World Value Index

HOW PEOPLE PERCEIVE BRANDS' PURPOSE
Ranked by Shareholders
People
Highlights in the Report

Cultural Insights

People believe in the ability for business to make a positive impact but have low trust business leaders to do what is right.

Elites and Republicans trust business leaders more. Only 38% of Low income people trust business leaders to do what is right.

While Democrats and Lower Income people are sour on the direction of the country, they are optimistic about their own family’s economic prospects.

Millennials have been active. 4/10 Millennials report having taken a concrete action IRL like marching in a protest.

Multiculturalists are much more likely to feel they are able to affect the world around them than Traditionalists. And creating change in the world is more important to Multiculturalists than Traditionalists.

Activism is somewhat of a luxury, with higher skews for Elites on taking concrete action, supporting causes and having a personal goal of creating change in the world.

Index Spotlight

Starbucks is the most polarizing brand. NPR is second. Marlboro is not at the bottom of the list for Boomers and Traditionalists.

Procter & Gamble seems to have a Millennial problem. Brand skewing towards Elites: Patagonia, Khan Academy, Chobani, Starbucks.

Brands skewing towards Low income people: Barbie, Yahoo, NBC, Always.
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There is no truth. Only perception.

Gustave Flaubert (1821 – 1880)
Why We Do This Report

Brands today are measured in myriad metrics. From entrenched measures like financial performance, shareholder value, and awareness to emerging indexes like simplicity, meaning, and trust. Meanwhile, in the impact space, new standards are being developed to measure how businesses are solving social, environmental, and economic problems. While that’s generally a good thing, they’re missing a key factor — people. They don’t measure the perceived value that the public places on brands’ purpose.

So in 2016, our team at enso developed the World Value Index to measure how people rank companies and nonprofits on their perceived mission or purpose — namely the extent to which brands stand for something other than making money, whether they align with what people care about, and if it’s worth publicly, actively supporting. A year later, after a period of unprecedented social and cultural upheaval, when trust in public and private institutions has hit an all-time low, we are publishing the second wave of our results. We hope that you find them as thought provoking as we have.

If you have any questions or are interested in a deeper dive into a brand or segment, please contact us: WorldValue@enso.co

Thanks for reading,
enso
What’s new in World Value Index 2017

With a year to reflect on the results of our inaugural study, we have made a few minor improvements to our methodology. To begin, we amended the survey questions to include the word “mission” in addition to “purpose” for clarity. Next, to gain a deeper understanding of how consumers internalize each brand’s value, we added the open-ended question, “describe in your own words the purpose or mission as you understand it for each of the following brands.”

We also expanded our audience segments this year to include: Male, Female, Dads, Multiculturalists, Traditionalists, Future Concerned, Lower Income, and Active Participation. These additional segments provide deeper intelligence into the relationships that different demographic and psychographic audiences have with brands.

Finally, we included a series of zeitgeist questions to surface insights into people’s attitudes and beliefs to provide cultural context to the World Value index.
Methodology Dimensions
We look at four dimensions to make up this metric.

- **Awareness**: How aware are you of the brand's purpose or mission beyond making money?
- **Support**: Is the brand's purpose or mission something that you would openly support?
- **Alignment**: Does the brand's purpose or mission align with what you care about?
- **Purchase**: Does the brand's purpose or mission motivate you to buy products or services from the brand?
Methodology Research

<table>
<thead>
<tr>
<th>Wave</th>
<th>Number of Brands Tested</th>
<th>Sample Size Per Wave</th>
<th>Overall Margin of Error Per Wave</th>
</tr>
</thead>
<tbody>
<tr>
<td>Wave 1</td>
<td>50</td>
<td>1,000</td>
<td>+/-3.1%</td>
</tr>
<tr>
<td>Wave 2</td>
<td>50</td>
<td>1,000</td>
<td>+/-3.1%</td>
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<tr>
<td>Wave 3</td>
<td>50</td>
<td>1,000</td>
<td>+/-3.1%</td>
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</tbody>
</table>

Please note that the margins of error by wave for each sub-audience and individual brand will be higher than the total audience.

Research Partner

Quadrant Strategies (www.quadrantstrategies.com) is a research-driven consultancy that has worked with more than 25 of the Fortune 50, as well as a range of other companies, political leaders around the world, and major NGOs. Their specialty is helping companies facing significant challenges to their reputation or brand, or even full-blown crises. They help them pivot from defense to offense – to a place where they can move the brand and business forward. They do this using carefully crafted research to create the strategy and tactics for dealing with the short-term challenges and then determining what the company’s story should be for the long-term.

