

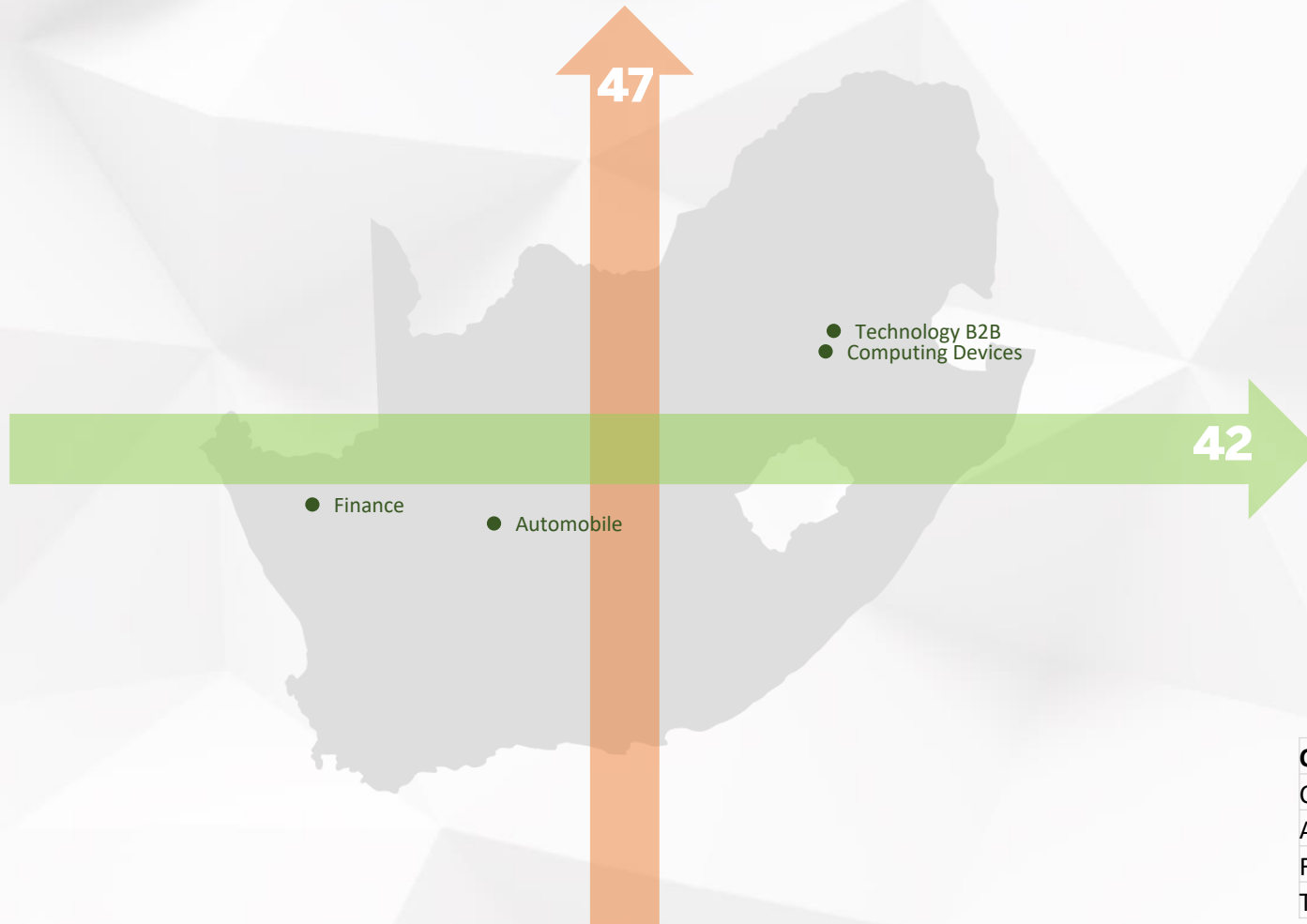
# BRANDS IN ***MOTION***

South Africa



# BRANDS IN *MOTION*

SOUTH AFRICA



Category	Emotional	Rational
Computing Devices	51.8	51.4
Automobile	37.4	41.9
Finance	29.6	43.0
Technology B2B	52.1	52.6

South Africa's Adjusted Axis Points: 47 Rational, 42 Emotional based on average responses to category level drivers.



