

# Brand Essentials

Q2 2024

Honey



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# Background

- Brand Essentials is a syndicated consumer market research project which explores the 'soft' drivers of preference that enable brands to:
  - Build a more loyal customer base
  - More easily launch new variants
  - Command a price premium
  - Withstand pressure to discount
  - Reinforce trade partnerships
- 9 categories covered in 2024
- Methodology: Online survey
- 350 adults, 18-64 years, representative of general population.
- Charts in this report are based on sub-samples of respective *category users*.
- All data owned by Scale NZ

- Question Coverage:
  - Category dynamics (usage, retention, repertoire)
  - Brand performance (awareness, usage, consideration, indicative market share)
  - Brand equity and imagery (perceptions of price, availability, uniqueness, relevance, affinity & quality) and
  - Shopping behaviour (consideration factors and retail outlets used when buying the category)

| Category | Sample Size of Category users | Accuracy |
|----------|-------------------------------|----------|
| Honey    | 288                           | ± 5.9%   |

# Using the Dashboard



Brand Essence

Equity: Single measure of brand strength

Period: Q2 2024

Category usage: indicators of consumer engagement at highest level

Prepared for Nice & Natural



Each brand has its own story

Brand funnel: Awareness-Trial-Usage

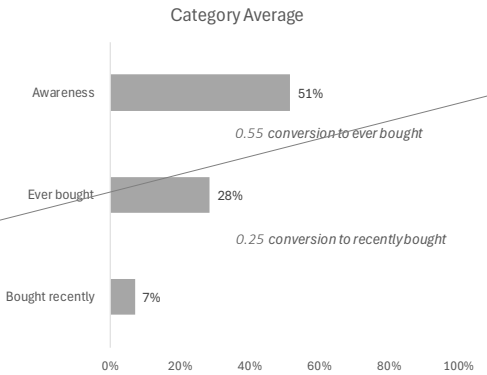
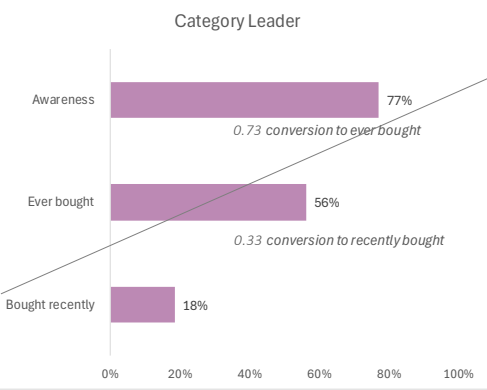
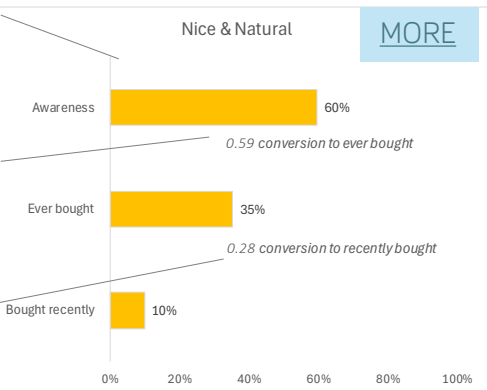
Conversion to Trial: Concept appeal, Availability

Conversion to Regular Use: Pricing, Quality, Availability

Performance Gap: What is driving a brand's sales vs. how well they are perceived on those drivers. Priorities for improvement, regardless of brand size.

Indicative Share: This will soon be calibrated with Circana's retail scanner data

Brand Funnels

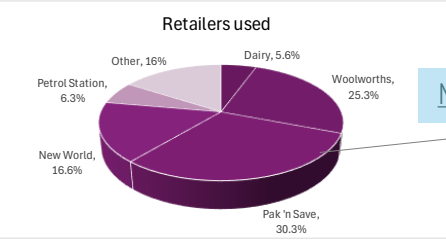


Brand Equity

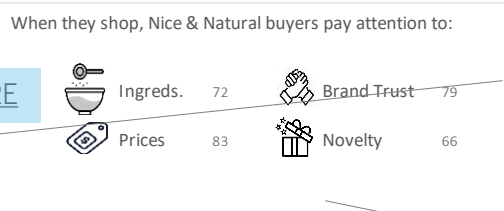
|                             |            |
|-----------------------------|------------|
| Category Trial Rate         | 95%        |
| Recent Usage                | 85%        |
| Retention                   | 0.89       |
| Categ. Experience           | 3.4 brands |
| <b>Brand Equity Summary</b> |            |
| Nice & Natural              | 6.2        |
| Categ. Leader               | 8.5        |
| Categ.Avg.                  | 6.4        |

MORE

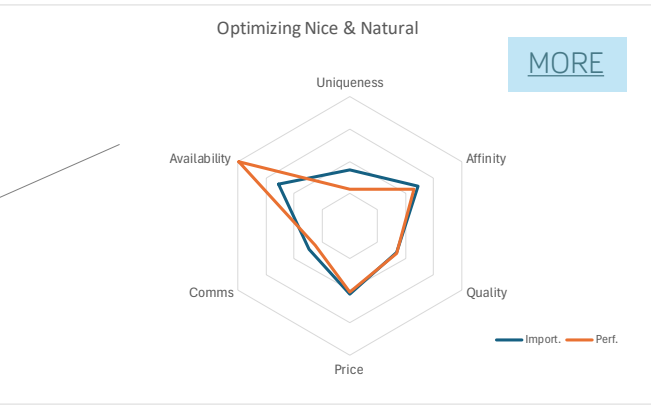
Shopping Behaviour



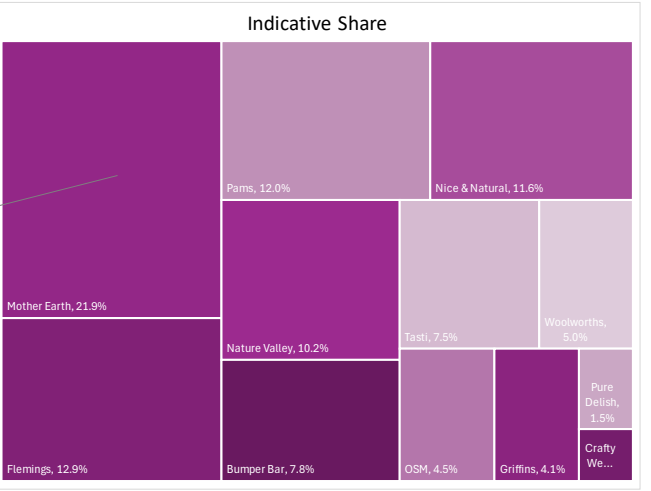
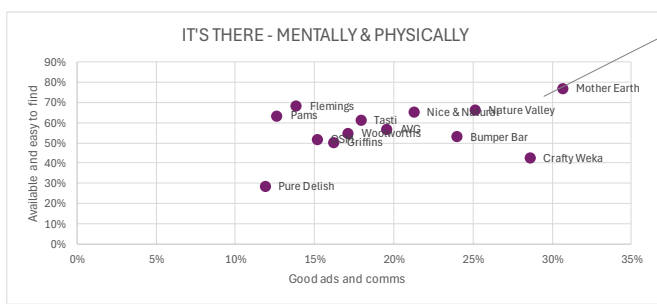
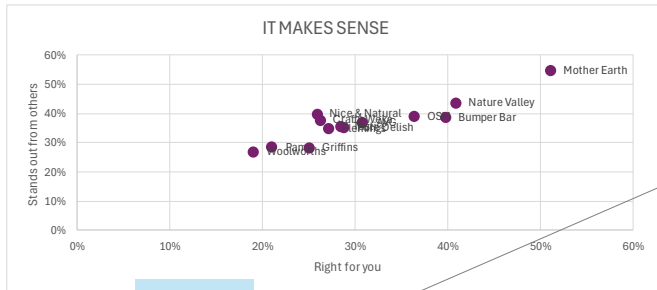
MORE



Perceptions of Brands (among those aware)



MORE



Retail outlets used when shopping for the category

What different brand buyers say they want.

Perceptual maps: Show absolute strength of perceptions on six attributes, bucketed as Relevance, Value and Access, each of which have important impact on trial and loyalty.

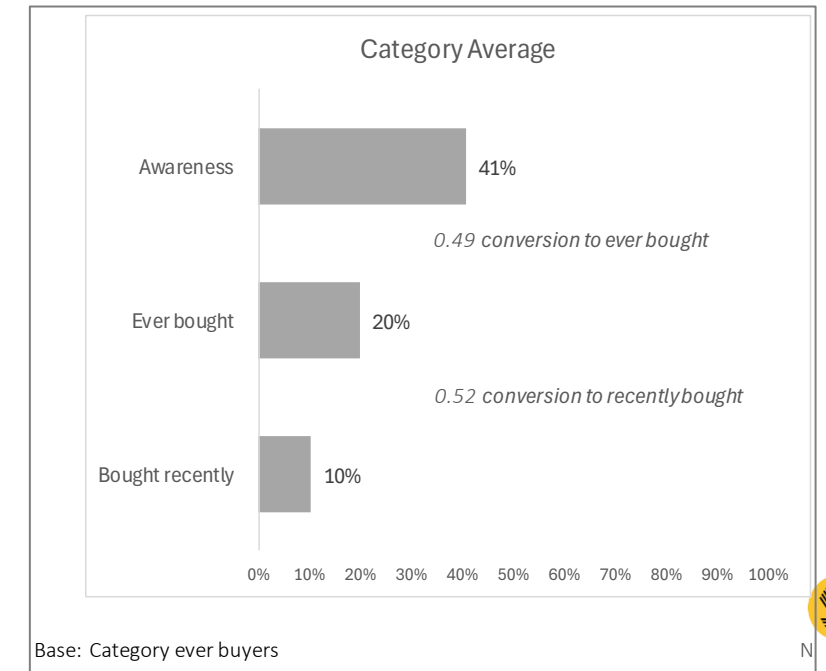
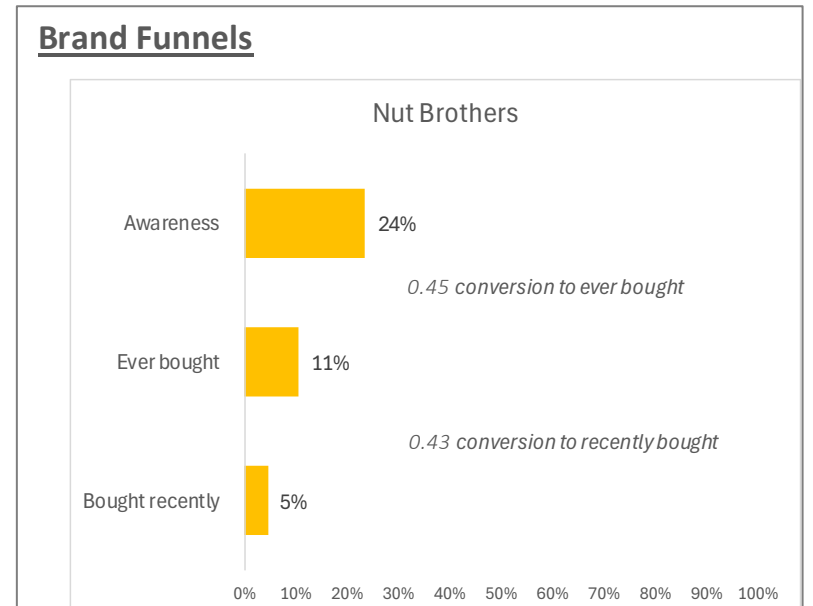
Clusters of brands show who the closest competitors are.





# Brand Funnel

- The data
  - Awareness – aided by illustrated list of brands in random order
  - Ever Bought – filtered by aware brands
  - Bought Recently – filtered by brand ever bought
- Ratios
  - Conversion from Awareness to Ever Bought (max. 1.0)
    - Among those who know of the brand, what proportion have tried it (bought it at least once).
    - Along with other metrics, a low on this score may indicate:
      - Low conceptual appeal (ref. also to Relevance).
      - Possibly packaging issues or lack of presence in-store (ref. Availability and retail data)
  - Conversion from Ever Bought to Bought Recently (max. 1.0)
    - Among those who've ever bought it, what proportion have done so recently
    - Along with other metrics, a low on this score may indicate:
      - Regular price point is high (respondent only bought on promo). Ref. also to Price perception and retail data.
      - Issues with find-ability in store (ref. Availability perceptions)
      - Quality issues / did not deliver on expectations (ref. Quality perceptions)
- Comparisons
  - For small brands – compare with Category Average
  - For bigger brands – compare with a market leader or nearest competitor
  - Any difference of 5 points or more could be of interest (*Stat tested data tables* available on request).
- Using this example (Peanut Butter)
  - Nut Brothers' Awareness of 24% is low compared to category average 41%. If the brand has been around for a few years (check others in the category) *and* store penetration is satisfactory, this most likely means they have insufficient or poor quality comms.
  - 0.45 conversion to ever bought is normal compared to category. Note the leader is 0.65, so potentially this brand *could* get many more trialists. How many more? Scale NZ can answer this with *Uplift Modelling*, available on request.
  - 0.43 conversion to Recently Bought is well below average and suggests the brand has problems with pricing, in-store placement or quality. Equity measures (see below) help clarify this.



# Equity Measures

- Category trial rate – percentage of respondents who have ever bought any of the brands
  - This is 100% among an 'Ever Users' filtered sample. See [Background](#) info for the trial rate among general population.
- Recent usage – percentage of trialists who have bought recently
  - There may be normal seasonal fluctuations for some categories
- Repertoire size – average number of brands recently bought. Additional analysis of **Brand Cross-Purchase** is available on request.
- Equity – the average indexed score for the brand across all six equity dimensions. This is a measure of brand strength, *not* adjusted for awareness – big brands will do better than small ones.
  - Hence, look at the *equity score relative to awareness* for own brand and market average. Is it proportionally higher or lower?
  - Relevant comparison – category average for small brands. Market leader for big brands.
- Using this example (Kombucha)
  - Happy Hour's equity score is well below the category average; the brand may have some serious issues to deal with, but may also have some unique strengths (ref. to spider webs).
  - Notably, the equity score for the category leader is dramatically higher than the average. This indicates that kombucha is a category that is dominated by few brands and populated with a long tail of – probably - struggling small players.

