



HOW CAN BRANDS BRIDGE THE GENERATION DIVIDE?

BRAND ALPHA IS OUR MEASURING STICK

- A **quantitative measure** of a brand's authenticity
- National sample of **3,150 Kiwis 16+**
- **55 brands** measured
- **>450 respondents** per brand
- In field **21st – 23rd March 2019**



FOUR AUTHENTICITY DRIVERS

VISIBILITY

Does the brand have
iconic presence?

VITALITY

Does the brand deliver a vibrant
and memorable experience?

VALUE

Does the brand deliver value
that's hard to live without?

VIRTUE

Does the brand have a purpose
beyond just making money?

VISIBILITY

VITALITY

VALUE

VIRTUE

POWER IN THE MARKET

POWER IN THE MIND

BRAND ALPHA IS THE SUM OF THESE 'BEYOND EXPECTED SCORE' MEANINGS

VIRTUE

VALUE

ba
BRAND ALPHA

VISIBILITY

VITALITY

NEW ZEALAND'S MOST AUTHENTIC BRANDS

2018

TESLA

ecostore


icebreaker®


LEWIS ROAD CREAMERY
New Zealand

Whittaker's
SINCE 1956

 airbnb


AIR NEW ZEALAND

Uber

thewarehouse //


I&P
SINCE 1956

NEW ZEALAND'S MOST AUTHENTIC BRANDS

2019

ecostore



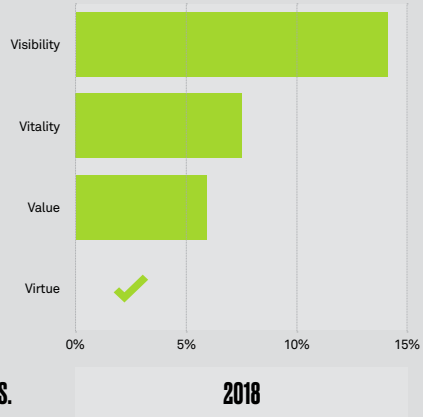
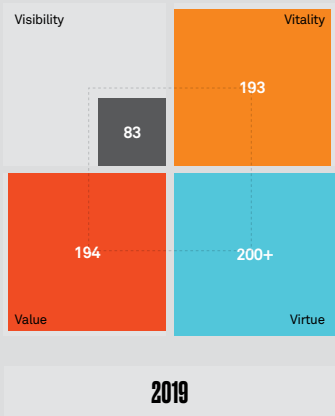
TESLA



Uber

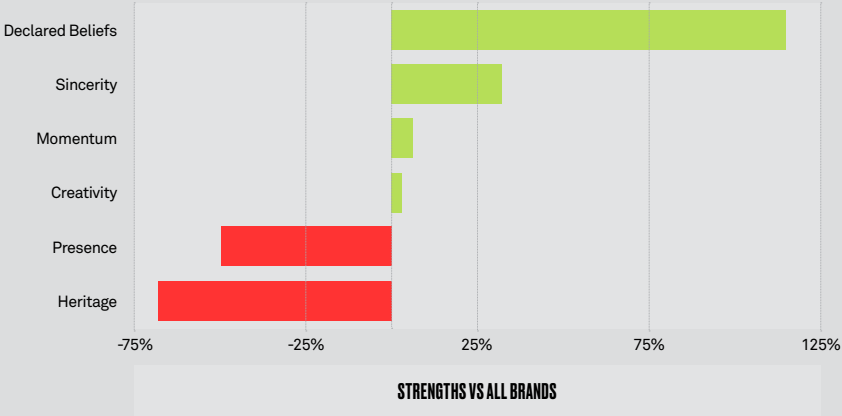


ECO STORE COMES OF AGE

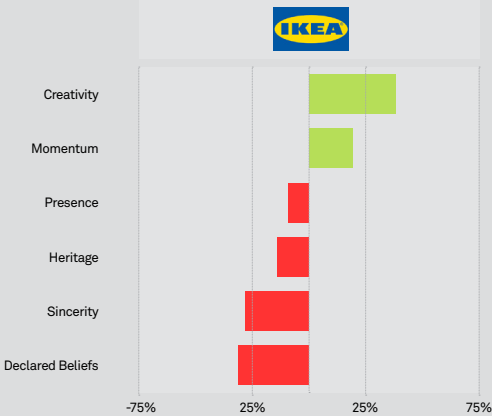
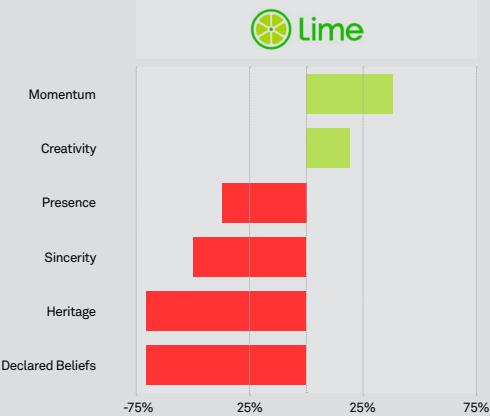


VS.

ECO STORE IS BUILDING UPON A SINCERE BELIEF SYSTEM

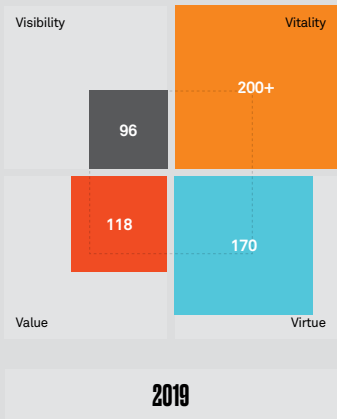


LIME & IKEA ARE CUTTING THROUGH AS FRESH THINKING BRANDS

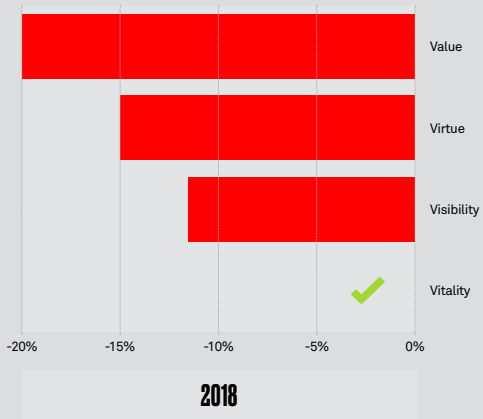


STRENGTHS VS ALL BRANDS

TESLA TAKES A SKID



VS.