# COMPUTING DEVICES

## CATEGORY DEFINED

**Computing Devices:** Including laptop or desktop computers, tablets, smartphones, 2-in-1 convertible laptops, and related software or hardware.



# MOVER ACROSS ALL MARKETS

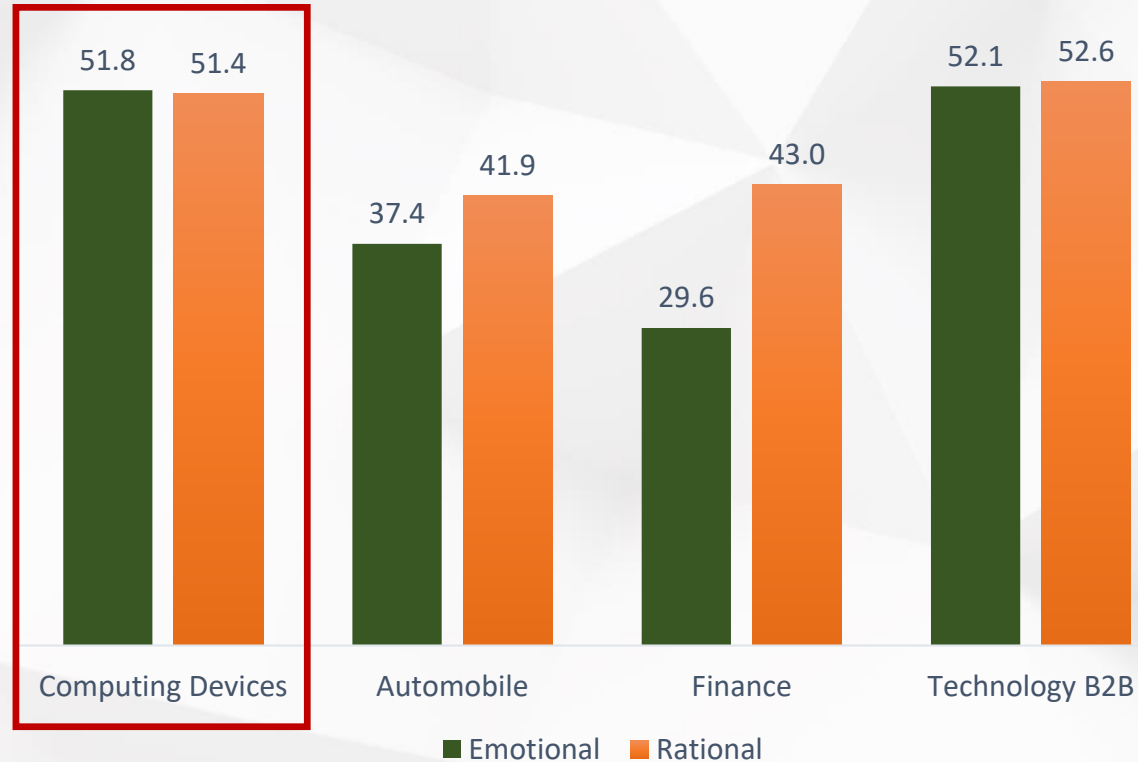


# COMPUTING DEVICES

## CATEGORY COMPARISON

### Observations:

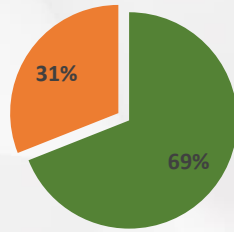
- Category had an average emotional response of 51.8, which was the second highest average amongst categories surveyed.
- Category had an average rational response of 51.4, which was again the second highest average amongst categories surveyed.