## Category Health

|                     |            |
|---------------------|------------|
| Category Trial Rate | 100%       |
| Recent Usage        | 80%        |
| Retention           | 0.80       |
| Repertoire size     | 1.7 brands |

## **Brand Equities**

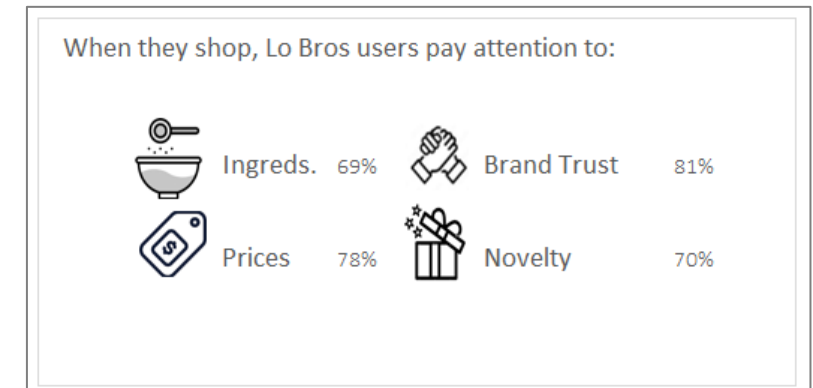
|               |      |
|---------------|------|
| Happy Hour    | 4.1  |
| Categ. Leader | 18.9 |
| Categ.Avg.    | 6.1  |

# Shopping Behaviour

- Retailers used – based on all ever buyers of the category
  - Retailers used based on buyers of each brand are in the [appendix](#).
- What they pay attention to
  - Most buyers care about many things. It's useful to look at the *variance* between brands.
- Using this example (Kombucha)
  - For comparison, Good Buzz and, a larger brand, Lo Bros.
  - Buyers of both brands are seeking much the same thing, except for an important difference in attention to Ingredients.
  - Good Buzz should be able to leverage this to differentiate and eke out a higher price point.



- But will Good Buzz's positioning be secure in a category where scale matters so much? Lo Bros are better resourced and have strength in the Ads & Comms (see spider charts). How vulnerable would Good Buzz's buyers be to an 'ingredients' message from Lo Bros?
- Scale NZ's **Brand Switch Analysis** quantifies loyalty and brand switching behaviour.





# Brand Perceptions

- Perceptions of brands (among those aware of them, but not adjusted for brand size) based on six equity dimensions:

## It Makes Sense

1. Stands out from others (Uniqueness)
2. Right for you (Relevance)

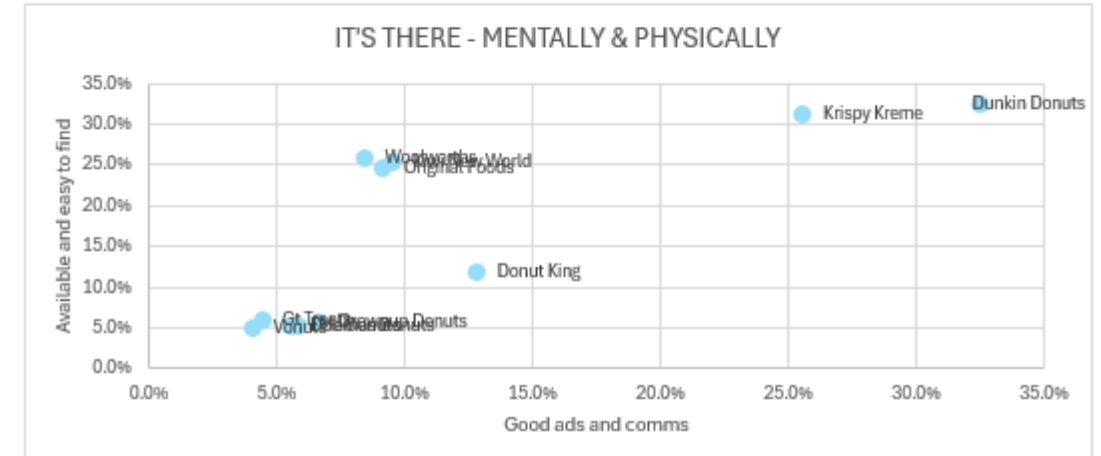
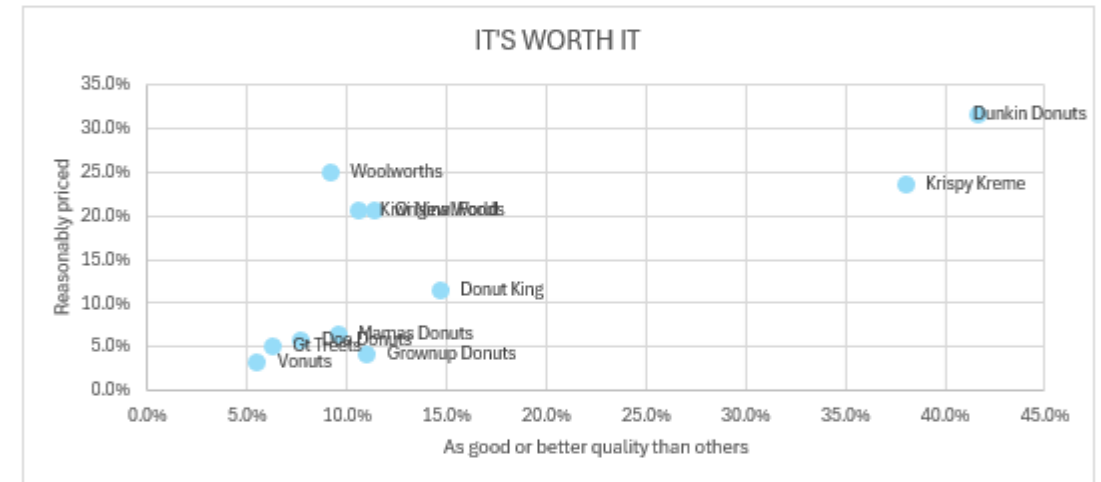
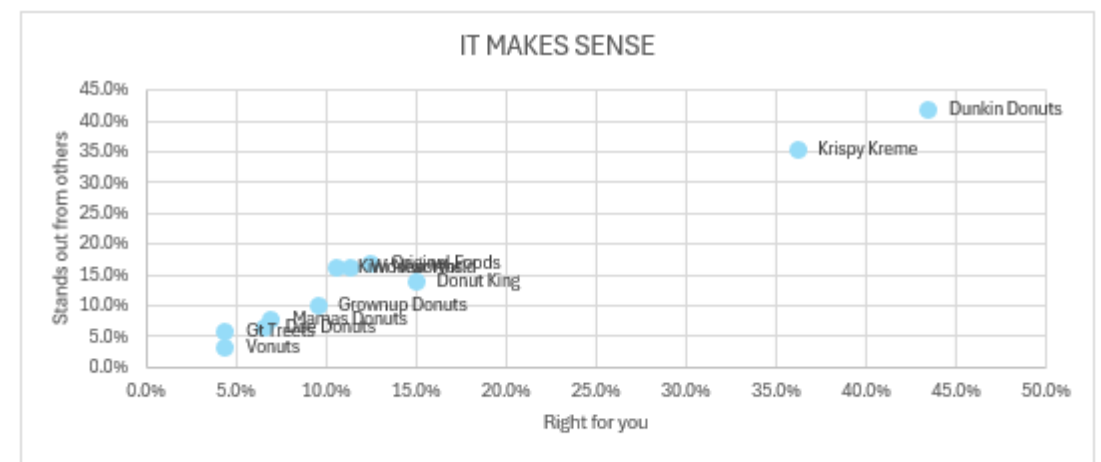
## It's Worth It

3. Reasonably Priced
4. As good or better quality than others

## It's There

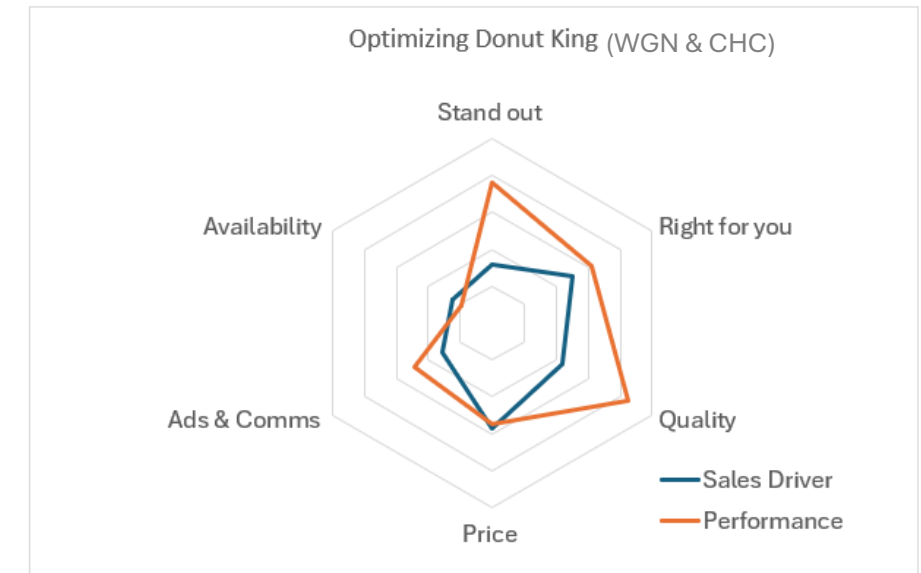
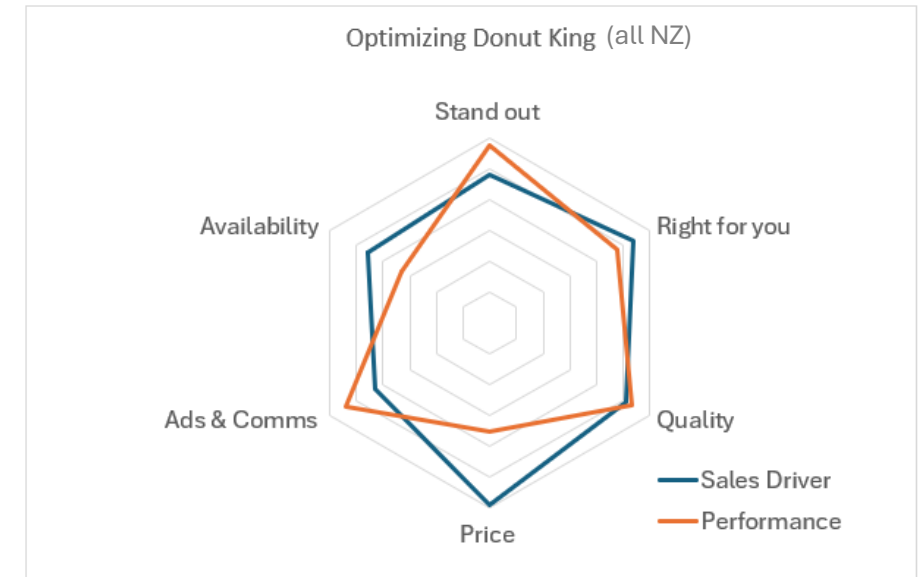
5. Available and easy to find
6. Good ads and communications

- Look for clustering – horizontally and vertically,
  - eg. Kiwi New World, Original Foods and Grownup, are all perceived as similar in Quality.
  - But Grownup stands out as much less reasonably priced
- Using this example (Donuts)
  - This is quite a neatly sectioned category. It is dominated in NZ by two global brands, with the budget brands seen as tightly competitive and a pack of high-priced, niche, city-constrained, brands all struggling to distribute a very perishable product.
  - Donut King stands out. Although not a dominant brand, it occupies its own 'white space' – it has no consistently close rivals; and could use this to relatively easily move further away from the pack.
  - Since DK has only a handful of outlets, 'Availability, it's not surprising to see a yawning gap between it and the next set of players.
  - DK's spider web chart addresses whether or not Availability is a burning priority for the brand.



# Optimizing the brand – not ‘one size fits all’

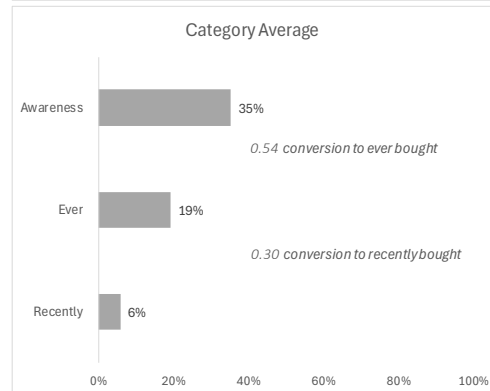
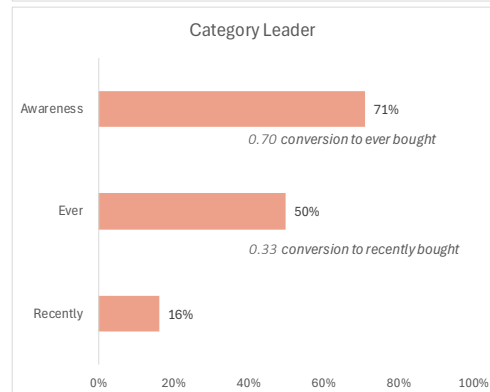
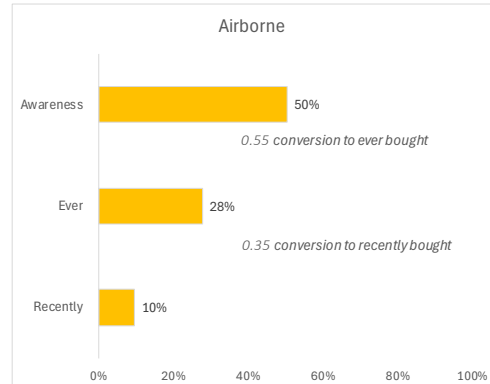
- The ‘Spider Web’ chart shows the brand’s scores on the same six equity dimensions, but this time *indexed* to reflect:
  - The link between each dimension and recent purchase of the brand, ie. what has driven its success to date. This is unique to each brand.
  - The brand’s performance on each attribute relative to its size.
- How to read the chart
  - Blue: Importance in driving Recent Purchase
    - The more outstanding the point, the more important it has been for this brand
  - Orange: The brand’s perceived performance
    - The more outstanding the point, the better the brand is doing on that equity dimension, relative to it’s overall performance and brand size (ie. this *factors in* brand size)
  - A positive gap (Orange more than Blue) indicates a dimension that has made buyers buy it and which is fuelling the brand’s growth. Keep going!
  - A negative gap (Orange less than Blue) indicates a problem that is holding the brand back. If fixed, it would directly contribute to sales for the brand. The bigger the gap, the better the impact, the higher the priority.
  - Negative gaps across 5-6 dimensions suggest the brand is seriously struggling and likely to exit the category within a year.
- Using this example (Donuts):
  - The complication in this category is the distribution constraint: a highly perishable product that may be widely *known of* as a brand, but whose pricing is not well *known* by anyone outside the cities with Donut King stores (WGN and CHC).
  - If Donut King does not plan to expand outside its current cities, data still shows demand for more outlets *within* the cities (perceived Availability among WGN and CHC consumers is still lagging). This should be its priority. Donut King could also consider retail distribution.
  - Since neither of the behemoths – Dunkin and Krispy – have stores in WGN or CHC yet, and that there seems to be pent-up demand for donuts in these cities, it may be simply a matter of time before a larger competitor enters their two established markets. DK would be wise to prepare for this.