Quadrant Strategies was founded on a clear principle: clients need strategic counsel, not just data. Their partners have advised on some of the highest profile corporate and public affairs issues of the last two decades, as well as presidents and prime ministers around the world. For more information please visit www.quadrantstrategies.com.
Methodology Questions

Each brand was ranked by an index score calculated using four key questions that participants answered for each brand:

- **Awareness of Purpose**
  For each of the following, please indicate how aware you are, or not, of its purpose or mission (beyond just making money).

- **Alignment with Purpose**
  For each of the following, please indicate the extent to which its purpose or mission is in line with what you yourself care about.

- **Active Support**
  For each of the following, please indicate how likely you would be to openly support an effort to advance its core purpose or mission.

- **Impact on Purchase**
  For each of the following, please indicate whether its purpose or mission as you understand it makes you more or less likely to buy its products or services if given the opportunity to.

Pre-question Description

Many companies and brands today seem to have a purpose or mission beyond just making money - for example, improving people’s lives or changing the world. This can be achieved simply through the products and services they sell, or through other measures, such as sustainable manufacturing practices, social action campaigns and similar initiatives designed to improve the world.
Awareness of Purpose + Alignment with Purpose + Impact on Purpose × Active Support

World Value Index Equation
Methodology Open End question

Additionally, in order to better understand the perceived purpose or mission of each brand, we collected 100 responses for each brand for the following question:

Please describe in your own words the purpose or mission as you understand it for each of the following brands.
Audience Segmentation

In addition to rating brands, participants were asked a series of profiling questions ranging from demographics to behavioral and attitudinal characteristics. Using these questions, we identified sub-audiences that represent key consumer groups to better understand these consumers’ views of the brands tested.

### Demographics

<table>
<thead>
<tr>
<th>Sub-audiences</th>
<th>Defining Characteristics</th>
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</thead>
<tbody>
<tr>
<td>Female</td>
<td></td>
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<tr>
<td>Male</td>
<td></td>
</tr>
<tr>
<td>Millennials</td>
<td>Ages 18-34</td>
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<td>Gen X</td>
<td>Ages 35-54</td>
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<tr>
<td>Boomers</td>
<td>Ages 55+</td>
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<tr>
<td>Moms</td>
<td>Women with children under 18 living at home</td>
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<tr>
<td>Dads</td>
<td>Men with children under 18 living at home</td>
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<tr>
<td>Elites</td>
<td>At least college educated, earn $100K+ in personal annual income</td>
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<tr>
<td>Lower Income</td>
<td>Earn less than $50K in personal annual income</td>
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</tbody>
</table>

### Psychographics

<table>
<thead>
<tr>
<th>Sub-audiences</th>
<th>Defining Characteristics</th>
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<tbody>
<tr>
<td>Democrats</td>
<td>Strong or Lean Democrat</td>
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<tr>
<td>Republicans</td>
<td>Strong or Lean Republican</td>
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<tr>
<td>Independents</td>
<td>Identify as an Independent</td>
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<tr>
<td>Active Participation</td>
<td>Those who have recently taken action online or in person on an issue that is important to them</td>
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<tr>
<td>Future Concerned</td>
<td>Concerned with the outlook of the future</td>
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<tr>
<td>Multiculturalists</td>
<td>Those who experiencing other cultures is important to them</td>
</tr>
<tr>
<td>Traditionalists</td>
<td>Those who experiencing other cultures is NOT important to them</td>
</tr>
<tr>
<td>Social &amp; Purpose</td>
<td>Those who regularly post on social media and think it is important to live life with a sense of purpose</td>
</tr>
<tr>
<td>Young &amp; Social</td>
<td>Millennials who regularly post on social media</td>
</tr>
<tr>
<td>Environmental Advocates</td>
<td>Work hard to take steps to protect the environment</td>
</tr>
</tbody>
</table>
Report Summary

The research we conducted in 2016 was designed to understand how people valued brands. This year we set out to further our understanding by gathering more extensive data. This included expanding our audience segments, allowing people to share their own interpretations of brand’s missions, and attitudinal and behavioral questions that speak to the cultural zeitgeist. Given everything happening in the world and in culture, we are excited to share the results of the 2017 World Value Index report with you.

It’s worth reiterating what this index shows: how people perceive a brand’s purpose, how closely it aligns with their own values and is motivating them to purchase, and importantly, whether they would be willing to publicly support the brands’ purpose. In other words, it can be thought of as a measure of how well a brand resonates with what people care about. What it is not: a measure of what “good” the brand is actually doing through its supply chain, employee relations, customer benefit, environmental impact, etc.

World Value Index Findings

The top of the list, similar to last year’s, was an interesting mixture of nonprofits (Goodwill and Girl Scouts of America), brands traditionally associated with purpose (Dove), and brands that provide everyday utility (Amazon and Google). Our newly added open-ended questions on mission helped identify the perception of each brand’s purpose and explain why each brand ranked where it did. Some of these brands, like Amazon and Subway, that may not be seen as typically “mission-driven”, but they rank highly because they provide people with support and necessities in their everyday life.