THE TOP 20 IN 2019

ecostore



TESLA



Uber



thewarehouse //



MITRE 10



amazon



13/20 HOMEGROWN BRANDS

ecostore



TESLA



Uber



thewarehouse //



MITRE 10



amazon

Kiwi bank.



6/7 GLOBAL BRANDS ARE TECH BASED

ecostore



TESLA



Uber



thewarehouse //



MITRE 10

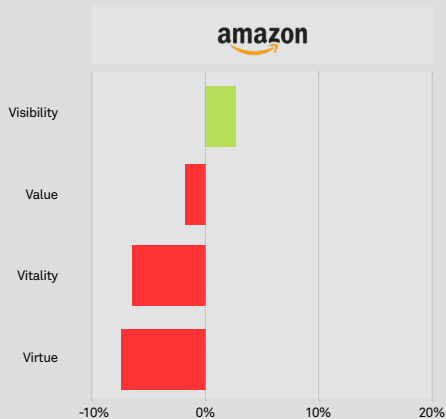
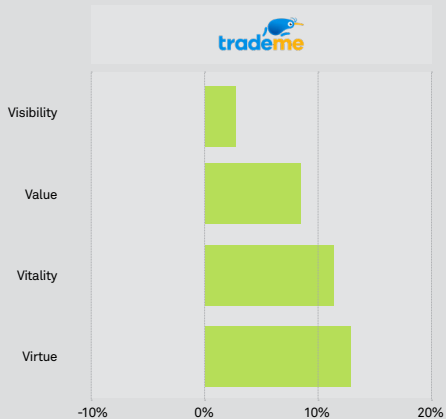


amazon

Kiwi bank.

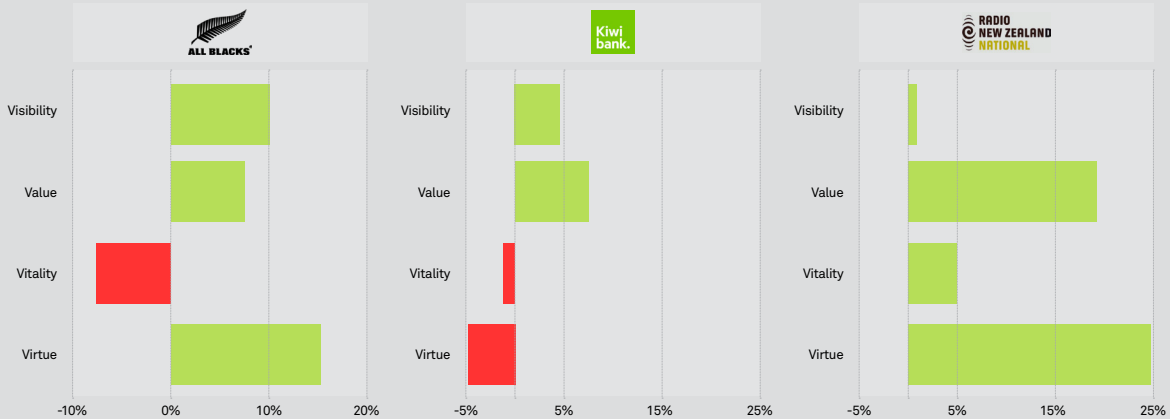


TRADE ME CONSOLIDATES ITS LOCAL LEAD



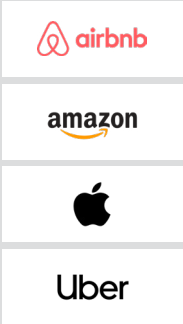
2019 vs 2018

HERITAGE BRANDS RISE AGAIN

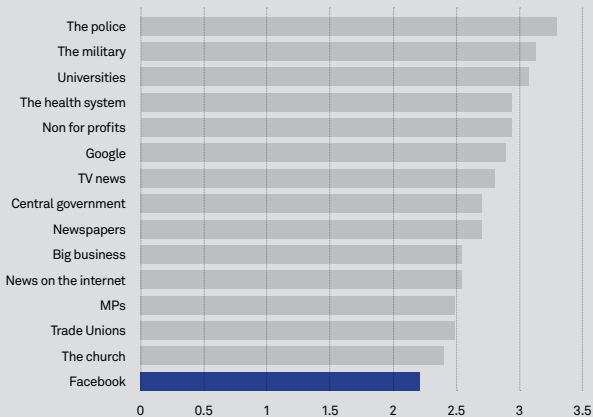


2019 vs 2018

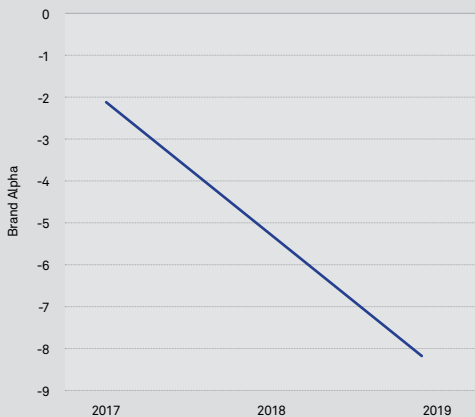
BIG TECH NORMALISES



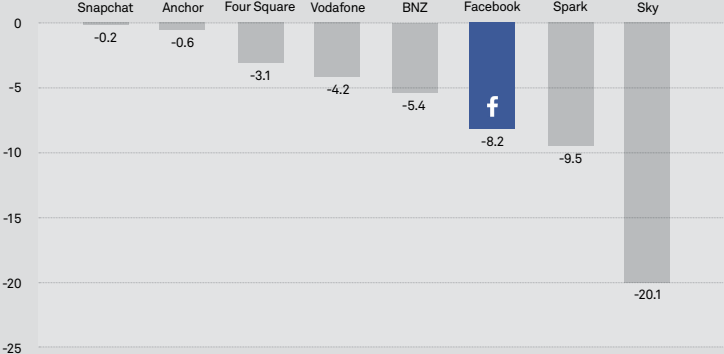
CONFIDENCE IN...