# Honey

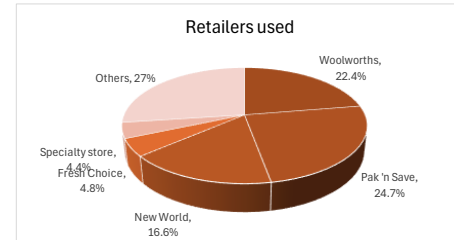


Brand Funnels



Brand Equity

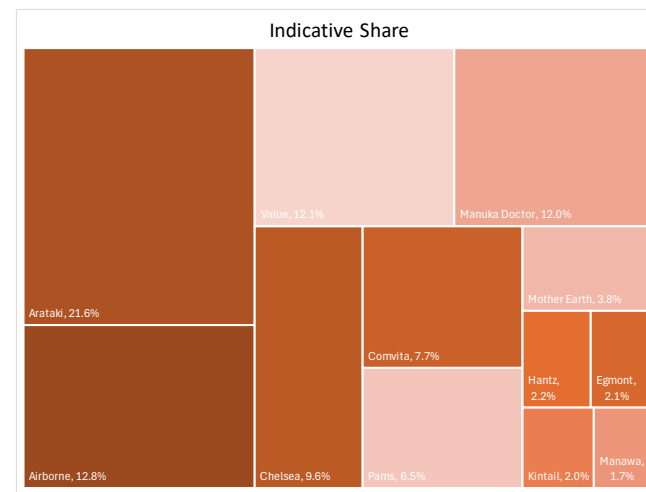
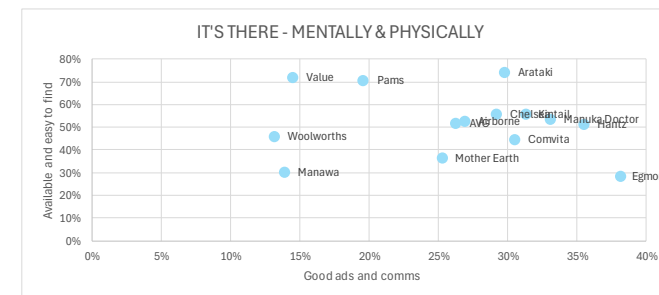
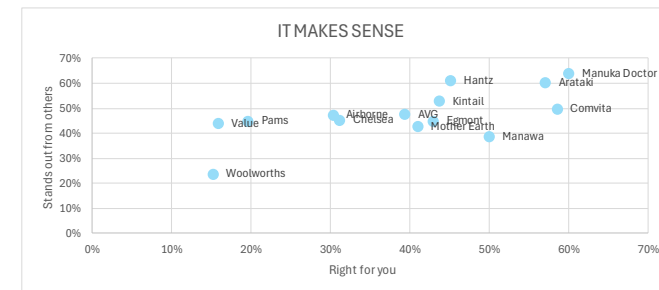
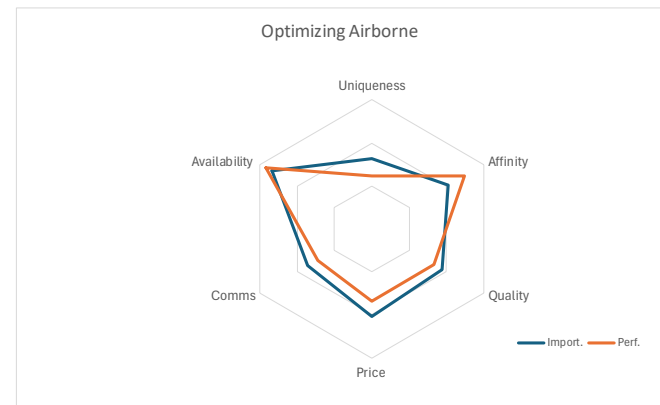
|                      |            |
|----------------------|------------|
| Category Trial Rate  | 94%        |
| Recent Usage         | 76%        |
| Retention            | 0.81       |
| Categ. Experience    | 2.3 brands |
| Brand Equity Summary |            |
| Airborne             | 5.7        |
| Categ. Leader        | 7.9        |
| Categ.Avg.           | 6.4        |



Shopping Behaviour

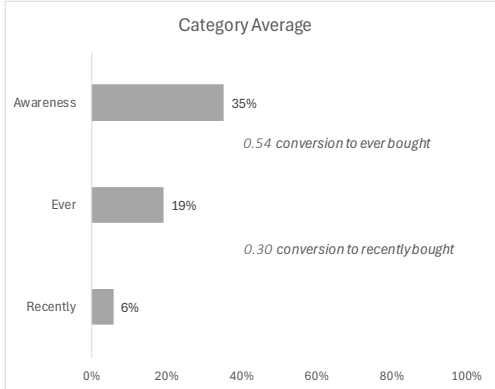
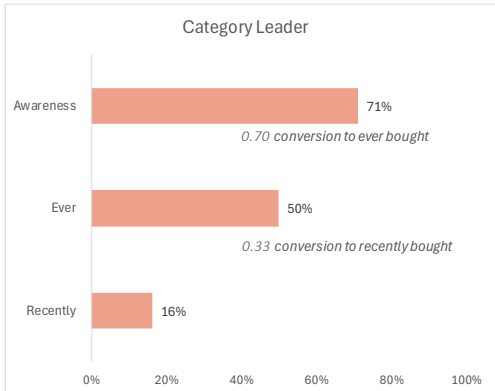
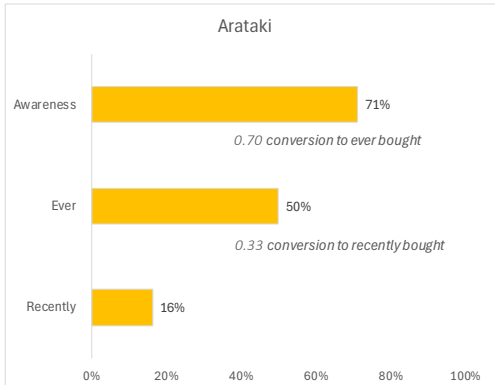


Perceptions of Brands (among those aware)



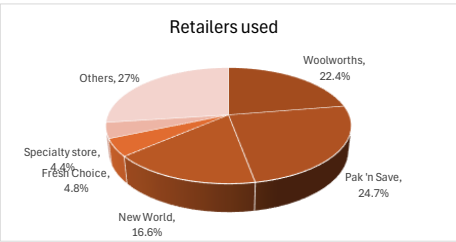


Brand Funnels

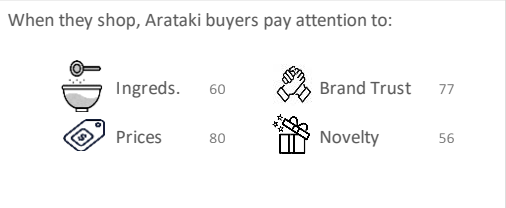


Brand Equity

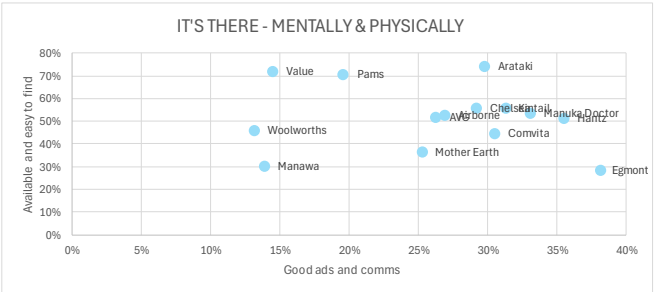
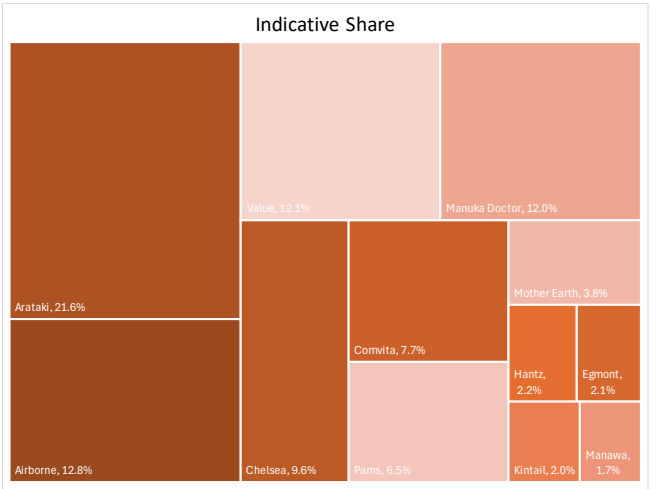
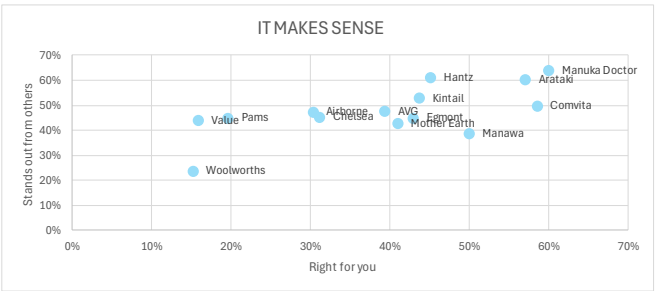
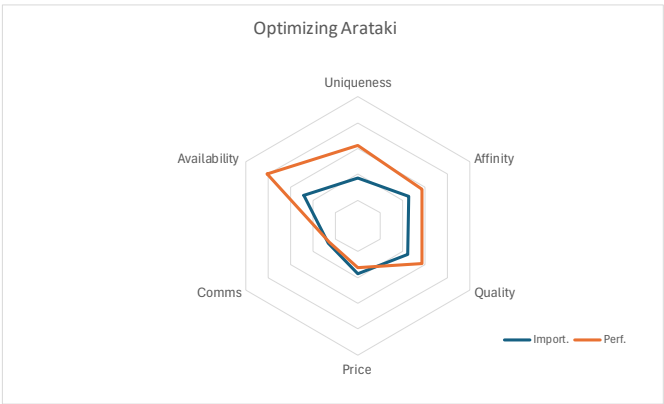
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Shopping Behaviour

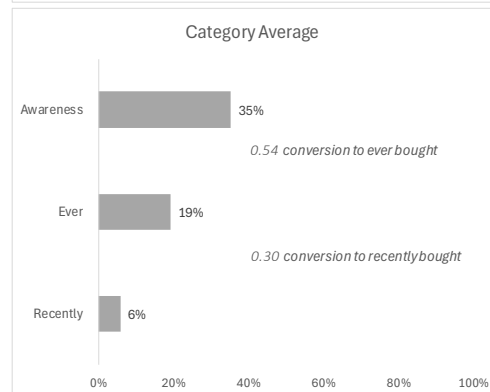
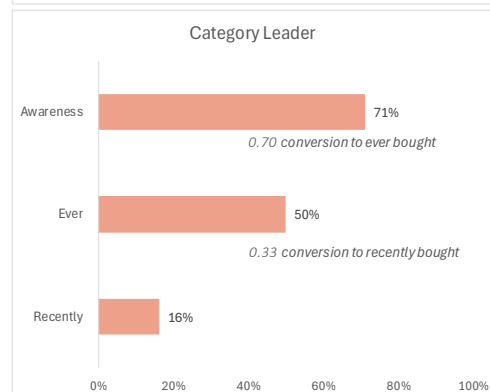
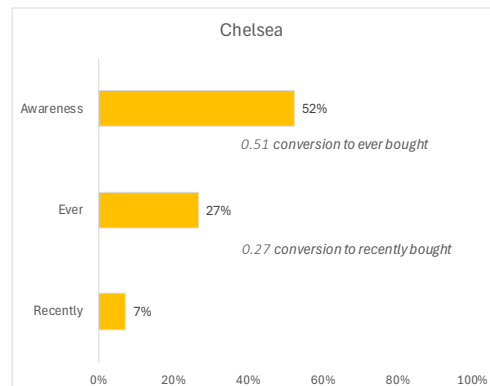


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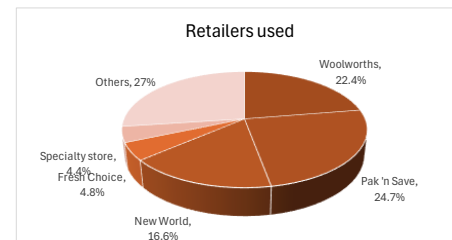