# COMPUTING DEVICES

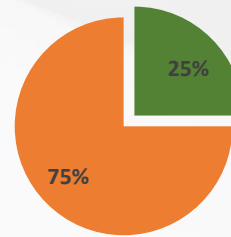
## EMOTIONAL DRIVERS

### Defend/Shame



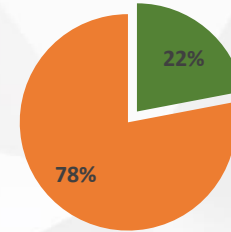
■ Join in the public shaming ■ Defend to the bitter end

### Experience



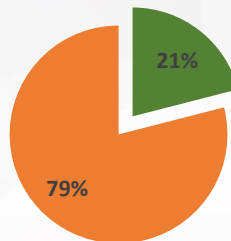
■ Completely miserable ■ It's a pleasure

### Disappeared



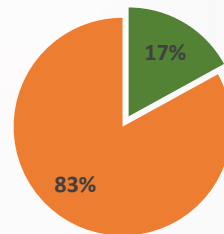
■ Good Riddance ■ I need it back!

### Love/Hate



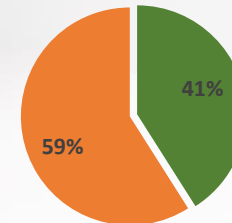
■ Hate them ■ Love them

### Overall Impression



■ It is the worst ever ■ It is amazing

### Social Impact



■ Does harm ■ Out for Common good

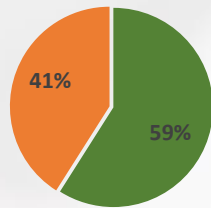
\*Percentages represent the percent of respondents who responded above or below the average emotional score by category driver.



# COMPUTING DEVICES

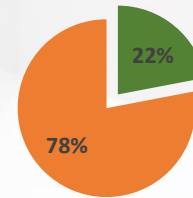
## RATIONAL DRIVERS

### Executive Behaviour



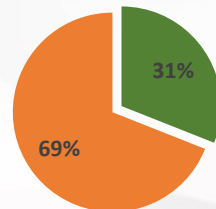
■ Strong influence ■ Not influence at all

### Innovation



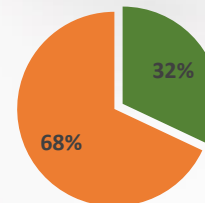
■ Stuck in the stone age ■ Cutting Edge

### Necessary



■ Have no need for them ■ Can't live without them

### Intent to Purchase



■ No way ■ Absolutely plan to purchase

\*Percentages represent the percent of respondents who responded above or below the average rational score by category driver.



AUTOMOTIVE

## CATEGORY DEFINED

**AUTOMOTIVE:** Including cars, trucks, motorcycles, or other motorized mode of transportation as well as the technologies and in-dash services within the vehicle.