Much like last year, the bottom of the list is comprised of brands in industries like tobacco, alcohol, and banking, and, again, some of the newer tech brands—Snapchat, Uber and Airbnb—still have some work to do.

Additionally this year, we compare segments against each other, to help identify which brands are the most polarizing among contrasting segments. For example, Starbucks is the brand with the biggest partisan divide - Democrats rank it 86 spots higher than Republicans. Boomers value the older giants—P&G and HP—over Millennials, which place higher value on tech brands like Twitter and Kickstarter. Walmart moves up over 100 spots for lower-income people when contrasted with higher-income and more highly educated people, and Multiculturalists (which we define as those that value experiencing other cultures) see a lot more value in NPR than those who belong to the Traditionalist segment (those who identify as uninterested in experiencing other cultures).

The brands at the top of the list have demonstrated their ability to create value and live up to their purpose, at least in the eyes of everyday Americans, while others positions have fluctuated in the last year and could do more to improve their ranking. One thing is clear, people are increasingly searching for brands with a purpose beyond just making money and it’s something brands can no longer ignore. According to our research 79% of people believe that business can be a positive form of political and social change.

One thing is clear, people increasingly expect that brands can create change and it’s something brands can no longer ignore.
About enso

Enso is a mission-driven creative company. We build mission-driven brands and shared mission initiatives that drive social impact at scale. We were founded five years ago with the belief that the future of marketing is people and brands with shared values working together to drive business success with positive impact. Today, we are leading the paradigm shift from the campaign mindset, traditionally developed by marketers around a brand’s singular mission, to shared mission initiatives, where the ultimate goal is not the success of one organization, but rather the achievement of a mission that serves all stakeholders.

Based in Los Angeles, our client partners include Google, Khan Academy, Atlantis, OfferUp, Omidyar Network, Everytable, and The Nature Conservancy. Through our network of Shared Mission collaborators, enso has built a new framework for collective action and cross-sector solutions to the urgent problems of our time. Recent missions have included rebuilding trust in neighborhoods, creating abundant internet access for everyone, establishing the basic right to literacy, generating wealth by solving the climate crisis, and transforming a mega resort by fostering a flourishing culture and ecology of the entire country it operates in.

If you have any questions or are interested in a deeper dive into a brand or segment, please contact us:

WorldValue@enso.co
World Value Index

2017
TOP 150 BRANDS
Cultural Context

It’s been a year of unexpected firsts. Starting with Brexit. Then President Trump, and the resistance movement to his presidency. Old tensions have surfaced. Notably between globalism and nationalism. And not just along the wedge issues that defined the recent election, like trade, immigration, and foreign policy, but also along socio-economic divides: rural and urban, privilege and poverty, secular and religious. The result? An erosion of social capital and trust in our institutions.