### Brand Funnels



### Brand Equity

|                             |            |
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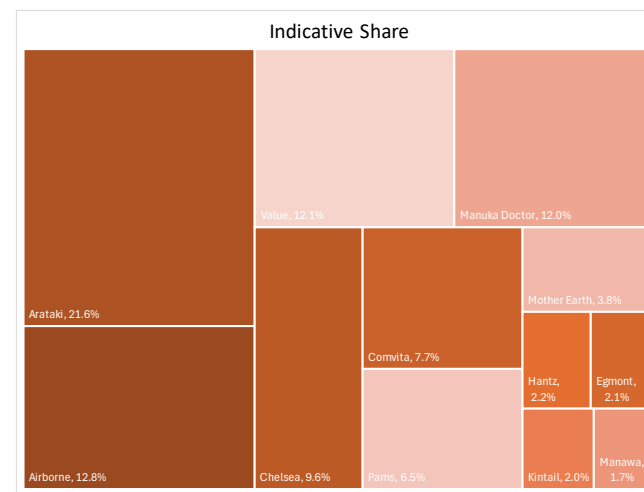
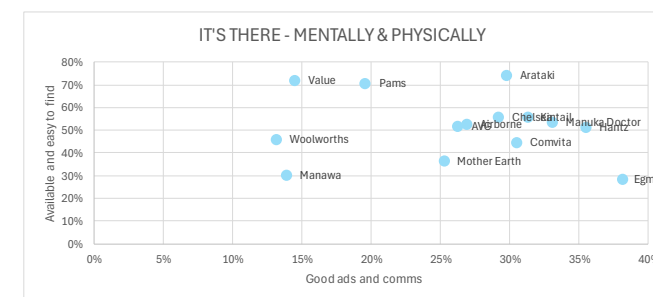
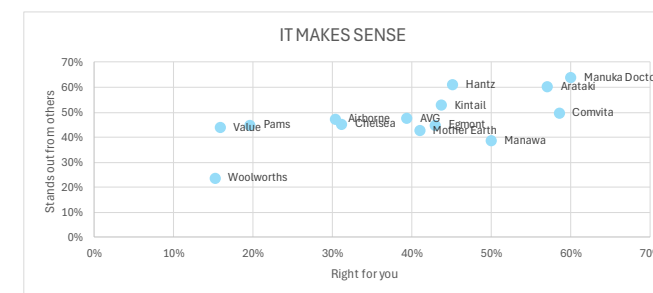
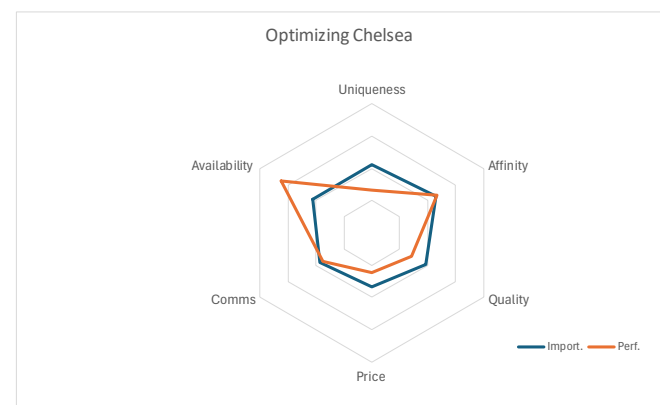


### Shopping Behaviour

When they shop, Chelsea buyers pay attention to:



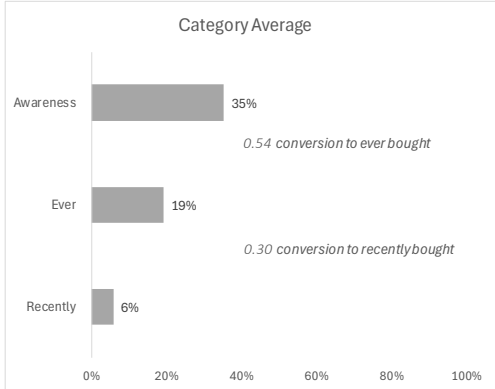
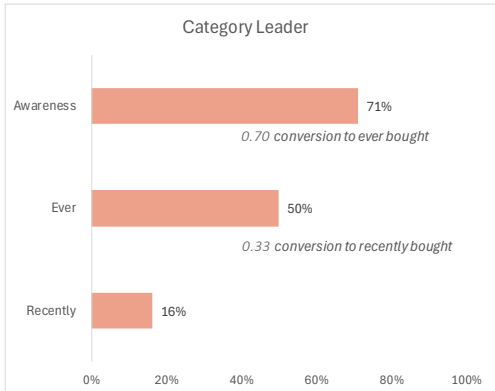
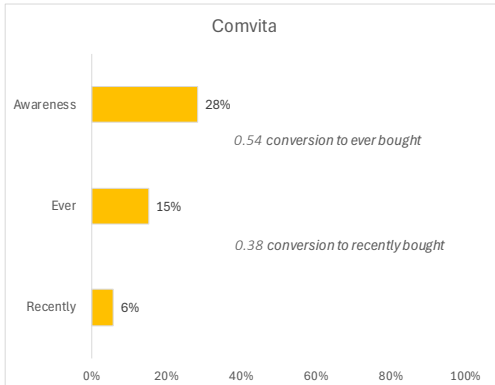
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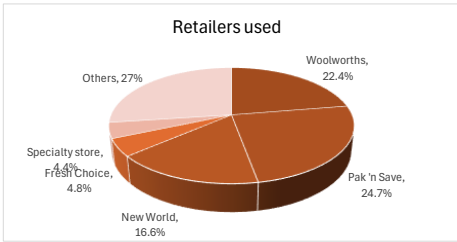
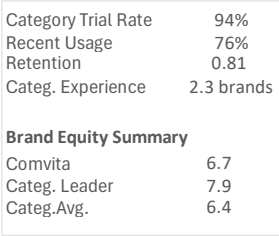




### Brand Funnels



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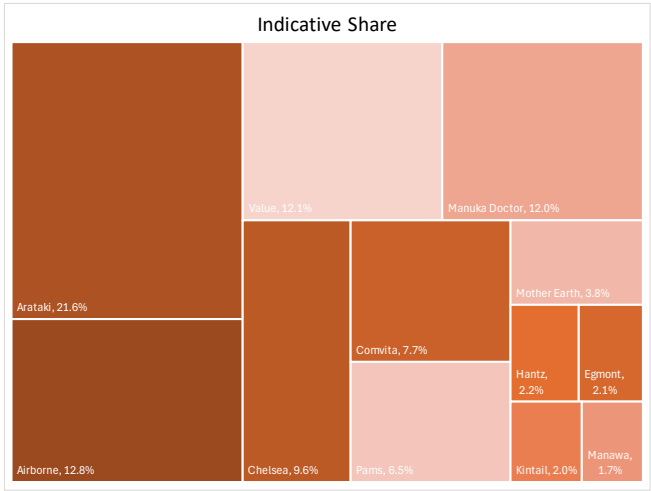
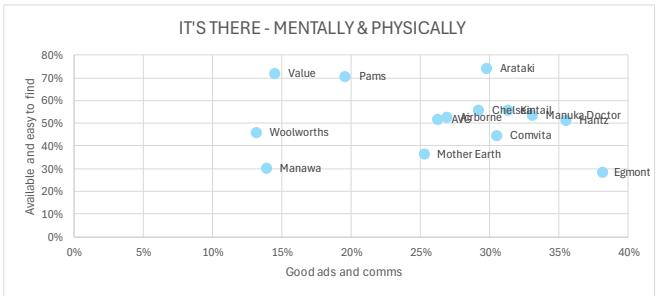
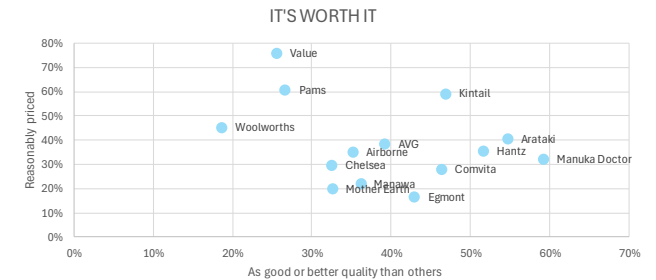
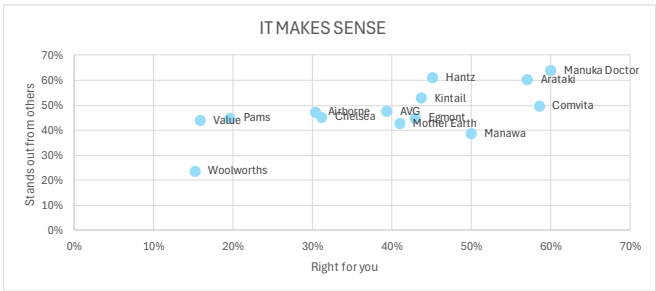
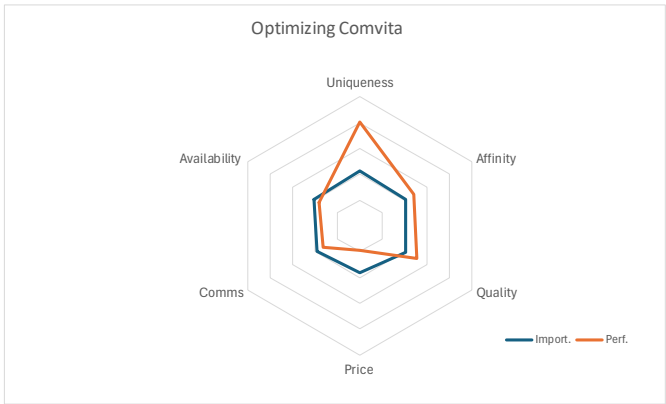


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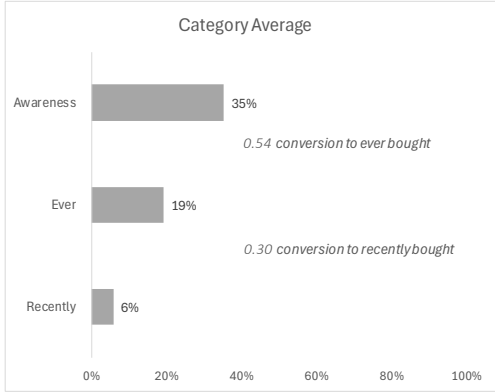
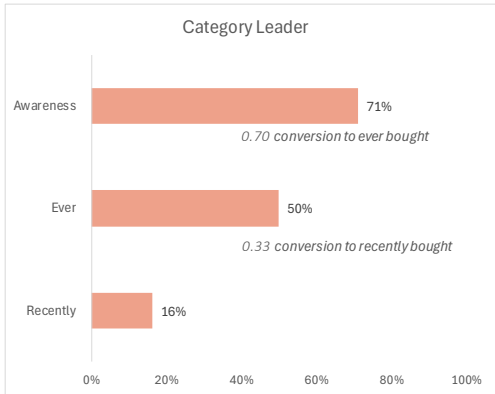
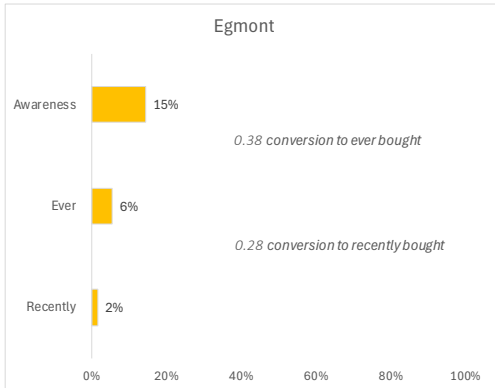


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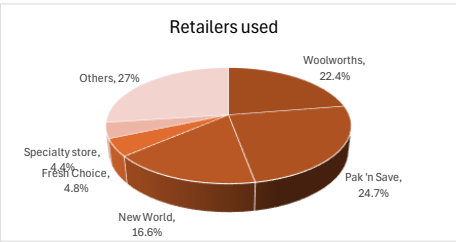


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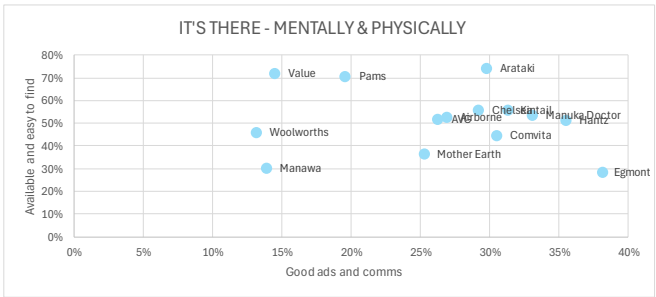
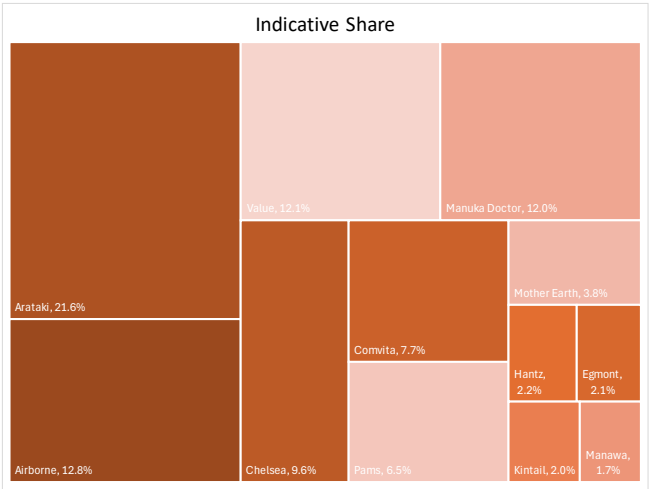
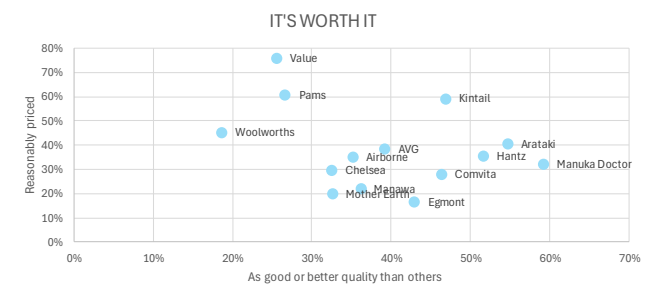
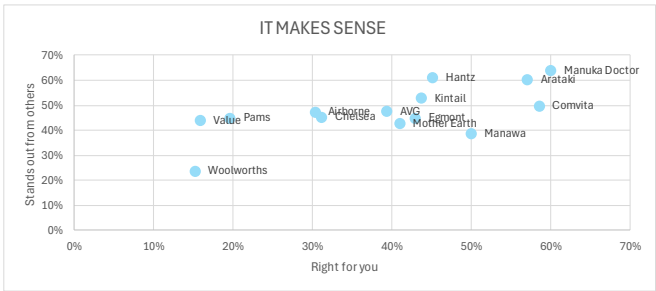
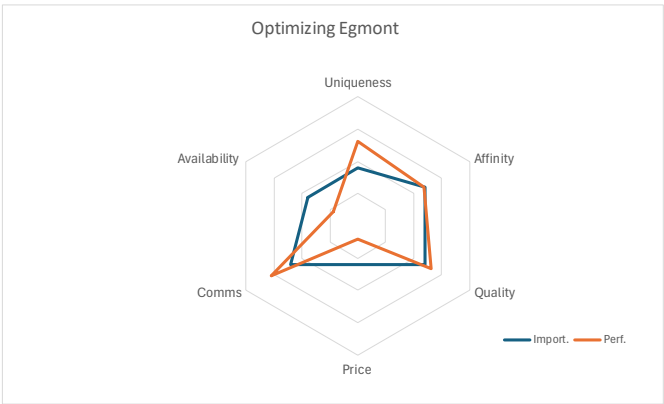


### Shopping Behaviour

When they shop, Egmont buyers pay attention to:

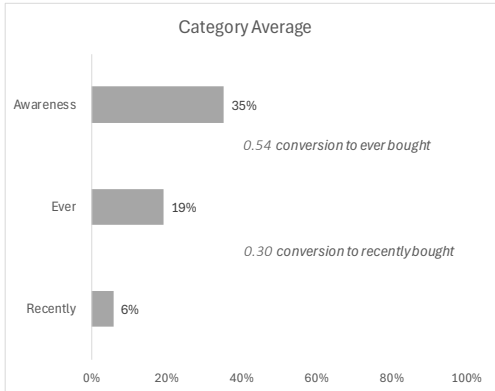
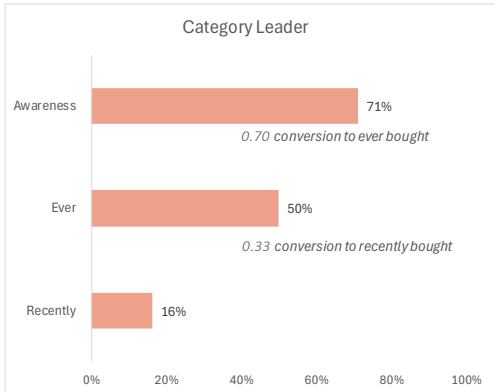
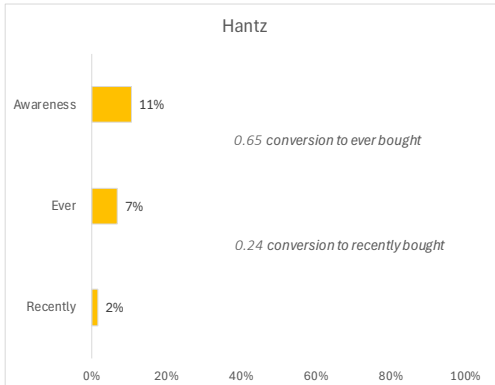
|          |    |             |    |
|----------|----|-------------|----|
| Ingreds. | 72 | Brand Trust | 84 |
| Prices   | 83 | Novelty     | 74 |

### Perceptions of Brands (among those aware)



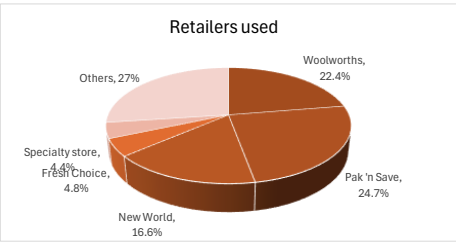


Brand Funnels

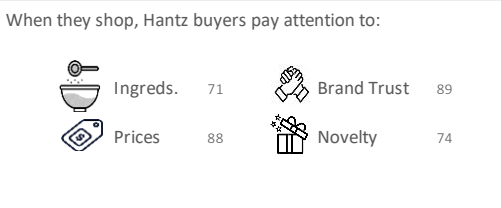


Brand Equity

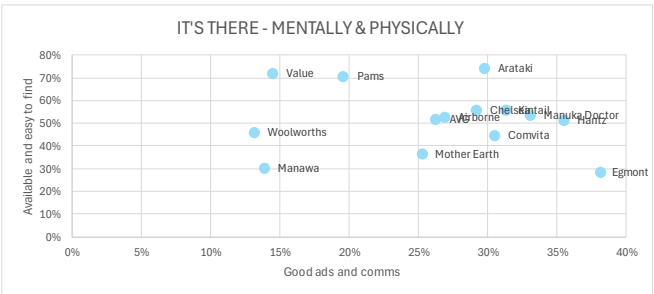
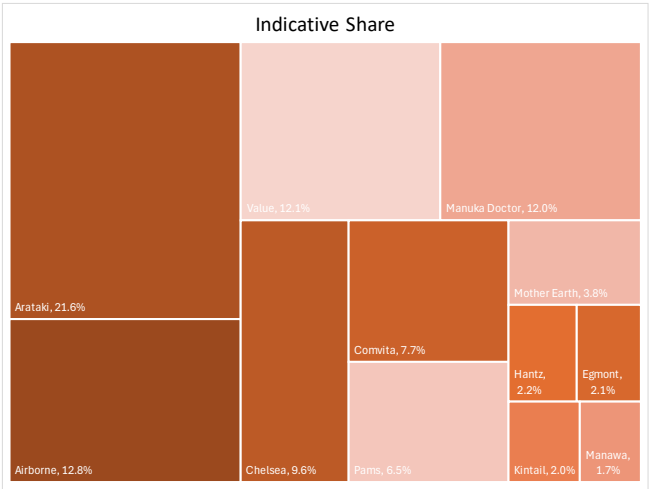
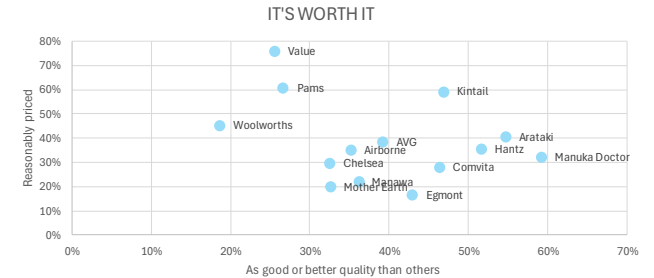
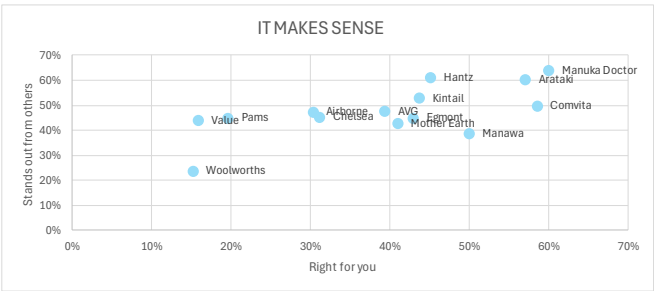
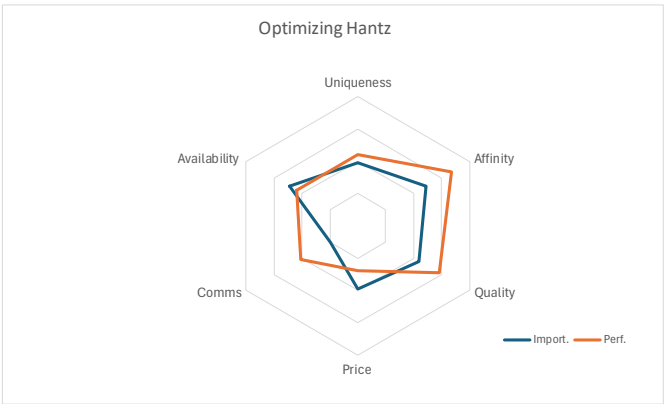
|                             |            |
|-----------------------------|------------|
| Category Trial Rate         | 94%        |
| Recent Usage                | 76%        |
| Retention                   | 0.81       |
| Categ. Experience           | 2.3 brands |
| <b>Brand Equity Summary</b> |            |
| Hantz                       | 7.1        |
| Categ. Leader               | 7.9        |
| Categ.Avg.                  | 6.4        |



Shopping Behaviour

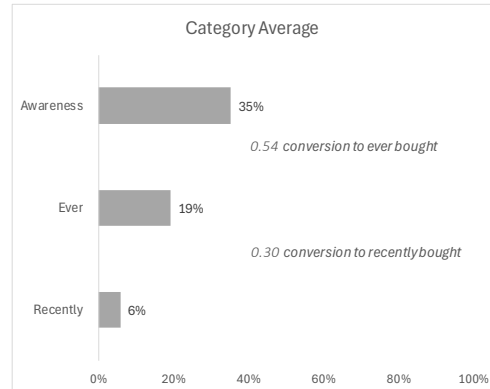
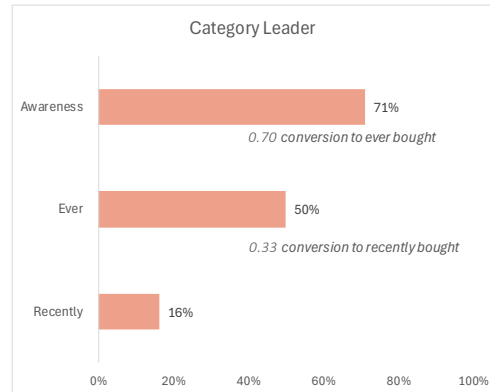
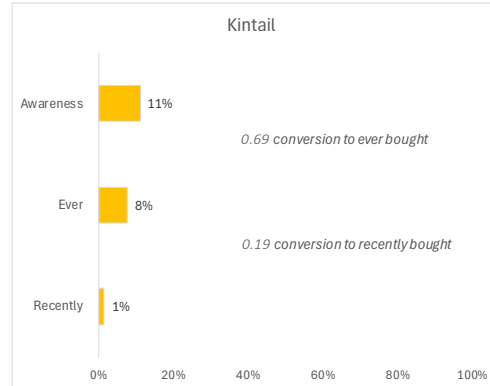


Perceptions of Brands (among those aware)



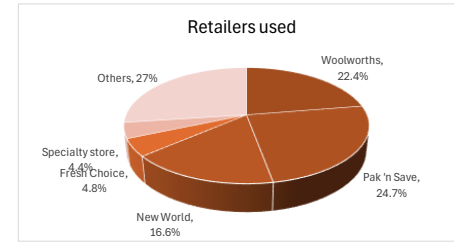


### Brand Funnels



### Brand Equity

|                             |            |
|-----------------------------|------------|
| Category Trial Rate         | 94%        |
| Recent Usage                | 76%        |
| Retention                   | 0.81       |
| Categ. Experience           | 2.3 brands |
| <b>Brand Equity Summary</b> |            |
| Kintail                     | 7.3        |
| Categ. Leader               | 7.9        |
| Categ.Avg.                  | 6.4        |

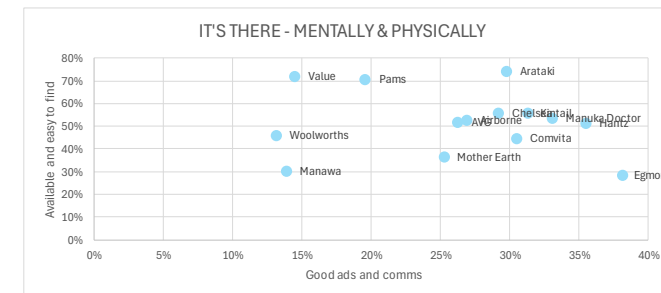
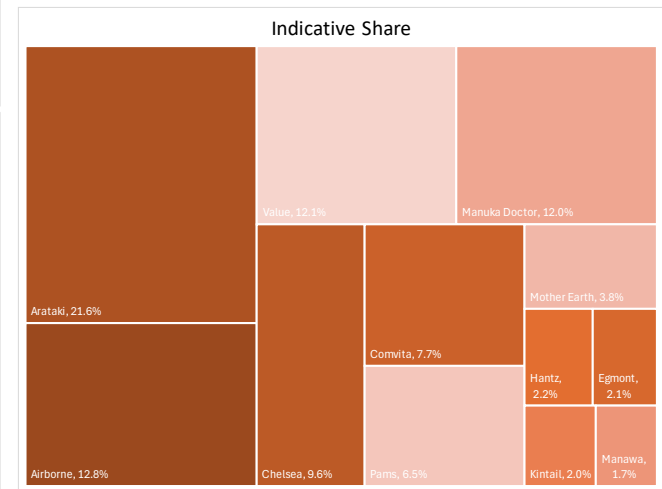
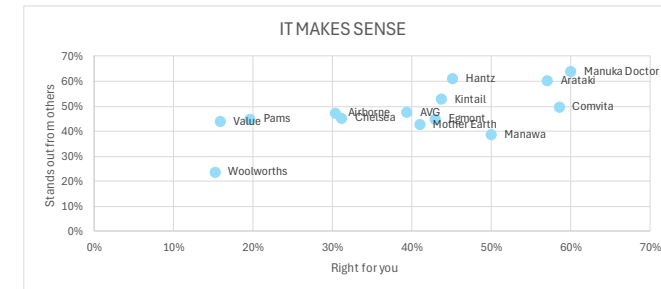
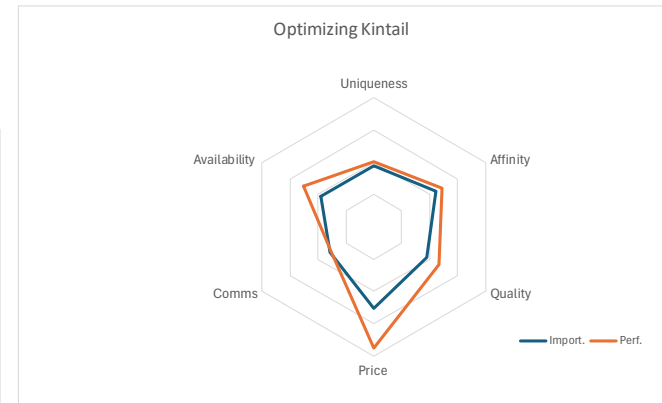


### Shopping Behaviour

When they shop, Kintail buyers pay attention to:

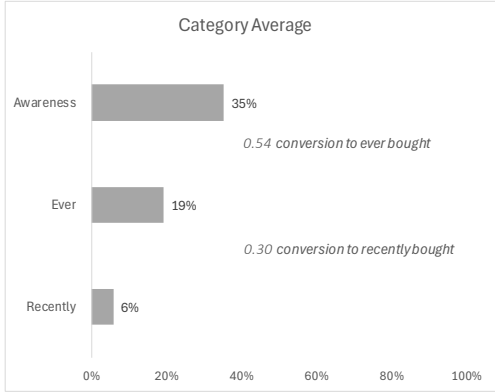
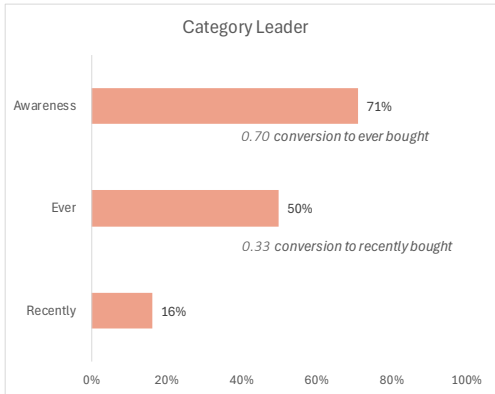
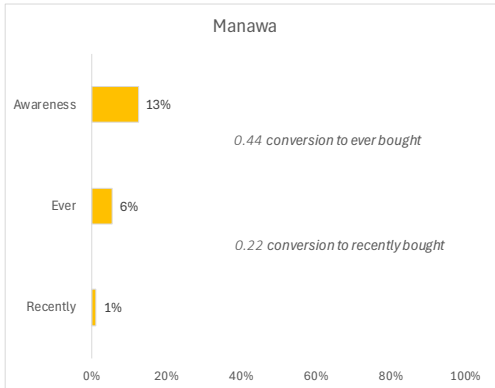
|          |    |             |    |
|----------|----|-------------|----|
| Ingreds. | 75 | Brand Trust | 85 |
| Prices   | 84 | Novelty     | 73 |

