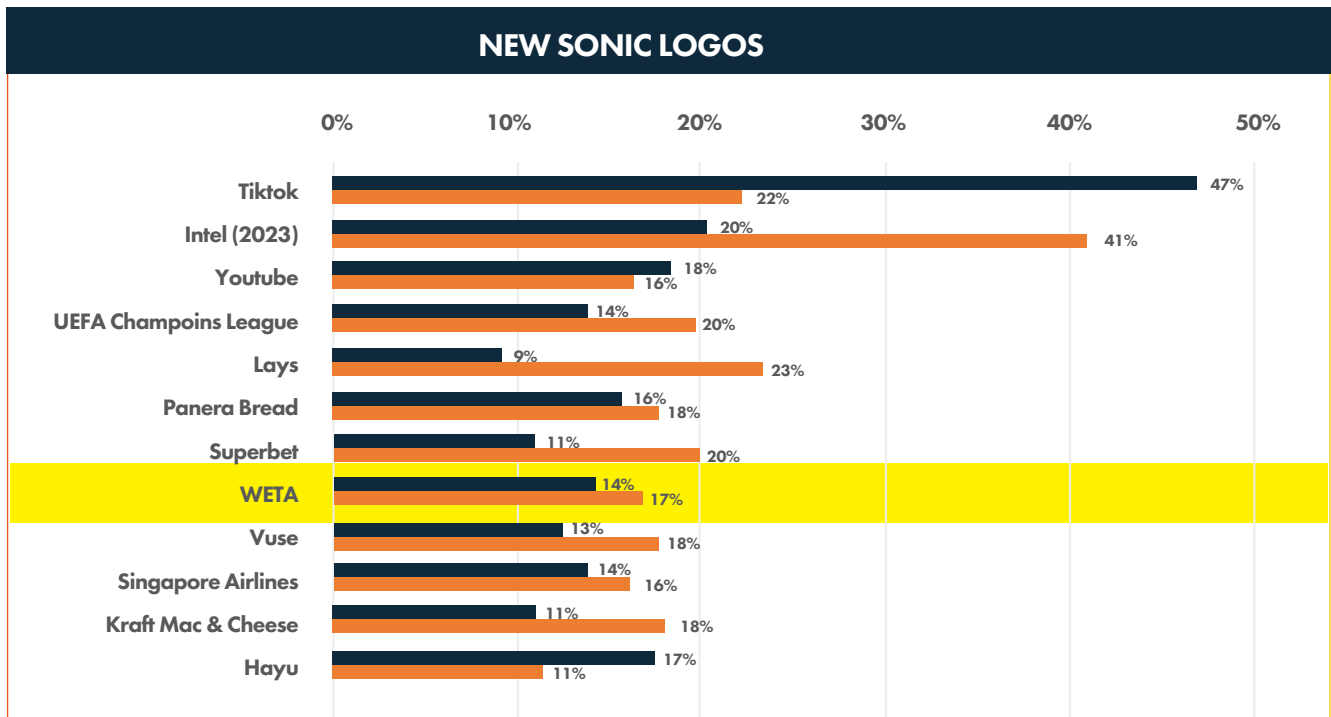
It is also worth noting that for almost all brands, building meaningful recognition and attribution is a marathon not a sprint, for all 27 tested, only 3 break the 20% attribution hurdle. Building a distinctive brand asset takes time, money and persistent marketing and requires a clear strategic focus.

THE GEN Z CHALLENGE

■ Gen Z ■ >25



■ Gen Z ■ >25



The fastest growing sonic brands 2021-2023

Brand	2023 Rank	Increased attribution 2021 - 2023	Gen Z	>25s	Name in logo
Nationwide (piano)	1	75%	72%	78%	No
Allianz Global Investors	2	43%	33%	50%	Yes
TikTok	3	34%	47%	22%	No
Intel (2023)	4	32%	20%	41%	No
Ricola	5	26%	10%	29%	Yes
Taco Bell	6	24%	24%	38%	No
Folgers	7	24%	18%	28%	Yes
PlayStation	8	24%	21%	29%	Yes
Liberty Mutual	9	23%	17%	33%	Yes
Nationwide (vocal)	10	22%	15%	33%	Yes
Red Robin	11	20%	15%	27%	Yes
Kay	12	20%	15%	28%	Yes
Hot Pockets	13	19%	11%	36%	Yes
O'Reilly	14	18%	13%	27%	Yes
Old Spice	15	18%	8%	29%	No
YouTube	16	17%	18%	16%	No
UEFA Champions League	17	17%	14%	20%	Yes
Lays	18	17%	9%	23%	No
Panera Bread	19	17%	16%	18%	No
Chili's	20	17%	15%	12%	Yes
Superbet	21	16%	11%	20%	No
WETA	22	16%	14%	17%	No
Febreze	23	15%	7%	31%	Yes
Vuse	24	15%	13%	18%	Yes
Singapore Airlines	25	15%	14%	16%	No
Kraft Mac & Cheese	26	15%	11%	18%	No
The General	27	14%	7%	22%	Yes
State Farm	28	14%	12%	23%	No
USAA	29	14%	5%	25%	Yes

Overall sonic brand rankings (continued)

Overall attribution	2023 Rank	Change 2021 - 2023	Attribution overall	Attribution Gen Z	Attribution >25s	Name in logo
Hulu Original	59	-9	20%	15%	25%	No
Paramount+	60	-1	19%	25%	14%	No
Tuneln	61	11	19%	14%	22%	Yes
Oreo	62	15	18%	21%	16%	No
Huggies	63	2	17%	20%	15%	No
YouTube	64	NEW	17%	18%	16%	No
UEFA Champions League	65	NEW	17%	14%	20%	Yes
Lays	66	NEW	17%	9%	23%	No
American Express	67	32	17%	12%	22%	No
Panera Bread	68	NEW	17%	16%	18%	No
Aldi	69	35	17%	20%	14%	No
Colgate	70	10	17%	23%	13%	No
Xiaomi	71	-16	17%	14%	19%	Yes
Superbet	72	NEW	16%	11%	20%	No
Sony	73	-20	16%	15%	17%	No
Nintendo Switch	74	-1	16%	21%	12%	No
WETA	75	NEW	16%	14%	17%	No
Nissan	76	-9	16%	22%	11%	No
Vuse	77	NEW	15%	13%	18%	Yes
Clorox	78	20	15%	16%	15%	No
Singapore Airlines	79	-36	15%	14%	16%	No
Kraft Mac & Cheese	80	NEW	15%	11%	18%	No
Finastra	81	2	15%	17%	13%	No
USA Today	82	4	15%	13%	16%	No
Deloitte	83	-25	15%	17%	13%	No
Mastercard	84	12	14%	17%	12%	No
TCL	85	16	14%	21%	8%	No
Ethiad	86	22	14%	21%	11%	No
Visa	87	13	14%	18%	9%	No