BRAND ALPHA...

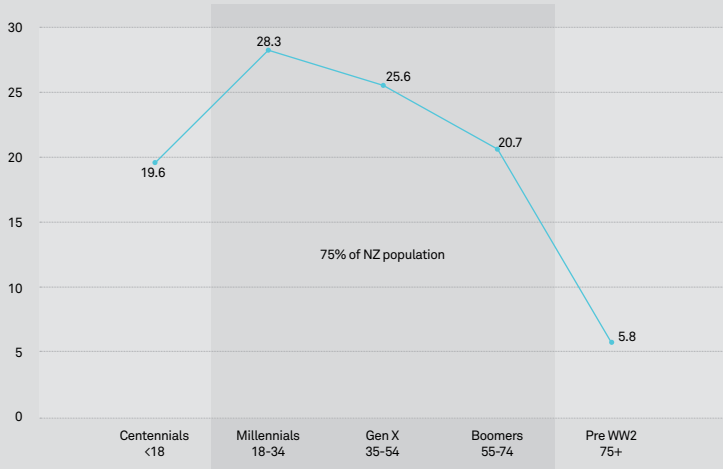


THE BACK OF THE PACK





THE
GENERATIONAL
VIEW



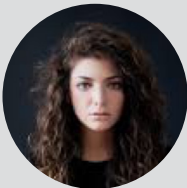
PUTTING FACES TO NAMES

CENTENNIALS



Julian Dennison, 16

MILLENNIALS



Lorde, 22

GEN X



Bret, 42 & Jemaine, 45

BOOMERS



Jools & Lynda, 61

PRE WW2

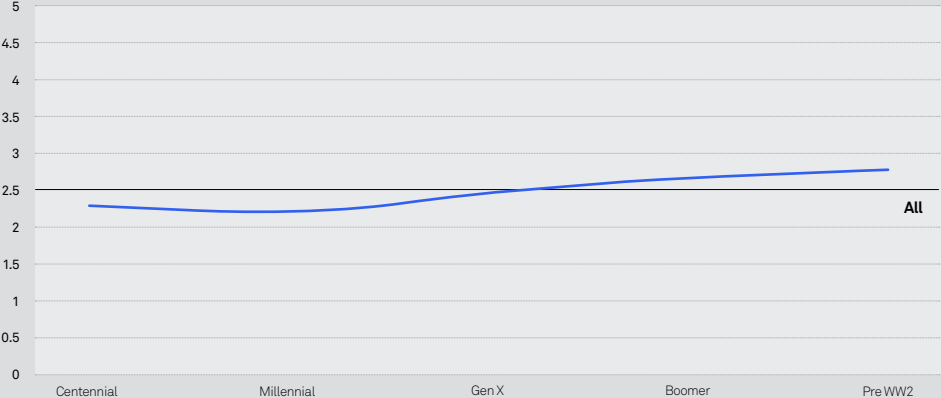


Kiri, 75



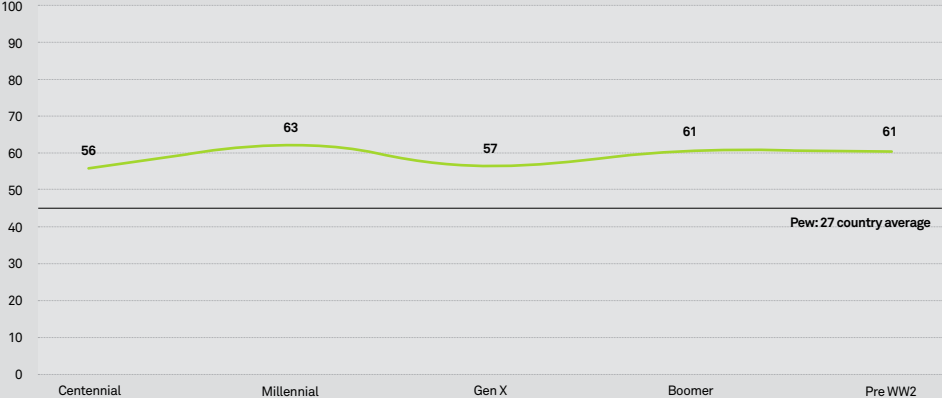
**WHAT ARE THE
THINGS THAT
UNITE US?**

AT TIMES THE FUTURE FEELS UNCERTAIN TO ME



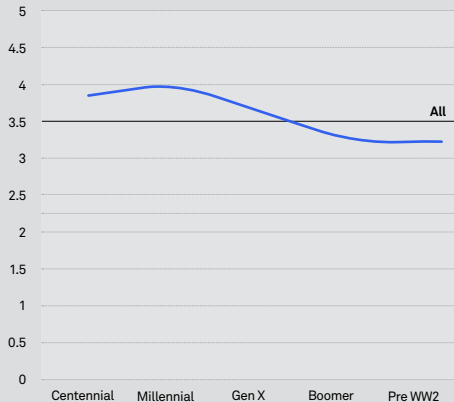
REVERSED SCALE

HOW SATISFIED ARE YOU WITH HOW DEMOCRACY IS WORKING IN NZ?