### Perceptions of Brands (among those aware)



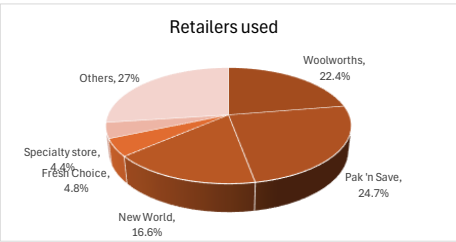


### Brand Funnels



### Brand Equity

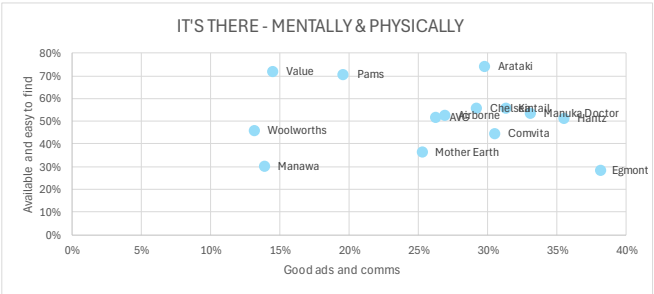
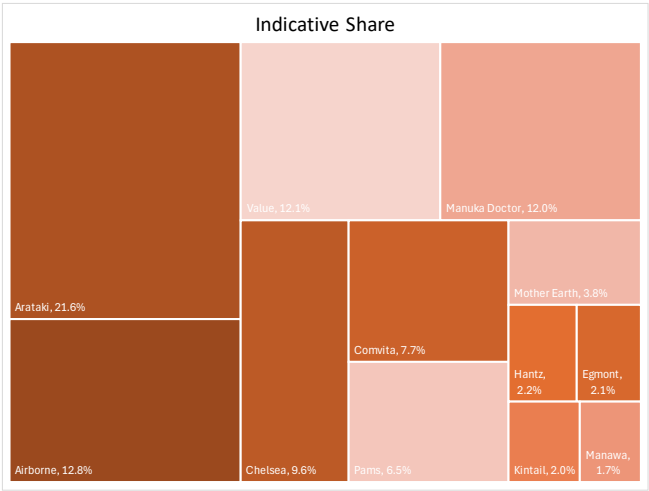
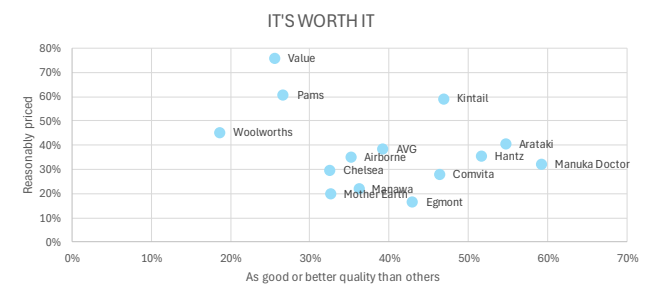
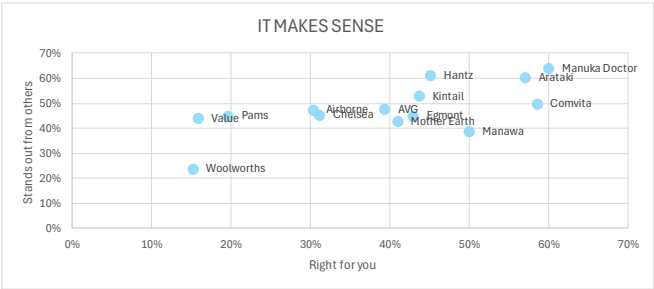
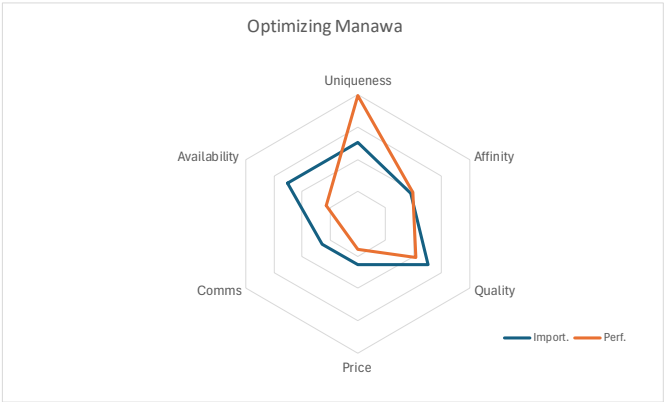
|                             |            |
|-----------------------------|------------|
| Category Trial Rate         | 94%        |
| Recent Usage                | 76%        |
| Retention                   | 0.81       |
| Categ. Experience           | 2.3 brands |
| <b>Brand Equity Summary</b> |            |
| Manawa                      | 5.2        |
| Categ. Leader               | 7.9        |
| Categ.Avg.                  | 6.4        |



### Shopping Behaviour

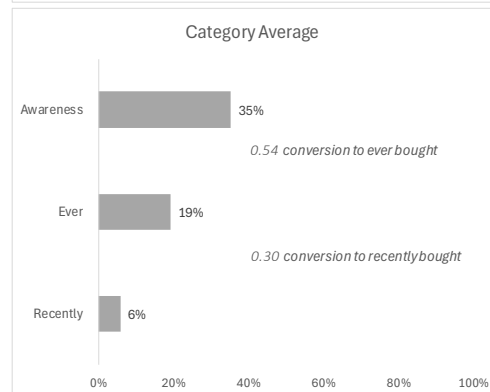
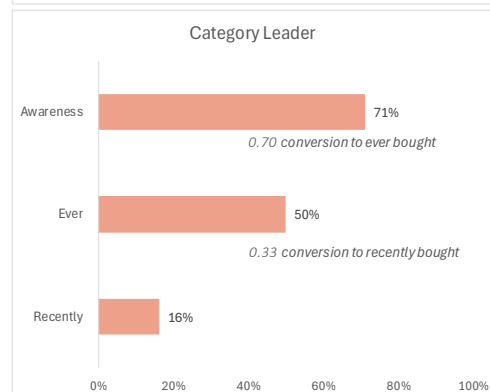
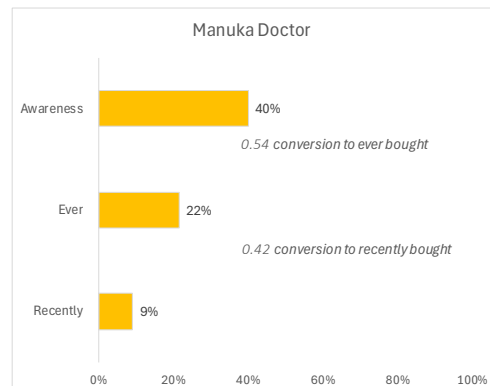
|   |    |             |    |
|---|----|-------------|----|
| When they shop, Manawa buyers pay attention to: |    |             |    |
| Ingreds.  | 80 | Brand Trust | 68 |
| Prices  | 84 | Novelty     | 68 |

### Perceptions of Brands (among those aware)





### Brand Funnels

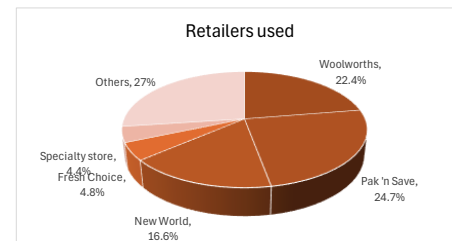


### Brand Equity

|                     |            |
|---------------------|------------|
| Category Trial Rate | 94%        |
| Recent Usage        | 76%        |
| Retention           | 0.81       |
| Categ. Experience   | 2.3 brands |

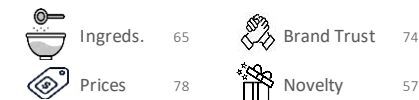
#### Brand Equity Summary

|               |     |
|---------------|-----|
| Manuka Doctor | 7.8 |
| Categ. Leader | 7.9 |
| Categ.Avg.    | 6.4 |

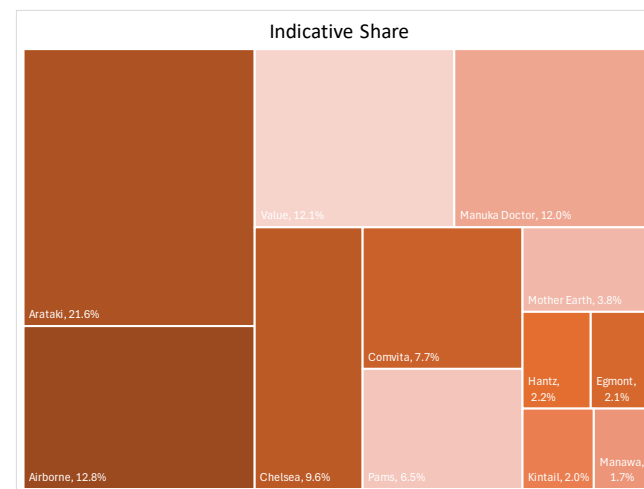
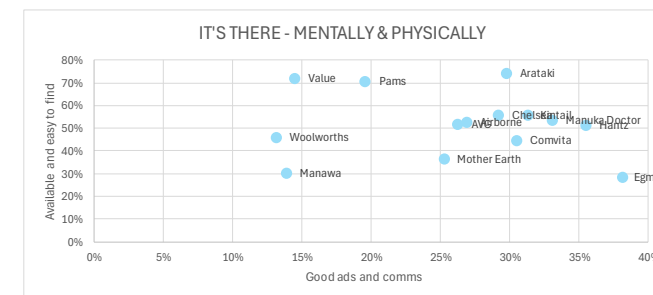
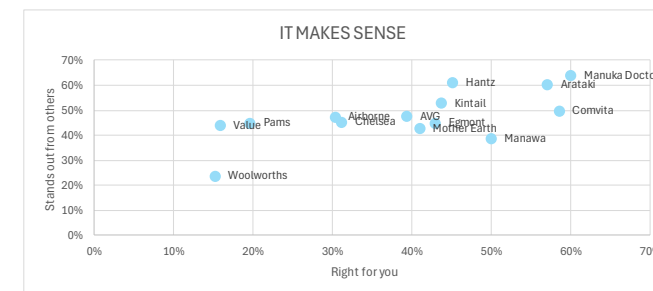
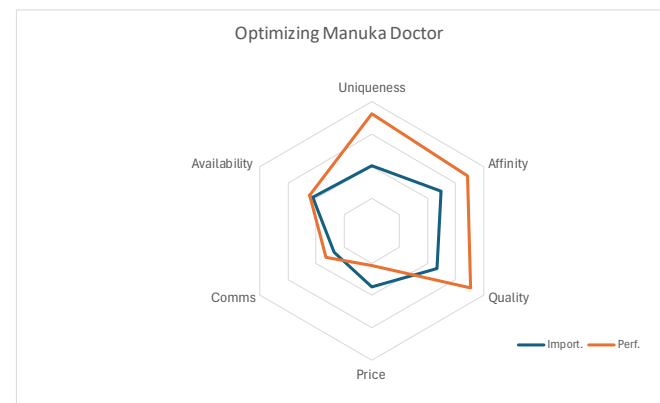


### Shopping Behaviour

When they shop, Manuka Doctor buyers pay attention to:



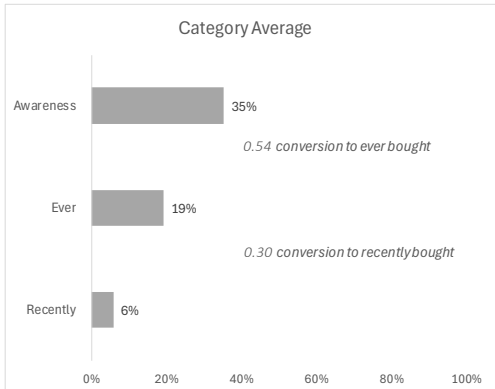
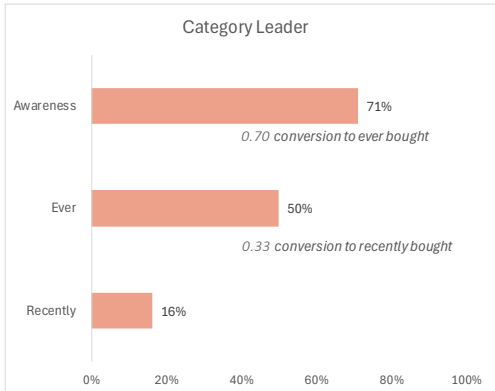
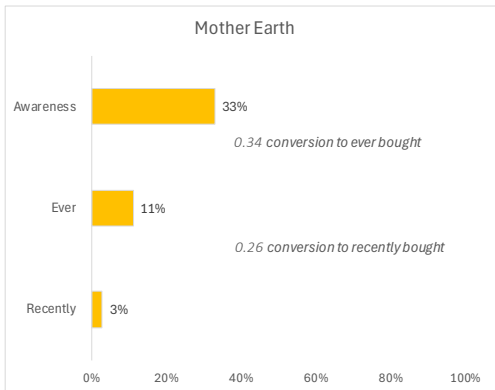
### Perceptions of Brands (among those aware)