It’s clear that a vast majority of people (89%) see living life with a sense of purpose as important, and see business as having the potential to play a role in that purpose (79%), but most people - a shocking 59% - do not currently trust business leaders to do what’s right. The importance of this gap cannot be overstated—businesses that have lost people’s trust will quickly lose relevance.
<table>
<thead>
<tr>
<th>Rank</th>
<th>Brand Name</th>
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<tbody>
<tr>
<td>01</td>
<td>Goodwill</td>
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<td>02</td>
<td>Girl Scouts of America</td>
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<td>03</td>
<td>Amazon</td>
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<td>04</td>
<td>Save The Children</td>
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<td>05</td>
<td>Google</td>
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<td>06</td>
<td>World Wildlife Fund</td>
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<td>07</td>
<td>YMCA</td>
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<td>08</td>
<td>Microsoft</td>
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<td>09</td>
<td>Dove</td>
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<td>10</td>
<td>Subway</td>
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<td>Home Depot</td>
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<td>12</td>
<td>Kellogg's</td>
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<td>Wal-Mart</td>
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<td>Colgate</td>
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<td>Kraft</td>
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<td>16</td>
<td>Johnson &amp; Johnson</td>
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<td>17</td>
<td>Lowe's</td>
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<td>UPS</td>
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<td>PayPal</td>
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<td>FedEx</td>
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<td>21</td>
<td>McDonald's</td>
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<td>22</td>
<td>Newman's Own</td>
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<td>23</td>
<td>Disney</td>
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<td>24</td>
<td>Samsung</td>
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<td>25</td>
<td>Nestle</td>
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<td>26</td>
<td>Wikipedia</td>
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<td>CVS Pharmacy</td>
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<td>28</td>
<td>Lipton</td>
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<td>29</td>
<td>Proctor &amp; Gamble</td>
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<td>30</td>
<td>Sony</td>
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<td>31</td>
<td>General Electric</td>
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<td>32</td>
<td>LAY'S</td>
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<td>33</td>
<td>Coca-Cola</td>
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<td>34</td>
<td>Whole Foods</td>
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<td>35</td>
<td>Target</td>
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<td>36</td>
<td>Apple</td>
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<td>AAA</td>
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<td>Yoplait</td>
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<td>Facebook</td>
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<td>NIKE</td>
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<td>41</td>
<td>eBay</td>
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<td>42</td>
<td>Ben &amp; Jerry's</td>
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<td>Intel</td>
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<td>Panera</td>
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<td>Pepsi</td>
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<td>Hewlett-Packard</td>
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<td>Trader Joe's</td>
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<td>Ford</td>
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<td>Petfinder</td>
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<td>TOMS</td>
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<td>LEGO</td>
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<td>Chevrolet</td>
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<td>Levi Strauss</td>
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<td>Toyota</td>
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<td>State Farm</td>
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<td>Doritos</td>
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<td>MasterCard</td>
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<td>58</td>
<td>Yahoo</td>
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<td>SunChips</td>
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<td>Honda</td>
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<td>Kroger</td>
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<td>Canon</td>
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<td>63</td>
<td>NBC</td>
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<td>Honest Company</td>
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<td>65</td>
<td>Seventh Generation</td>
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<td>66</td>
<td>Chobani</td>
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<td>67</td>
<td>Annie's Homegrown</td>
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<td>Fitbit</td>
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<td>69</td>
<td>IBM</td>
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<td>70</td>
<td>AT&amp;T</td>
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<td>Adidas</td>
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<td>Etsy</td>
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<td>Verizon</td>
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<td>KIND</td>
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<td>75</td>
<td>Starbucks</td>
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<td>IKEA</td>
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<td>Allstate</td>
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<td>Clif Bar</td>
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<td>L’Oréal</td>
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<td>Southwest Airlines</td>
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<td>Khan Academy</td>
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<td>Unilever</td>
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<td>United Airlines</td>
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<td>Delta Air Lines</td>
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<td>Exxon Mobil</td>
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<td>Barbie</td>
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<td>Boeing</td>
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<td>(RED)</td>
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<td>H&amp;M</td>
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<td>Bank of America</td>
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<td>REI</td>
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<td>LinkedIn</td>
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<td>Cisco</td>
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<td>Caterpillar</td>
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<td>Ralph Lauren</td>
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<td>Axe</td>
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<td>Uber</td>
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<td>Citi</td>
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<td>Lyft</td>
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<td>Spotify</td>
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<td>One Campaign</td>
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<td>Airbnb</td>
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<td>Lululemon</td>
</tr>
<tr>
<td>140</td>
<td>Eileen Fisher</td>
</tr>
<tr>
<td>141</td>
<td>Budweiser</td>
</tr>
<tr>
<td>142</td>
<td>Uniqlo</td>
</tr>
<tr>
<td>143</td>
<td>Coors</td>
</tr>
<tr>
<td>144</td>
<td>Snapchat</td>
</tr>
<tr>
<td>145</td>
<td>Wells Fargo</td>
</tr>
<tr>
<td>146</td>
<td>Heineken</td>
</tr>
<tr>
<td>147</td>
<td>Monsanto</td>
</tr>
<tr>
<td>148</td>
<td>Red Bull</td>
</tr>
<tr>
<td>149</td>
<td>Goldman Sachs</td>
</tr>
<tr>
<td>150</td>
<td>Marlboro</td>
</tr>
</tbody>
</table>
Consumer Purpose Behind Top 10 Brands

*This section features some of the most commonly used words respondents used to describe the brands’ purpose.*
Save The Children

need

kids

countries

world

help

charity

children
World Wildlife Fund

ENDANGERED  PROTECT
WILDLIFE     SAVE
SPECIES      HELP
WORLD       ANIMALS
Subway

SUBS

MAKE

SANDWICHES

GOOD

PEOPLE

FOOD

FAST

HEALTHY
Direct Segment Comparisons

This section of the report compares contrasting segments to identify the most polarizing perception of certain brands.
The Partisan Gap
Democrats vs Republicans

Deep Ideological Divides Play Out In Brand Preference

This past year has been perhaps one of the most politically divisive in history. An unexpected victory in the presidential election, and inflamed tensions between both parties and those who don’t fiercely choose to not belong to one. Increasing levels of participation in marches and protests, and social media echo chambers.

In an age when presidential policies and complex social conversations are aired in 140 characters or less, and narratives morph in real-time to keep up with changing public opinion, it’s no surprise that brands, like Starbucks and Exxonmobil, are getting caught up in the deep division of values and visions of the future. And these brands, as vessels of their values, fall divisively on one side or the other.
Things in this country are heading in the right direction

General Population 42%

Democrats

26%

Republicans

65%
I trust business leaders to do what is right

General Population 41%

Democrats 35%

Republicans 53%

The Partisan Gap

Zeitgeist
I am hopeful for my and my family’s economic prospects for the next five years.