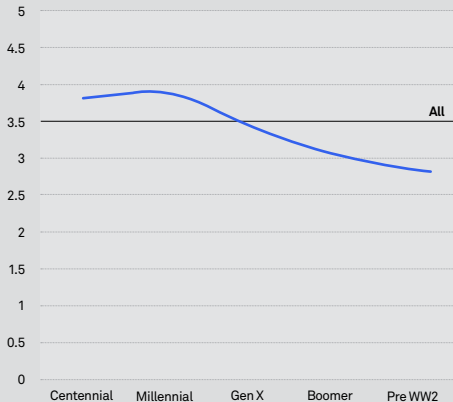


Very or somewhat satisfied

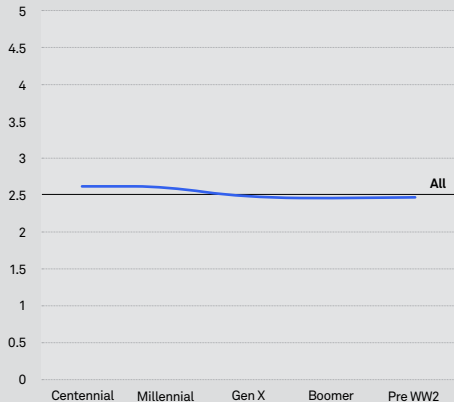
MOST PEOPLE OF MY GENERATION ARE MATERIALISTIC



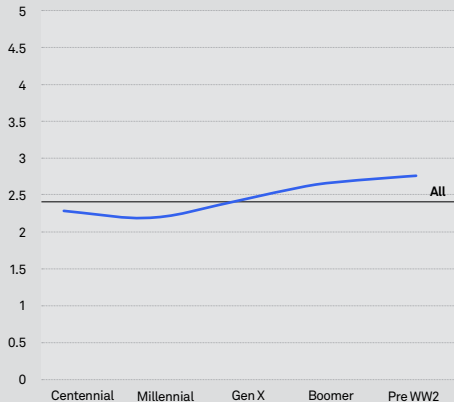
MOST PEOPLE OF MY GENERATION ARE COMFORTABLE WITH GENDER DIVERSITY



CONFIDENCE IN BIG BUSINESS



MANY BRANDS FAIL TO LIVE UP TO THEIR PROMISES



WE ARE ALL...

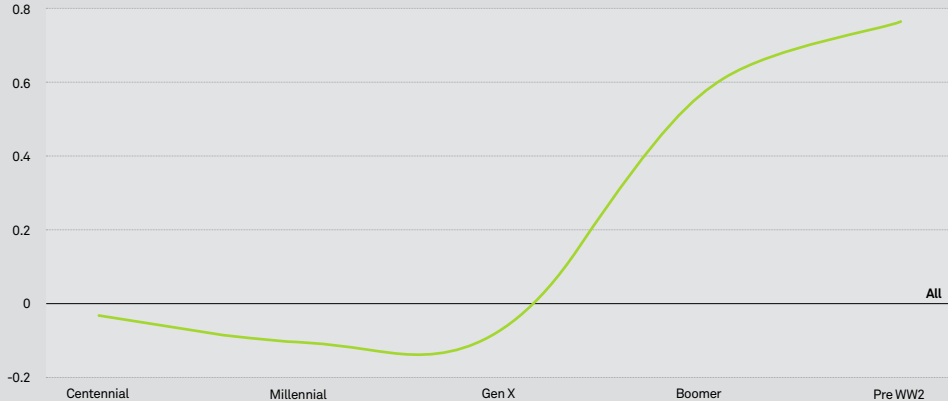
- conscious of living in volatile times
- enduring believers in democracy
- equally materialistic
- increasingly comfortable with gender diversity
- sceptical of big business and brand hyperbole



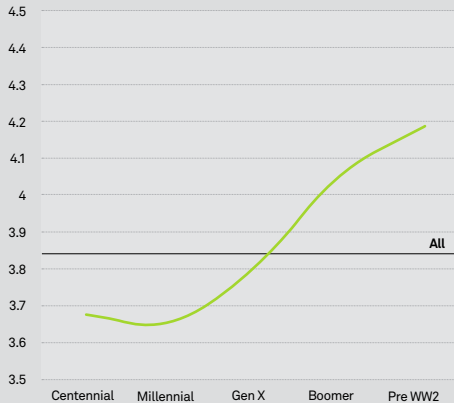
ON WHAT FACTORS DO GENERATIONS DIFFER?