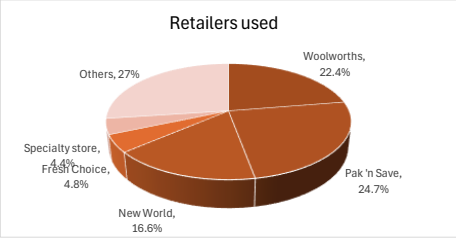


Brand Funnels

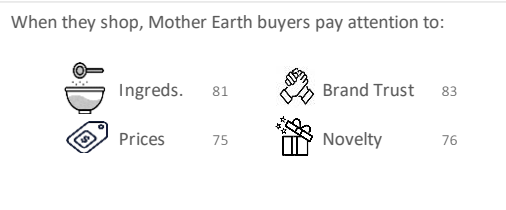


Brand Equity

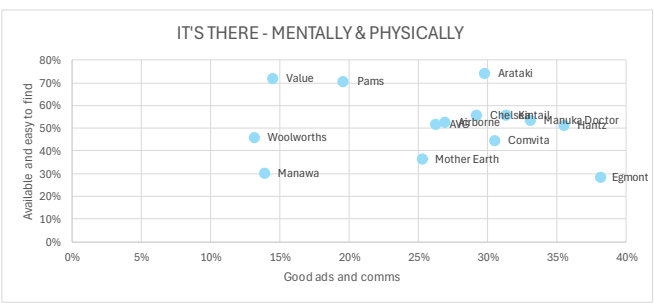
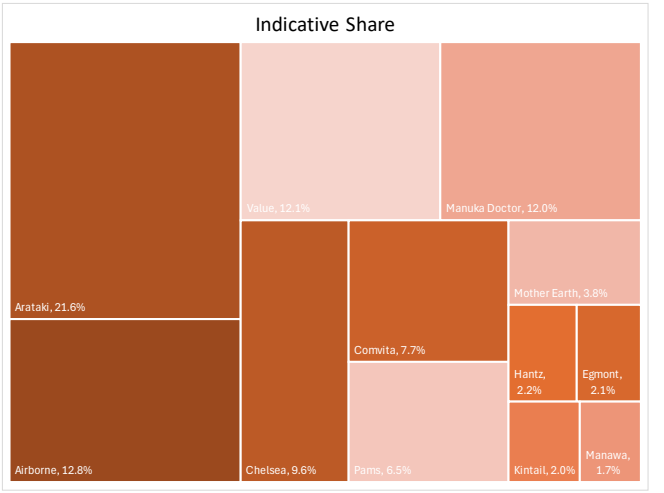
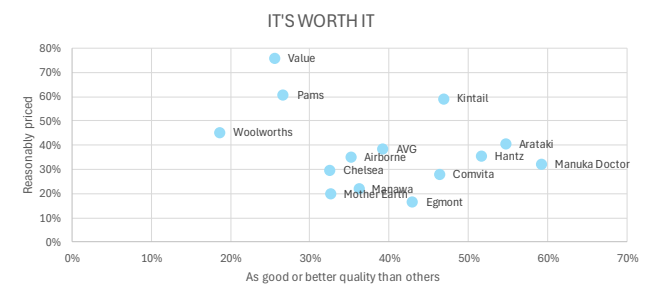
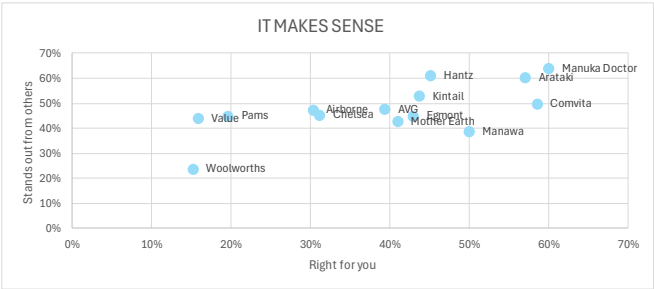
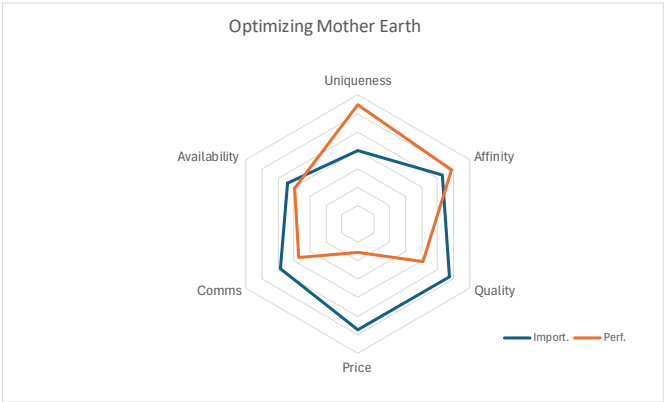
|                      |            |
|----------------------|------------|
| Category Trial Rate  | 94%        |
| Recent Usage         | 76%        |
| Retention            | 0.81       |
| Categ. Experience    | 2.3 brands |
| Brand Equity Summary |            |
| Mother Earth         | 5.1        |
| Categ. Leader        | 7.9        |
| Categ.Avg.           | 6.4        |



Shopping Behaviour

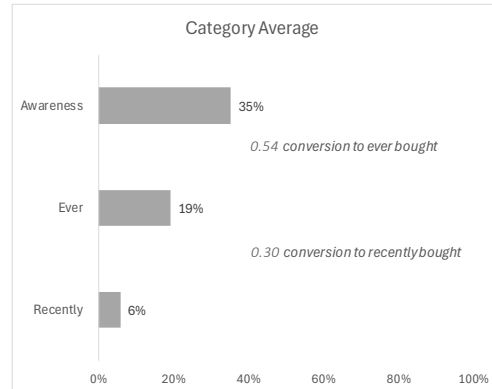
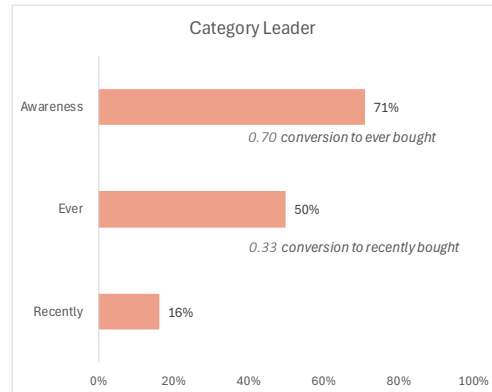
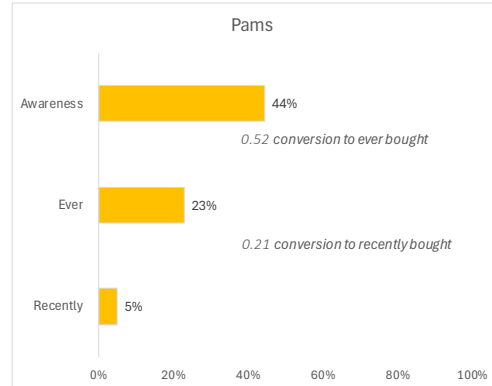


Perceptions of Brands (among those aware)



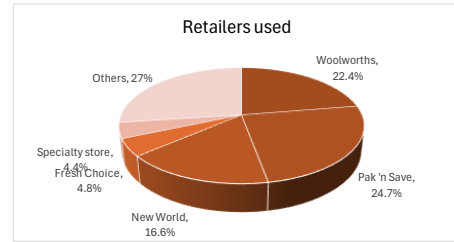


Brand Funnels



Brand Equity

|                             |            |
|-----------------------------|------------|
| Category Trial Rate         | 94%        |
| Recent Usage                | 76%        |
| Retention                   | 0.81       |
| Categ. Experience           | 2.3 brands |
| <b>Brand Equity Summary</b> |            |
| Pams                        | 6.9        |
| Categ. Leader               | 7.9        |
| Categ.Avg.                  | 6.4        |

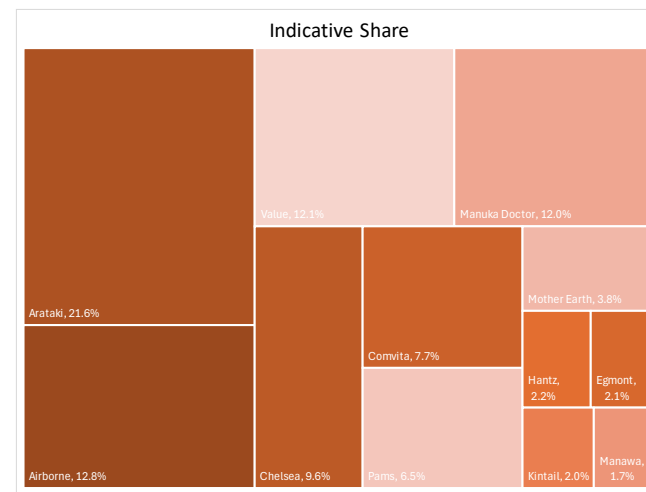
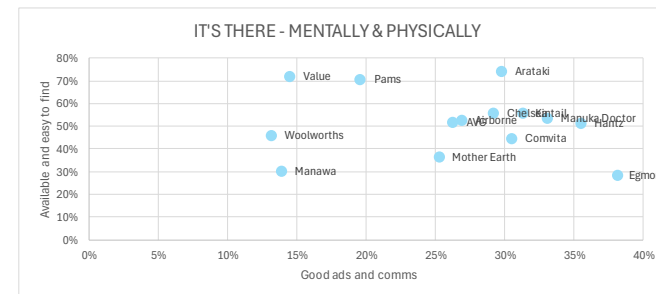
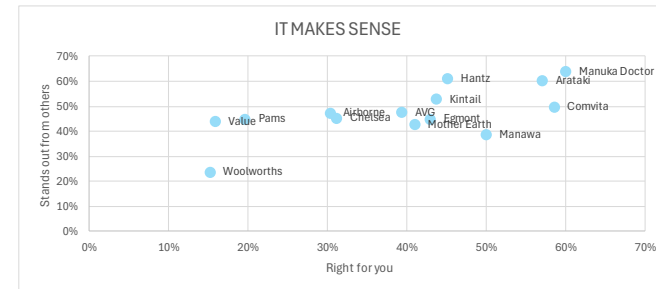
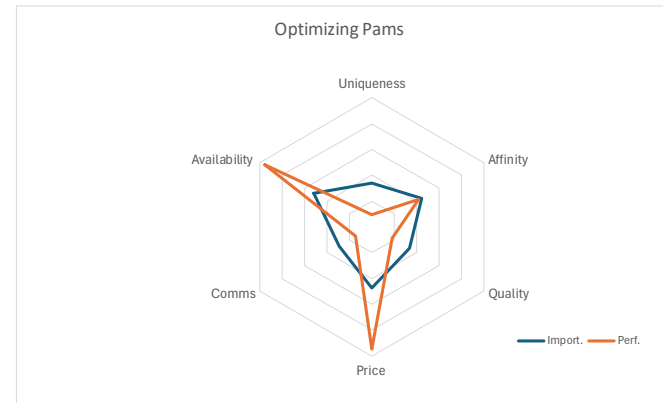


Shopping Behaviour

When they shop, Pams buyers pay attention to:

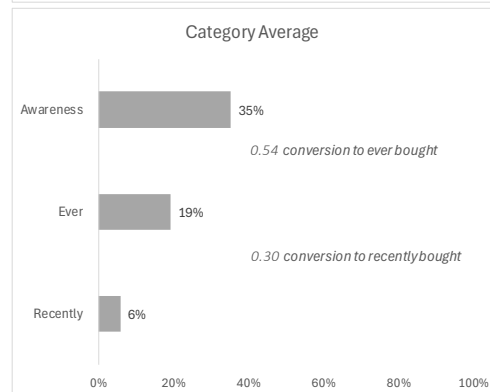
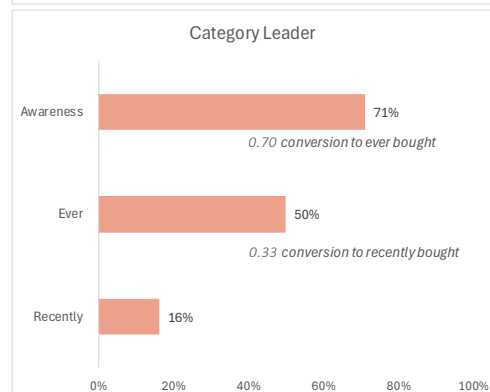
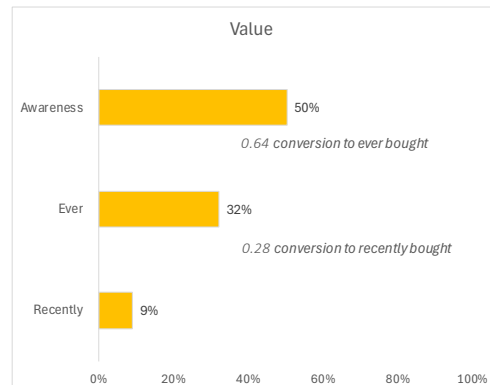
|          |    |             |    |
|----------|----|-------------|----|
| Ingreds. | 64 | Brand Trust | 78 |
| Prices   | 84 | Novelty     | 57 |

Perceptions of Brands (among those aware)





### Brand Funnels

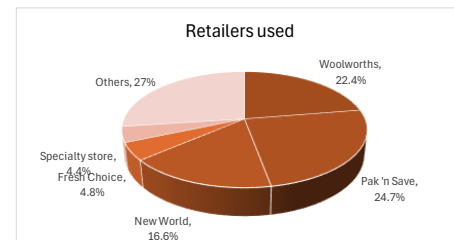


### Brand Equity

|                     |            |
|---------------------|------------|
| Category Trial Rate | 94%        |
| Recent Usage        | 76%        |
| Retention           | 0.81       |
| Categ. Experience   | 2.3 brands |

#### Brand Equity Summary

|               |     |
|---------------|-----|
| Value         | 7.8 |
| Categ. Leader | 7.9 |
| Categ.Avg.    | 6.4 |