General Population 74%
Experiencing other cultures is important to me
General Population 70%
Democrats 77%
Republicans 59%
# Most Polarizing Brands

<table>
<thead>
<tr>
<th>Democrats</th>
<th>vs.</th>
<th>Republicans</th>
</tr>
</thead>
<tbody>
<tr>
<td>Starbucks</td>
<td>+85</td>
<td>Exxon Mobil</td>
</tr>
<tr>
<td>NPR</td>
<td>+68</td>
<td>Boeing</td>
</tr>
<tr>
<td>NBC</td>
<td>+67</td>
<td>Pfizer</td>
</tr>
<tr>
<td>Ben &amp; Jerry’s</td>
<td>+66</td>
<td>Unilever</td>
</tr>
<tr>
<td>Target</td>
<td>+51</td>
<td>AT&amp;T</td>
</tr>
</tbody>
</table>
Ideological differences between younger and older generations are nothing new. But the widening partisan divide between those hyper-diverse and educated Millennials, who are reshaping the workforce and starting their own families, and their more socially and fiscally conservative Boomer parents, who are aging into retirement with entrenched beliefs and behaviors, are reflected clearly in their brand perceptions. And as Boomers continue to pass their leadership roles onto members of Gen-X, a relatively small generation described as pragmatic and independent, who have considerable spending power and influence over their kids, and are passing their values along to the upcoming Generation Z.

With distinction between age groups growing, brands will have to work to have a relevant mission to those only years apart. And while younger consumers continue to align with purposeful challengers like TOMS and Kickstarter, older audiences still value the enduring giants like Procter & Gamble and AAA.
I seek to buy American when I can
General Population 78%
Creating change in the world is a personal goal of mine that I actively pursue

General Population 54%

68% Millennials

42% Boomers

The Age Gap
Zeitgeist
I have recently taken concrete action (protested in a march, volunteered on a campaign, canvassed a neighborhood for signatures) on an issue that is important to me

General Population 28%

41% Millenials

17% Boomers
## Most Polarizing Brands

<table>
<thead>
<tr>
<th>Millenials</th>
<th>vs.</th>
<th>Boomers</th>
</tr>
</thead>
<tbody>
<tr>
<td>Twitter</td>
<td>+86</td>
<td>Proctor &amp; Gamble +91</td>
</tr>
<tr>
<td>Starbucks</td>
<td>+86</td>
<td>Hewlett-Packard +81</td>
</tr>
<tr>
<td>Spotify</td>
<td>+84</td>
<td>Newman’s Own +74</td>
</tr>
<tr>
<td>Kickstarter</td>
<td>+78</td>
<td>Pfizer +71</td>
</tr>
<tr>
<td>Always</td>
<td>+70</td>
<td>AAA +66</td>
</tr>
</tbody>
</table>
Direct Segment Comparisons

The American Dream looks very different today than it has for generations. For one thing, the middle class, not long ago considered the economic majority and a national symbol for opportunity, is shrinking, quickly. At the same time, the rich are getting richer, faster. The vast majority of Americans facing rising costs of housing, college, and healthcare, are struggling to find stability, let alone upward mobility.

The result of this growing inequality? We’re more economically divided than ever before. So it’s not surprising that many brands, from the broad and accessible like Walmart and McDonalds to the aspirational and niche like American Express and Patagonia, are becoming more polarizing to consumers on both ends of the income spectrum.

The Income Gap

Elites vs Lower Income

Income levels can influence the definition of purpose
I trust business leaders to do what is right

General Population 41%

Elites 50%

Lower Income 38%

The Income Gap
Zeitgeist
Direct Segment Comparisons

I feel able to affect the world around me

General Population 57%

Elites

Zeitgeist

The Income Gap

Lower Income

51%
Things in this country are heading in the right direction

General Population 42%

Elites 49%

Lower Income 38%

The Income Gap
Zeitgeist
<table>
<thead>
<tr>
<th>The Income Gap</th>
<th>62% Elites</th>
</tr>
</thead>
<tbody>
<tr>
<td>Zeitgeist</td>
<td></td>
</tr>
</tbody>
</table>

Creating change in the world is a personal goal of mine that I actively pursue

General Population 54%

48% Lower Income
I actively support (with money or time) nonprofits or causes working on issues I care about.

General Population 61%

77% Elites

53% Lower Income
I have recently taken concrete action (protested in a march, volunteered on a campaign, canvassed a neighborhood for signatures) on an issue that is important to me.