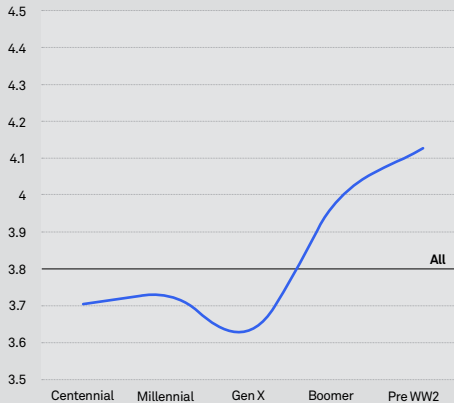
THE GENERATIONS DIVERGE ON POSITIVITY



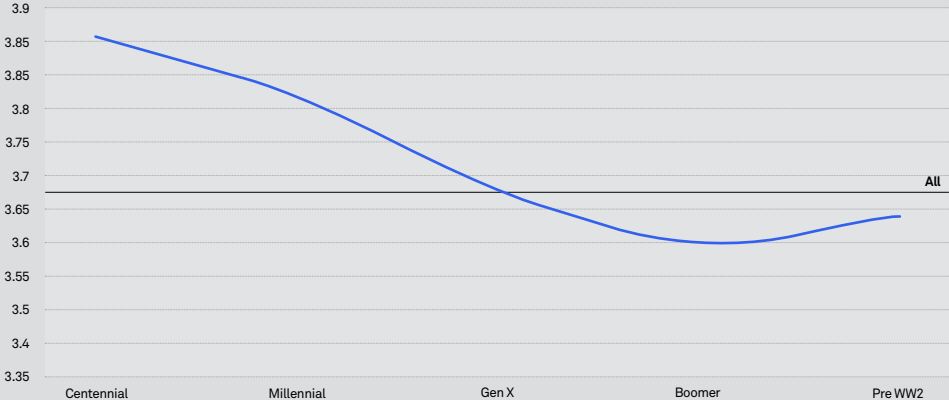
I GENERALLY FEEL CONFIDENT IN MYSELF



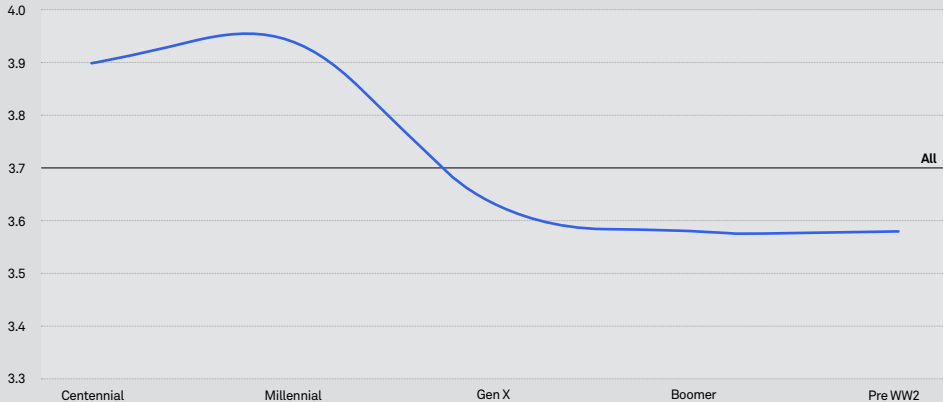
I GENERALLY FEEL SATISFIED WITH MY LIFE



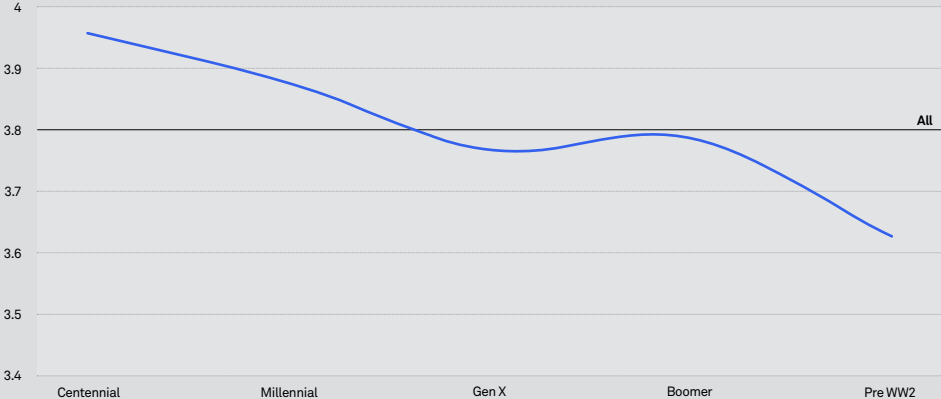
MOST PEOPLE OF MY GENERATION ARE **WORRIED ABOUT THE EFFECTS OF CLIMATE CHANGE**



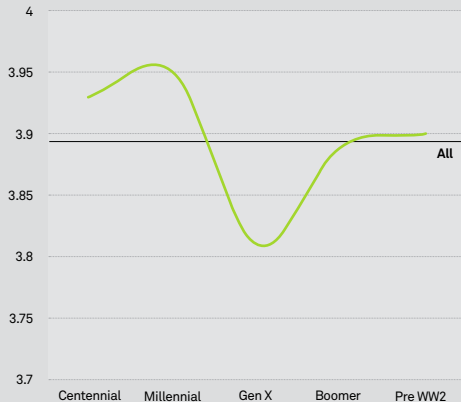
MOST PEOPLE OF MY GENERATION CARE ABOUT SOCIAL INCLUSION AND TOLERANCE



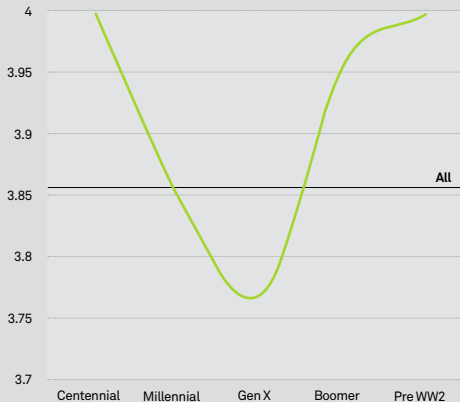
FAKE NEWS IS ALIVE AND WELL IN NZ



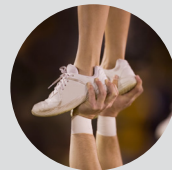
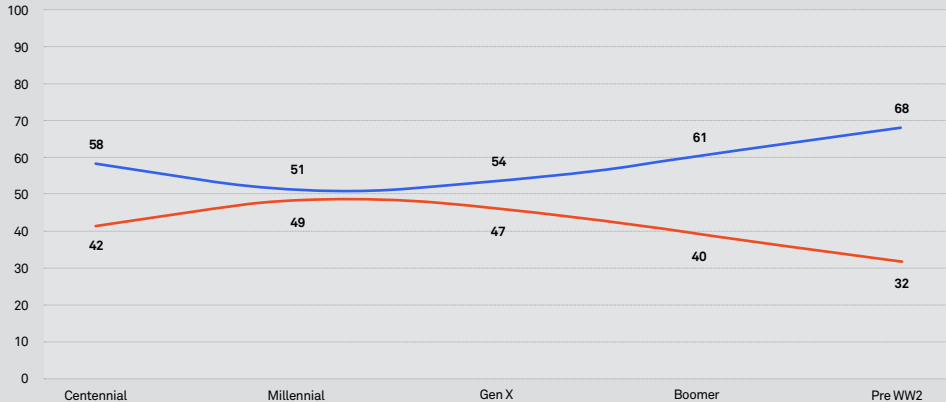
I LOOK TO THE FUTURE WITH HOPE AND ENTHUSIASM