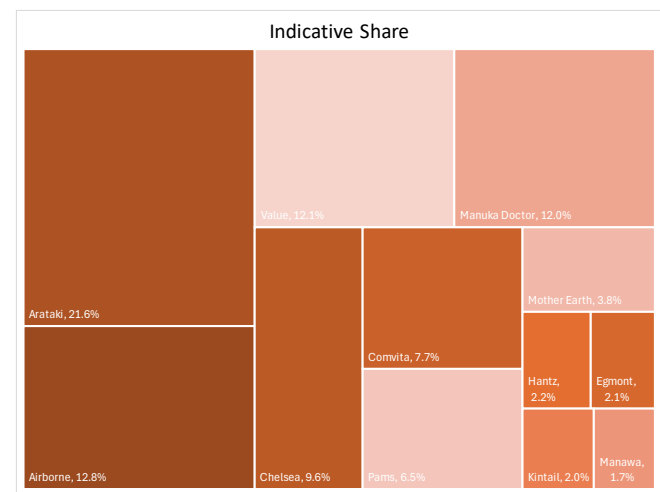
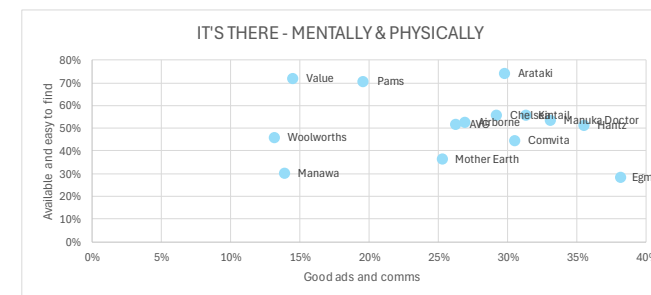
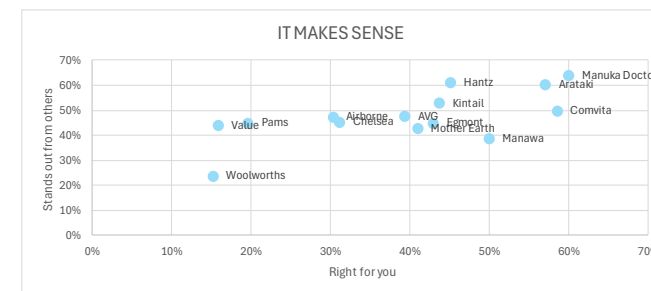
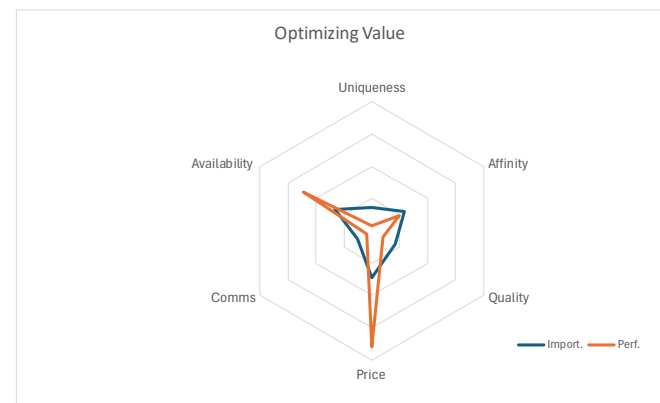


### Shopping Behaviour

When they shop, Value buyers pay attention to:

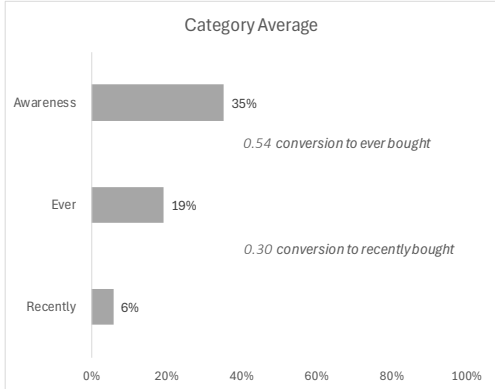
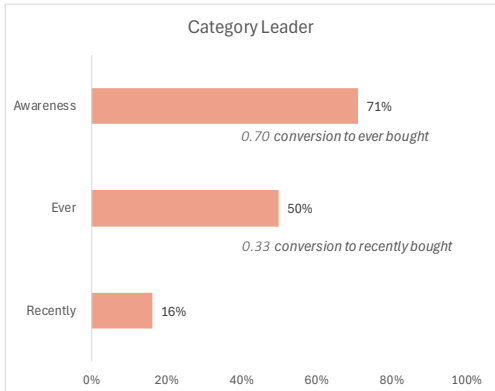
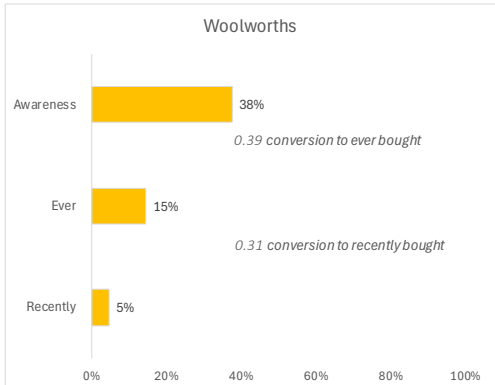


### Perceptions of Brands (among those aware)



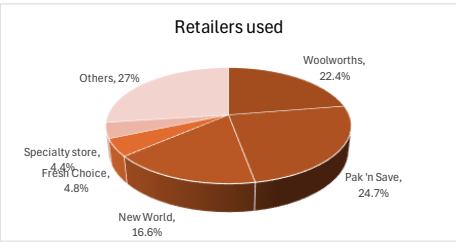


Brand Funnels

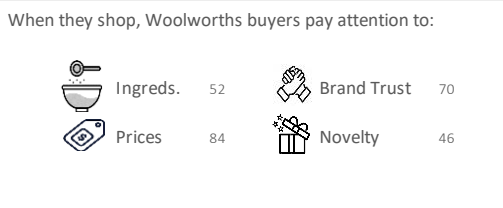


Brand Equity

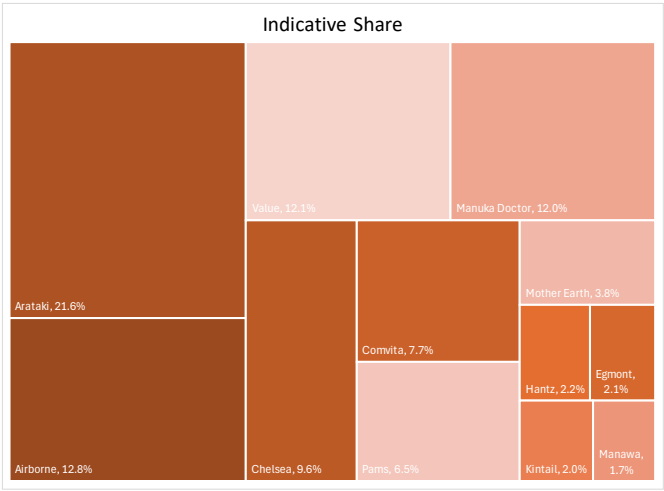
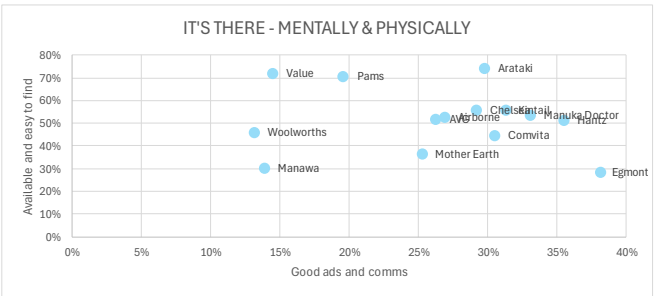
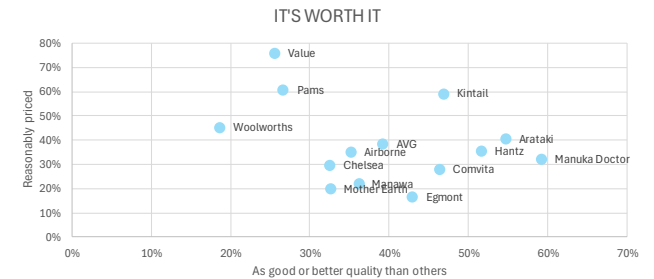
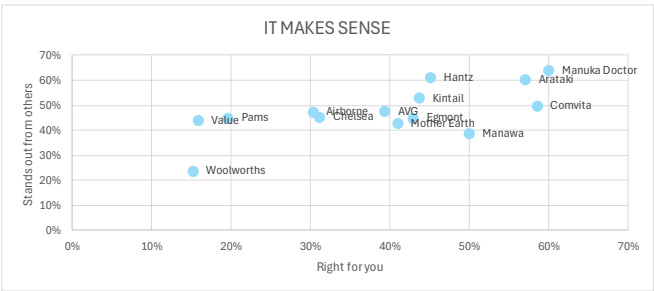
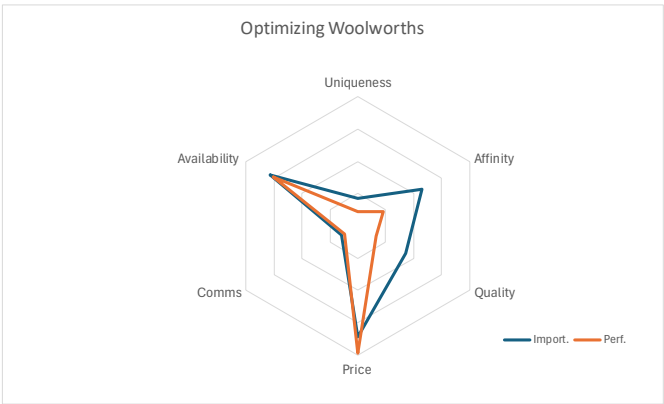
|                      |            |
|----------------------|------------|
| Category Trial Rate  | 94%        |
| Recent Usage         | 76%        |
| Retention            | 0.81       |
| Categ. Experience    | 2.3 brands |
| Brand Equity Summary |            |
| Woolworths           | 4.7        |
| Categ. Leader        | 7.9        |
| Categ.Avg.           | 6.4        |



Shopping Behaviour



Perceptions of Brands (among those aware)



# Grocery Shopping Locations

## Honey Buyers

|                         | <u>Airborne</u> | <u>Arataki</u> | <u>Chelsea</u> | <u>Comvita</u> | <u>Egmont</u> | <u>Hantz</u> | <u>Kintail</u> | <u>Manawa</u> | <u>Manuka Doctor</u> | <u>Mother Earth</u> | <u>Pams</u> | <u>Value</u> | <u>Woolworths</u> |
|-------------------------|-----------------|----------------|----------------|----------------|---------------|--------------|----------------|---------------|----------------------|---------------------|-------------|--------------|-------------------|
| Base: Recent Buyers     | 28              | 48             | 21             | 17             | 5             | 5            | 4              | 4             | 26                   | 8                   | 15          | 26           | 13                |
| <u>Location</u>         |                 |                |                |                |               |              |                |               |                      |                     |             |              |                   |
| Local grocer / Dairy    | 3.5%            | 4.0%           | 5.8%           | 5.0%           | 5.0%          | 4.9%         | 10.8%          | 5.6%          | 4.8%                 | 7.0%                | 2.7%        | 5.1%         | 6.0%              |
| Woolworths              | 21.1%           | 21.9%          | 15.4%          | 10.0%          | 12.5%         | 12.2%        | 10.8%          | 5.6%          | 20.5%                | 11.3%               | 17.8%       | 16.7%        | 16.7%             |
| Pak 'n Save             | 16.7%           | 22.5%          | 18.3%          | 11.3%          | 17.5%         | 9.8%         | 13.5%          | 16.7%         | 25.3%                | 11.3%               | 19.2%       | 26.9%        | 10.7%             |
| New World               | 18.4%           | 17.9%          | 11.5%          | 11.3%          | 17.5%         | 19.5%        | 16.2%          | 11.1%         | 16.9%                | 12.7%               | 17.8%       | 14.1%        | 10.7%             |
| Farro                   | 0.0%            | 2.6%           | 1.9%           | 5.0%           | 0.0%          | 4.9%         | 2.7%           | 11.1%         | 3.6%                 | 9.9%                | 0.0%        | 1.3%         | 3.6%              |
| Moore Wilson            | 4.4%            | 5.3%           | 9.6%           | 10.0%          | 5.0%          | 0.0%         | 5.4%           | 5.6%          | 3.6%                 | 5.6%                | 2.7%        | 2.6%         | 7.1%              |
| Four Square             | 4.4%            | 3.3%           | 3.8%           | 3.8%           | 5.0%          | 0.0%         | 5.4%           | 5.6%          | 0.0%                 | 5.6%                | 2.7%        | 2.6%         | 2.4%              |
| Fresh Choice            | 6.1%            | 4.6%           | 6.7%           | 10.0%          | 10.0%         | 12.2%        | 5.4%           | 5.6%          | 3.6%                 | 9.9%                | 8.2%        | 9.0%         | 10.7%             |
| Super Value             | 2.6%            | 1.3%           | 2.9%           | 3.8%           | 7.5%          | 4.9%         | 5.4%           | 0.0%          | 1.2%                 | 2.8%                | 5.5%        | 1.3%         | 2.4%              |
| Petrol Station          | 1.8%            | 2.0%           | 1.9%           | 0.0%           | 2.5%          | 0.0%         | 0.0%           | 0.0%          | 1.2%                 | 2.8%                | 0.0%        | 0.0%         | 1.2%              |
| Maker's store or site   | 5.3%            | 2.0%           | 4.8%           | 7.5%           | 2.5%          | 7.3%         | 5.4%           | 5.6%          | 4.8%                 | 2.8%                | 5.5%        | 6.4%         | 9.5%              |
| Farmer's market         | 4.4%            | 3.3%           | 6.7%           | 6.3%           | 2.5%          | 14.6%        | 2.7%           | 16.7%         | 6.0%                 | 7.0%                | 5.5%        | 3.8%         | 8.3%              |
| Specialty store         | 4.4%            | 4.6%           | 5.8%           | 11.3%          | 7.5%          | 4.9%         | 8.1%           | 5.6%          | 3.6%                 | 7.0%                | 5.5%        | 6.4%         | 4.8%              |
| Delivery website or app | 7.0%            | 4.6%           | 4.8%           | 5.0%           | 5.0%          | 4.9%         | 8.1%           | 5.6%          | 4.8%                 | 4.2%                | 6.8%        | 3.8%         | 6.0%              |
| Total                   | 100%            | 100%           | 100%           | 100%           | 100%          | 100%         | 100%           | 100%          | 100%                 | 100%                | 100%        | 100%         | 100%              |

Think about all that you spend on food and groceries in, say, a month. How much of that amount would you spend at these places (including online and offline)?

(NOTE: This question is about where shoppers purchase all groceries, not specifically the brand's category. This is a multi-choice question, answers indexed to total 100%)

(Base: Recent buyers of respective brand. Caution – some bases may be small)



# About Scale NZ

- [Scale NZ](#) is a market intelligence and consultancy provider that guides brands seeking growth opportunities in New Zealand and globally.
- Over fifty years of combined experience in commercializing food brands helps our customers:
  - Create robust business cases
  - Develop products that fit makers and markets
  - Shorten time to launch
  - Reduce investment risk
- Scale NZ provides qualitative and quantitative research solutions for companies and brands of all sizes.
- Our category experience is broad and includes apparel, footwear, personal care, skin care, fragrances, chocolate, confectionary, coffee, yoghurt, ice cream, processed meat, fizzy drinks, noodles, filled pasta, breakfast cereal, beer, whisky, outdoor media, finance, automotive, airlines, resorts, medical devices, health supplements, vitamins and OTC pharmaceuticals.