# SURVIVOR ACROSS ALL MARKETS

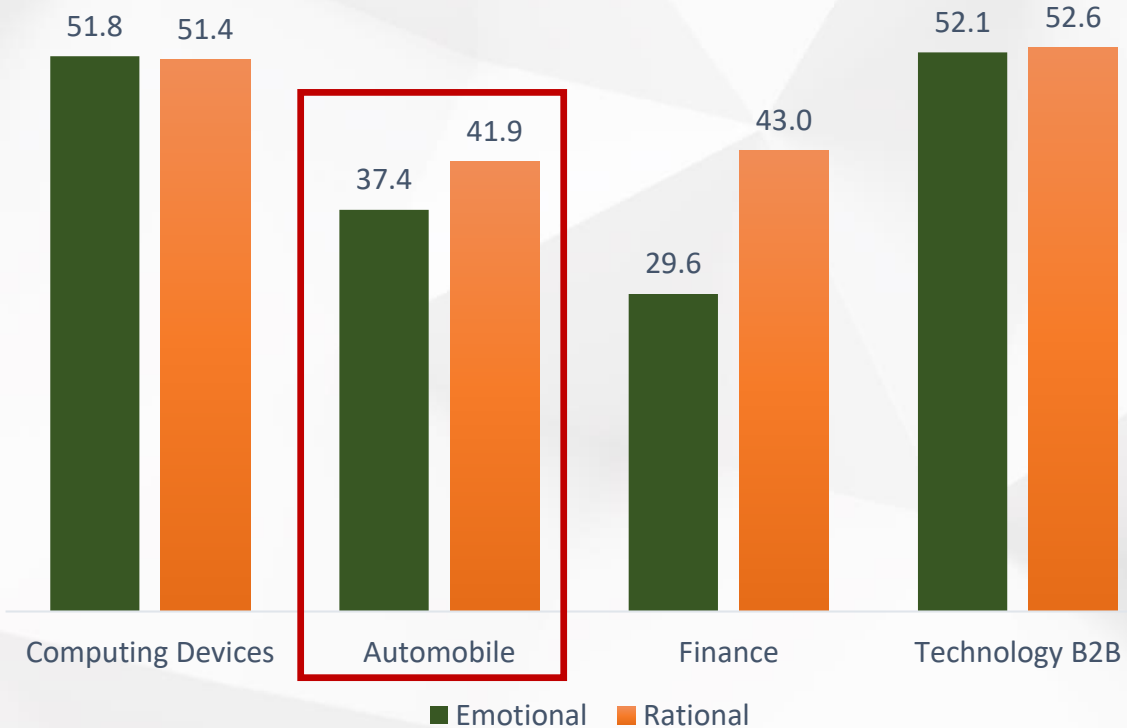


# AUTOMOTIVE

## CATEGORY COMPARISON

### Observations:

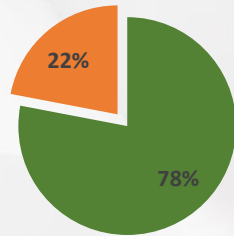
- Category had an average emotional response of 37.4, which was the second lowest average amongst categories surveyed.
- Category had an average rational response of 41.9, which was again the second lowest average amongst categories surveyed.



# AUTOMOTIVE

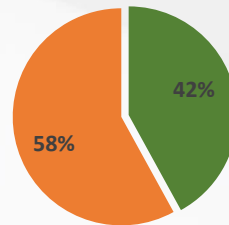
# EMOTIONAL DRIVERS

### Defend/Shame



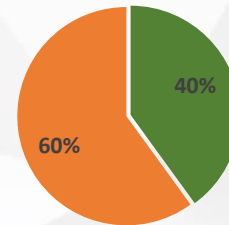
■ Join in the public shaming ■ Defend to the bitter end

### Experience



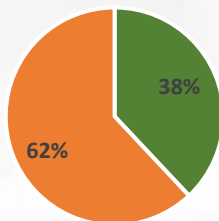
■ Completely miserable ■ It's a pleasure

### Disappeared



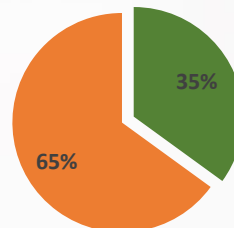
■ Good Riddance ■ I need it back!

### Love/Hate



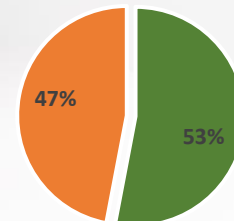
■ Hate them ■ Love them

### Overall Impression



■ It is the worst ever ■ It is amazing

### Social Impact



■ Does harm ■ Out for Common good

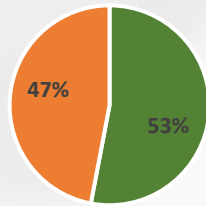
\*Percentages represent the percent of respondents who responded above or below the average emotional score by category driver.



# AUTOMOTIVE

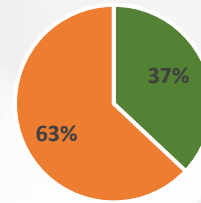
# RATIONAL DRIVERS

## Executive Behaviour



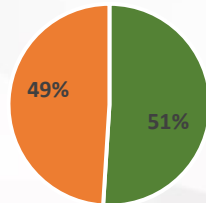
■ Strong influence ■ Not influence at all

## Innovation



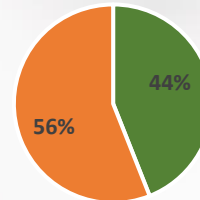
■ Stuck in the stone age ■ Cutting Edge

## Necessary



■ Have no need for them ■ Can't live without them

## Intent to Purchase



■ No way ■ Absolutely plan to purchase

\*Percentages represent the percent of respondents who responded above or below the average rational score by category driver.