OTHERS ARE GENERALLY HERE FOR ME WHEN I NEED THEM



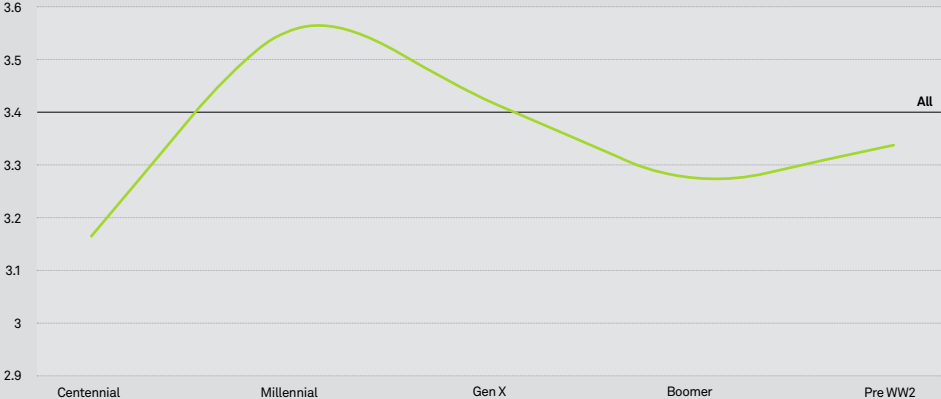
TRUST IN OTHERS



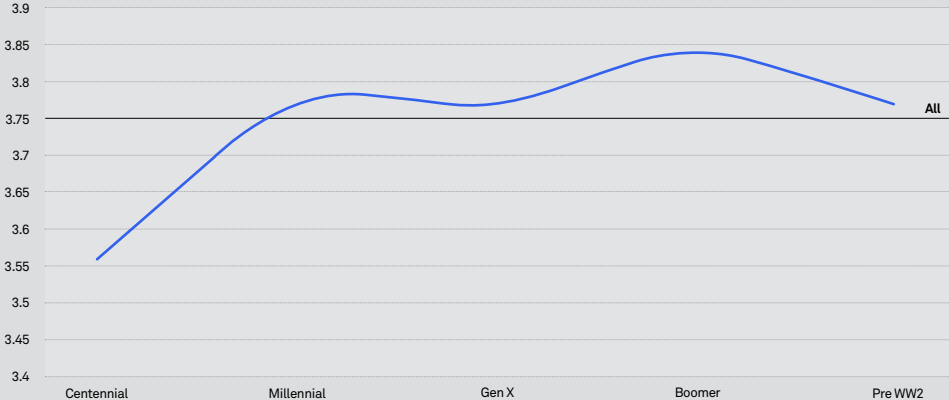
Most people can be trusted

You can't be too careful
in dealing with people

TECHNOLOGY MAKES IT MORE DIFFICULT TO RELAX AND UNWIND



SOCIAL MEDIA IS MAKING PEOPLE **LESS TOLERANT OF ONE ANOTHER**



GENERATIONAL DIVIDES

- Older generations are more positive and more trusting of others than today's younger generations.
- Gen X, current 35-54 year olds, are at the lowest ebb, battling hard to get ahead and yearn for more practical and emotional support.
- While young Kiwis look to the future with hope and enthusiasm their always-connected lifestyles fuel anxiety about fake news, climate change and social inclusion.
- Centennials and Millennials express a willingness to 'vote with their wallets' on the social issues that stir them.

MOST AUTHENTIC BRANDS BY GENERATION

GENTENNIALS



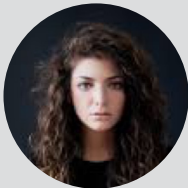
Julian Dennison, 16

TESLA

airbnb

lululemon

MILLENNIALS



Lorde, 22

ecostore

lime

TESLA

GEN X



Bret, 42 & Jemaine, 45

ecostore

LEWIS ROAD CREAMERY
New Zealand

IKEA

BOOMERS



Jools & Lynda, 61

icebreaker

ecostore

Whittaker's
SINCE 1894

PRE WW2



Kiri, 75

thewarehouse

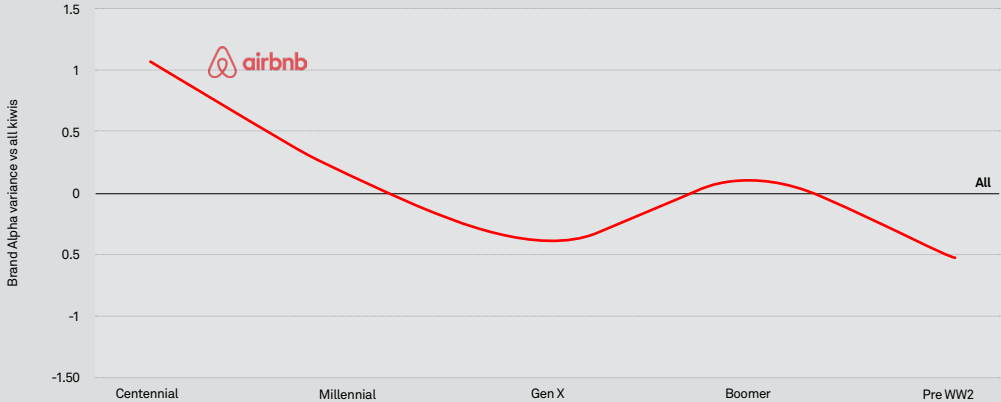
Whittaker's
SINCE 1894

AIR NEW ZEALAND

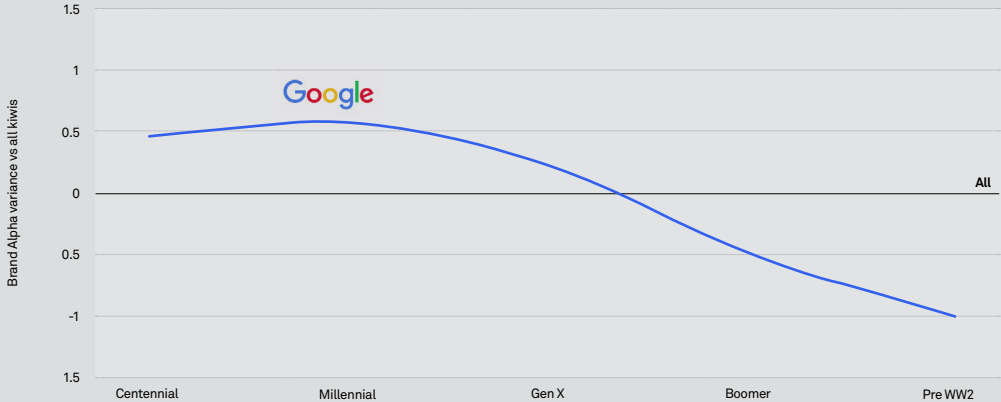
More focused on brand meaning and motives beyond just making money