General Population 28%

Elites 43%

Lower Income 21%
### Most Polarizing Brands

<table>
<thead>
<tr>
<th>Lower Income</th>
<th>vs.</th>
<th>Elites</th>
</tr>
</thead>
<tbody>
<tr>
<td>Wal-Mart</td>
<td>+106</td>
<td>Patagonia</td>
</tr>
<tr>
<td>LAY’S</td>
<td>+100</td>
<td>Khan Academy</td>
</tr>
<tr>
<td>Ebay</td>
<td>+76</td>
<td>American Express</td>
</tr>
<tr>
<td>McDonald’s</td>
<td>+74</td>
<td>Trader Joe’s</td>
</tr>
<tr>
<td>Coca-Cola</td>
<td>+67</td>
<td>Starbucks</td>
</tr>
</tbody>
</table>
Direct Segment Comparisons

Across the world competing forces of globalism and nationalism have clashed. Slogans like Make America Great Again and Choose France have adorned presidential debate stages and social media streams. Brexit and Trump both won on a message of nationalism, while Netherlands and France, though confronting it in their highest elections, chose to reject the rising wave of nationalism and reaffirm their commitment to a better, collective world, together.

At the core of this constantly expanding and contracting world is a shifting sense of identity, and what it means to be both a citizen of a country and a citizen of the world. Among those who seek to experience other cultures, NPR and Uber resonate more clearly, while McDonald’s and Marlboro are valued more with those who are comfortable prioritizing their own culture. Brands that hedge between these values may avoid alienating consumers who are motivated by fear and isolationism, but as the cultural conversation becomes more volatile, staying silent creates a different kind of risk in standing for nothing.

The Cultural Gap

Democrats vs Republicans
Millenials vs Boomers
Multiculturalists vs Traditionalists
Experiencing other cultures is important to me

General Population 70%

Millenials

64% Boomers

The Cultural Gap

Zeitgeist
Experiencing other cultures is important to me
General Population 70%

Democrats 77%

Republicans 59%
Creating change in the world is a personal goal of mine that I actively pursue

General Population 54%

The Cultural Gap
Zeitgeist

78% Multiculturalists

30% Traditionalists
I work hard in my own life to take steps to protect the environment.

General Population 73%

88% Multiculturalists

55% Traditionalists
I feel able to affect the world around me

General Population 57%

Multiculturalists 74%

Traditionalists 39%
# Most Polarizing Brands

<table>
<thead>
<tr>
<th>Multiculturalists</th>
<th>vs.</th>
<th>Traditionalists</th>
</tr>
</thead>
<tbody>
<tr>
<td>NPR</td>
<td>+78</td>
<td>McDonald’s</td>
</tr>
<tr>
<td>Starbucks</td>
<td>+76</td>
<td>Unilever</td>
</tr>
<tr>
<td>Uber</td>
<td>+69</td>
<td>Marlboro</td>
</tr>
<tr>
<td>Trader Joe’s</td>
<td>+65</td>
<td>Chevrolet</td>
</tr>
<tr>
<td>Ben &amp; Jerry’s</td>
<td>+53</td>
<td>Doritos</td>
</tr>
</tbody>
</table>
Biggest Movers For Each Segment

This section of the report shows the biggest movers, both in the positive and negative directions, for each segment compared to General Population. This shows the brands that each segment perceives offer the most value outside of making money compared to the general population.
Biggest Movers Compared to General Population

Female ↑

- Always +42
- L’Oréal +26
- Honest Company +23
- Barbie +19
- Seventh Generation +17
- Etsy +20
- Lyft +21
- Petfinder +27
- Ben & Jerry’s/Chobani
Biggest Movers Compared to General Population

Female

-31

-27

Intel

Coca-Cola

Ford

Patagonia

Caterpillar

Levi Strauss

Chevron

-31

-27

-23

-20

-19

-17

-16

Wikipedia / Pepsi / IBM
Biggest Movers Compared to General Population

Male

- Tesla (+27)
- Budweiser (+26)
- Intel (+25)
- ESPN (+24)
- Chevron (+23)
- Caterpillar (+20)
- Boeing
- REI
- IBM
- Ford

Overall, these companies have experienced significant increases in interest compared to the general population.
Biggest Movers Compared to General Population

Male

Starbucks: -35
Ben & Jerry’s: -30
Panera: -28
Honest Company: -24
Petfinder: -21

Female

Always: -59
Barbie: -31
Etsy: -25
Seventh Generation: -30
L’Oréal: -21

Note: The values indicate the percentage change compared to the general population.
Biggest Movers Compared to General Population

Millenials ↗

- Spotify: +67
- Snapchat: +65
- Kickstarter: +59
- Always
- Etsy
- Twitter
- Starbucks
- Uber: +49
- Fitbit
- Chipotle: +41, +42
Millenials ↓