More focused on in-category originality and genuineness of personality

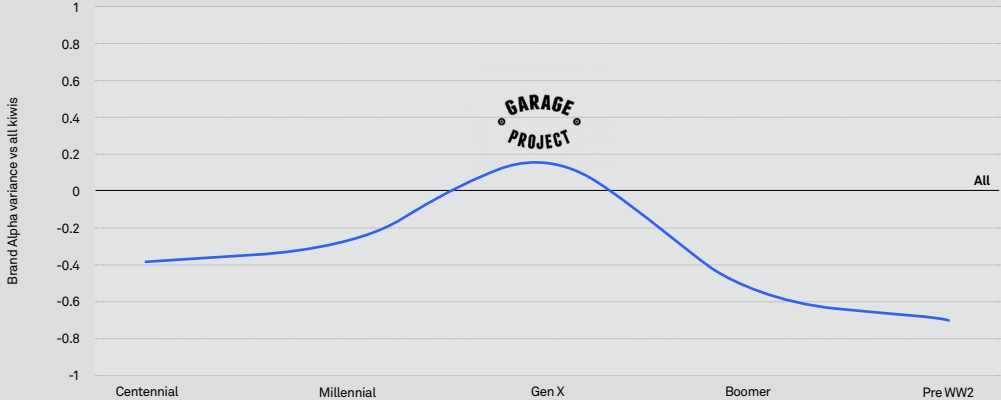
STRONGEST WITH CENTENNIALS



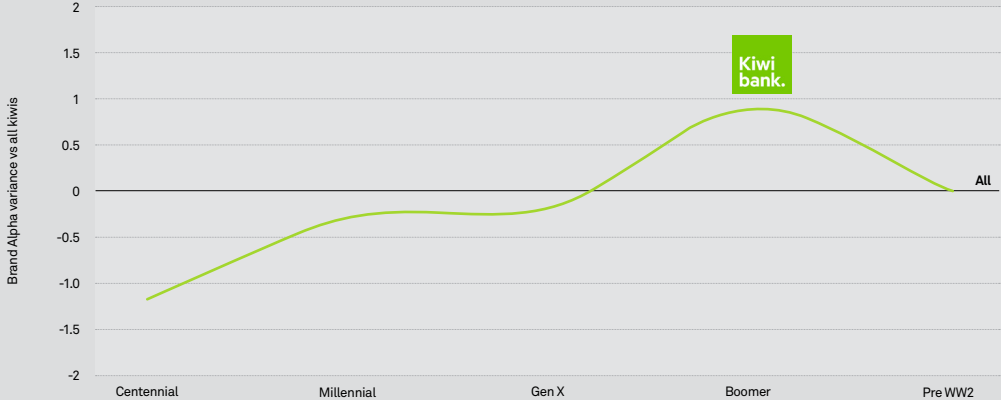
STRONGEST WITH MILLENNIALS



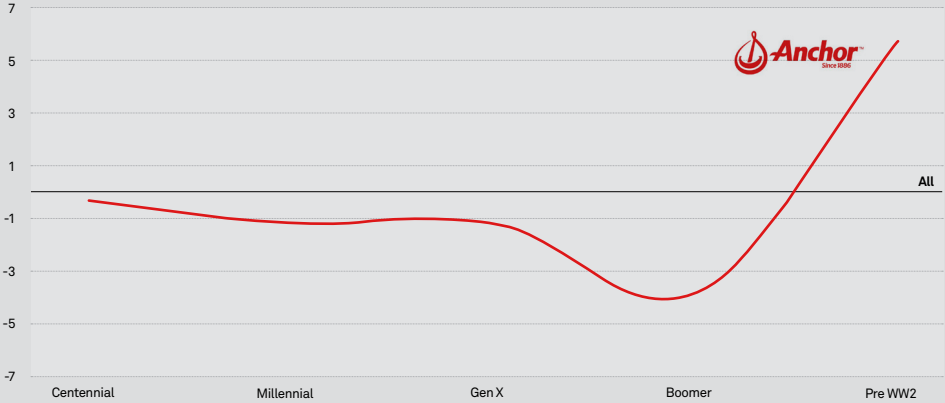
STRONGEST WITH GEN X



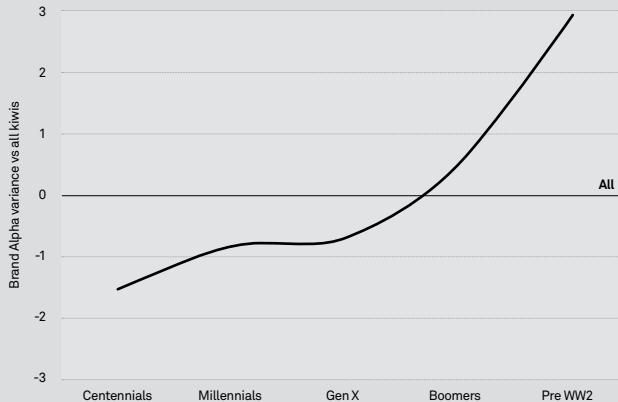
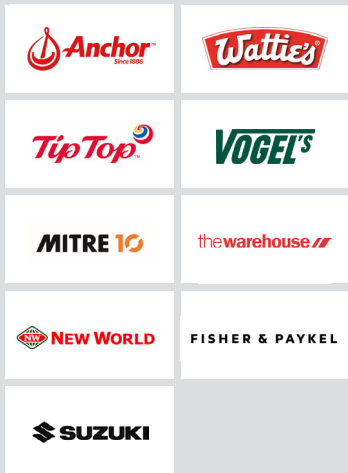
STRONGEST WITH BOOMERS



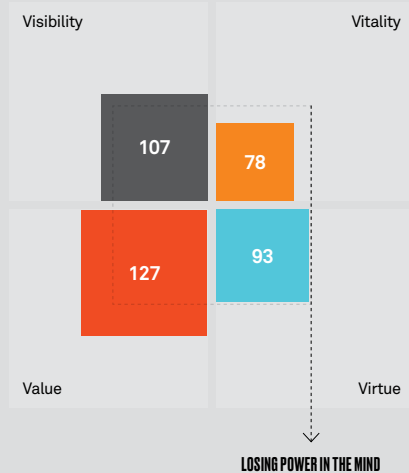
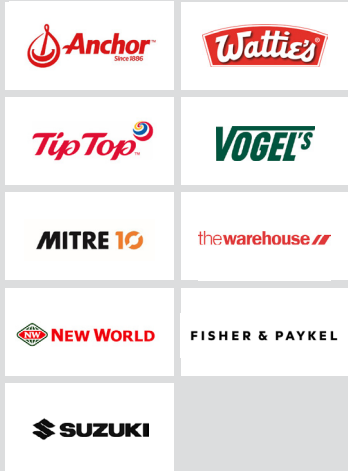
STRONGEST WITH PRE-WW2



MANY BRANDS ARE NEXT-GEN CHALLENGED



MANY BRANDS ARE NEXT-GEN CHALLENGED



CENTENNIALS **RETHINK** INDULGENCE

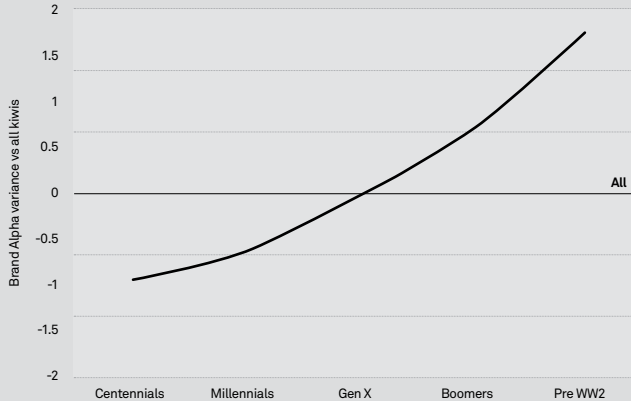


McDonald's

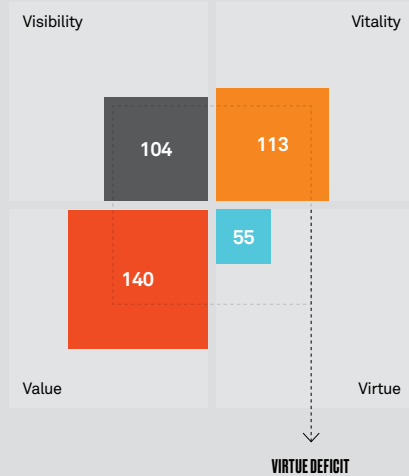
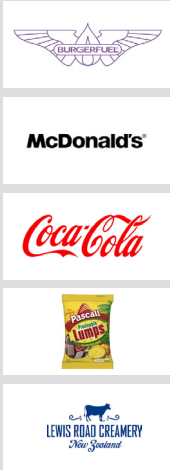
Coca-Cola



LEWIS ROAD CREAMERY
New Zealand



CENTENNIALS **RETHINK** INDULGENCE



VIEWS OF CENTENNIALS

TRANSCENDING GENERATIONS

Whittaker's
SINCE 1924

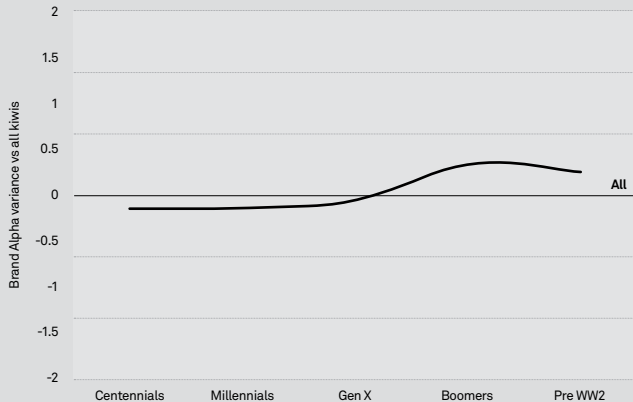
AIR NEW ZEALAND



trademe

amazon

Uber



TRANSCENDENT BRANDS

Whittaker's
SINCE 1858

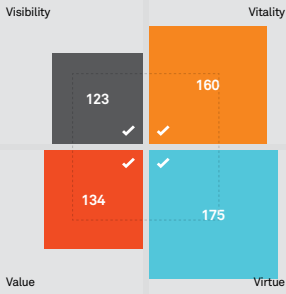
AIR NEW ZEALAND

trademe

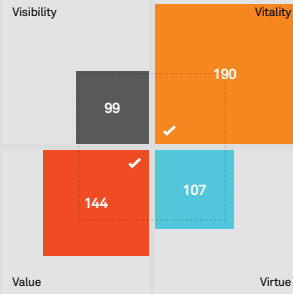
amazon



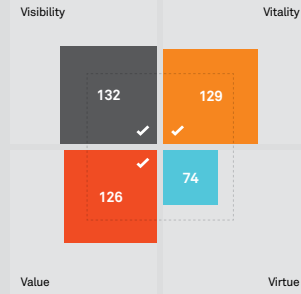
Uber



AMAZING ALL-ROUNDERS



COLOURFUL UTILITIES



CATEGORY ICONS

THE MOST AUTHENTIC BRANDS COMBINE

- Purpose
- Personality
- A commitment to continuously reshape value
- Delivered through beautifully designed customer experiences
- Brands that build loyalty, across generations, sustain their brand's core meaning and personality, expressed through ever-evolving products and services and initiatives that demonstrate they care about more than just making money.

THANK YOU