Biggest Movers Compared to General Population

- Pfizer: -43
- LAY’S: -48
- Samsung: -50
- General Electric: -53
- Lowe’s: -53
- AAA: -57
- Lipton: -59
- Newman’s Own: -74
- Hewlett-Packard: -74
- Proctor & Gamble: -74
Biggest Movers Compared to General Population

- Coors
- Audi
- Budweiser
- LinkedIn
- Morgan Stanley
- Levi Strauss
- SunChips
- American Express
- Airbnb
- Lipton

Gen X 🔺

+33  +24  +22

+16  +17  +18  +19
Biggest Movers Compared to General Population

Gen X

-33

H&M

Chase Bank

Boeing

Uber

Kickstarter

AT&T

Bank of America

Venmo

United Airlines

always

-14

-19

-26

-33

-16

-17
Biggest Movers Compared to General Population

Boomers

Marlboro +65

Boeing +28

Pfizer

Exxon Mobil

Chase Bank / Time Warner

Hewlett-Packard / Chevrolet

Venmo

ESPN +18 +20 +22 +23 +24

+29
Biggest Movers Compared to General Population

Boomers

Starbucks / Method

Boomers ➣

Target

Pandora

Barbie

Wikipedia

TOMS

Twitter

Barbie

-39

-35

-28

-29

-21

-22

-20

-36
Biggest Movers Compared to General Population

- Always: +68
- Pampers: +54
- Wells Fargo: +50
- Honest Company: +43
- Barbie: +34
- Starbucks: +30
- Zappos / Snapchat: +31
- L’Oréal: +27
- Yoplait: +35

Moms ↑
Biggest Movers Compared to General Population

Moms

- SolarCity / Patagonia -57
- Home Depot -42
- General Electric -35
- AAA -34
- Intel -33
- Ford -31
- Trader Joe’s -28

Trader Joe’s

Ford

Home Depot

Intel

General Electric

AAA

SolarCity / Patagonia

-57

-31

-33

-34-35

-42
Biggest Movers Compared to General Population

Dads ➰

- Audi: +60
- Red Bull: +53
- Axe: +51
- Volkswagen: +48
- Doritos / Pampers / Tesla: +45
- Citi / Coors: +42
- Allstate: +43
Biggest Movers Compared to General Population

- Etsy/Starbucks: -39
- Honest Company: -42
- NPR: -45
- Canon: -47
- Panera: -51
- Yoplait: -55
- Seventh Generation: -65
- Petfinder: -67
- Always: -67

Dads ↓
Biggest Movers Compared to General Population

- Patagonia: +66
- Khan Academy: +57
- Chobani: +52
- Starbucks: +47
- American Express: +43
- American Airlines
- Morgan Stanley: +41
- Trader Joe’s: +41
- (RED)
- Annie’s Homegrown: +36

Elites →
Biggest Movers Compared to General Population

- Chevrolet
- AT&T
- UPS
- FedEx
- Kraft
- Coca-Cola
- McDonald's
- Ebay
- LAY’S
- Wal-Mart

Elites ➔
Biggest Movers Compared to General Population

Low Income ➪

- Barbie: +15
- Yahoo: +14
- NBC Always Pandora Axe: +13
- Chevrolet Time Warner Audi: +12
- Pepsi: +11
Biggest Movers Compared to General Population

-12

Low Income ➣
Biggest Movers Compared to General Population

Democrats ↑

Starbucks +57

NBC +42

NPR +31

One Campaign +28

Ben & Jerry’s +25

SunChips/VICE +21 +23

Target +29

SolarCity / Lyft

Democrats ↓

Democrats
Biggest Movers Compared to General Population

Democrats

Chevrolet -20
Caterpillar -29
Pepsi -28
Ebay -24
Coca-Cola -23
Chase Bank -20
Boeing -29
Wal-Mart -24
McDonald's -28
Exxon Mobil -23

Democrats
Biggest Movers Compared to General Population

- Republicans
  - Caterpillar
  - Boeing / Chevron
  - AT&T
  - Unilever
  - Exxon Mobil
  - Pfizer
  - Coors
  - Wells Fargo

+21
+22
+23
+28
+29
+33
+34
+35
+36
Biggest Movers Compared to General Population

Republicans

- Spotify
- Method
- NBC / Tesla
- Target
- Starbucks
- SolarCity
- Seventh Generation
- NPR
- Ben & Jerry's

Republican's sentiment is shown with numbers: -20, -21, -25, -28, -32, -37, -38.
Biggest Movers Compared to General Population

Independents

Volkswagen

KIND

Budweiser

Medium

H&M

Intel/TOMS/LEGO/LinkedIn

Seventh Generation

+45

+29

+27

+19

+16 +17

+20
Biggest Movers Compared to General Population

- CVS Pharmacy: -29
- Barbie: -28
- Pandora: -24
- Pfizer: -22
- LAY’S: -18
- Colgate (RED): -17
- NBC: -16
- Ben & Jerry’s: -16
- Uber: -17

Independents
Active Participants

Biggest Movers Compared to General Population

- NPR
- Starbucks
- IBM / Twitter
- Etsy
- Tesla
- Method
- Spotify
- Kickstarter
- VICE

+76
+60
+58
+53
+51
+49
+45
+43
+54
Biggest Movers Compared to General Population

Active Participants

Johnson & Johnson
-83

McDonald’s Coca-Cola
-51

Samsung

NIKE

AAT / Fitbit

AAA / Pepsi

Home Depot
-42 - 44
Biggest Movers Compared to General Population

Future Concerned

- Petfinder: +22
- Lyft: +20
- Twitter: +18
- Trader Joe's: +15
- Seventh Generation: +14
- Snapchat: +13
- Geico: +14
- VICE: +14
- Uber: +13
- Spotify: +13
Biggest Movers Compared to General Population

Future Concerned

- Boeing: -14
- AT&T: -16
- Chevron: -16
- Ford: -17
- Levi Strauss: -17
- Exxon Mobil: -18
- McDonald's: -19
- NIKE: -19
- Bank of America: -21
- Cisco: -21
Biggest Movers Compared to General Population

- Multiculturalists

- Starbucks: +46
- Uber: +38
- TOMS: +34
- Trader Joe’s: +30
- Clif Bar: +27
- NPR: +35
- SunChips: +25
- The North Face: +28
- Snapchat: +35
- Ben & Jerry’s: +25
Multiculturalists

Biggest Movers Compared to General Population

- McDonald's: -54
- Wal-Mart: -41
- Exxom Mobil: -36 -37
- Time Warner: -35
- Pepsi: -29 -26 -27
- Chevrolet/Doritos: -27
- Chase Bank: -26
- General Electric/Unilever: -29
Biggest Movers Compared to General Population

Traditionalists

- Marlboro: +62
- Unilever: +39
- Uniqlo: +34
- Morgan Stanley: +30
- Monsanto: +27
- Eileen Fisher/Goldman Sachs: +24
- Cisco: +25
- Chevrolet/Salesforce.com: +23

Pag 88
Biggest Movers Compared to General Population

- Traditionalists

- NPR
- Chipotle
- Virgin
- Starbucks
- Trader Joe’s
- Uber
- Ben & Jerry’s
- REI

- BMW
- Target

-48
-39
-32
-31
-28
-26
-37
-33
-31
Biggest Movers Compared to General Population

Social & Purpose

+54

+28

Geico

Audi

Twitter

T-Mobile / Snapchat

Canon / Citi / OfferUp
Biggest Movers Compared to General Population

Social & Purpose

- Boeing: -23
- AAA: -25
- Johnson & Johnson: -26
- Kickstarter / Barbie / REI: -28
- SolarCity: -30
- Exxon Mobil: -33
- NPR: -30
- Proctor & Gamble: -37
Biggest Movers Compared to General Population

Young & Social

- Spotify: +97
- Snapchat: +83
- Twitter: +60
- Uber: +48
- AT&T: +44
- H&M / Lyft: +49
- Adidas: +62
- Always: +64
- Red Bull: +99
Biggest Movers Compared to General Population

- Proctor & Gamble: -86
- General Electric: -75
- Newman’s Own: -66
- Lowe’s: -58
- Exxon Mobil: -52
- Johnson & Johnson: -48
- YMCA: -45
- AAA: -42
- Samsung: +76
- Hewlett-Packard: +76
- Proctor & Gamble: +76

Young & Social
Biggest Movers Compared to General Population

Environmental Advocates

- Seventh Generation: +43
- TOMS: +32
- Twitter: +30
- Ben & Jerry’s: +28
- Spotify: +26
- One Campaign: +24
- Whole Foods: +23
- VICE: +22
- IBM: +21

Other companies are not listed in the image.
Biggest Movers Compared to General Population

-50

-50

-35

-30

-27

-24

Chevron
General Electric
Chevrolet

Pepsi / Yahoo

Time Warner

Bank of America

McDonald’s / Ford

Exxon Mobil

Environmental Advocates
Purpose Motivation Index

Equation

\[
\text{Purpose Motivation Index} = \frac{\text{Awareness of Purpose}}{\text{Active Support}}
\]

For each of the following, please indicate how likely you would be to openly support an effort to advance its core purpose or mission.

For each of the following, please indicate how aware you are, or not, of its purpose or mission (beyond just making money).

The Purpose Motivation Index measures of the people who can identify a purpose of a brand, how many are willing to publically support it.
The World Value Index measures people's perception of a brand's purpose while the Purpose Motivation Index measures the intensity of willingness to support it.
Thank You

If you have any follow up questions or would like for a detailed report on your brand, please contact us at worldvalue@enso.co