# FINANCE & BANKING

## CATEGORY DEFINED

**Finance/Banking Products:** Financial products and services including bank accounts, credit cards, money management, investments, mortgages, personal loans and mobile payment methods.



# DEFENDER/SURVIVOR ACROSS ALL MARKETS

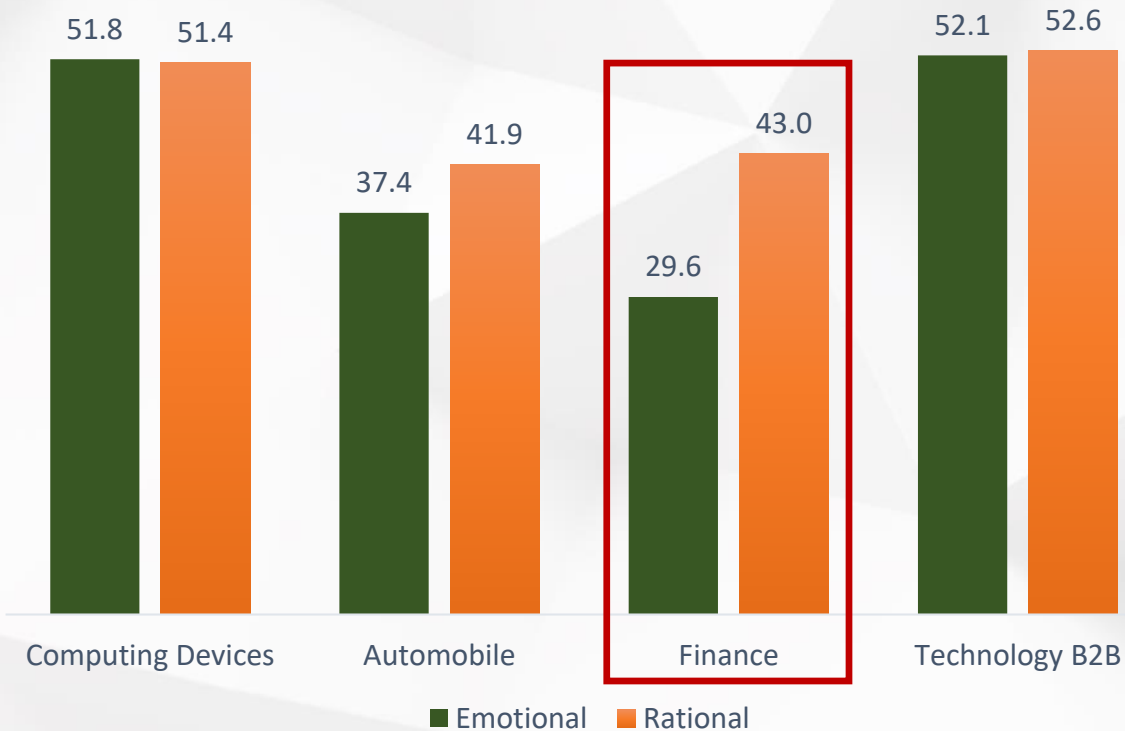


# FINANCE/BANKING

## CATEGORY COMPARISON

### Observations:

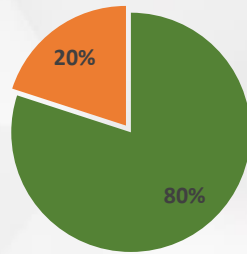
- Finance/Banking received the lowest average emotional response of all the categories surveyed in this market.
- Category had an average rational response of 43.0, which was the second lowest of any category surveyed.



# FINANCE/BANKING

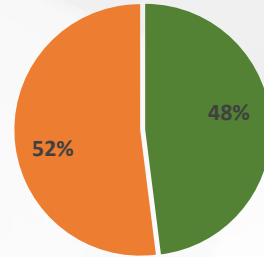
## EMOTIONAL DRIVERS

### Defend/Shame



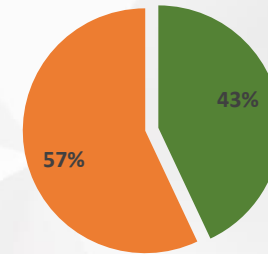
■ Join in the public shaming ■ Defend to the bitter end

### Experience



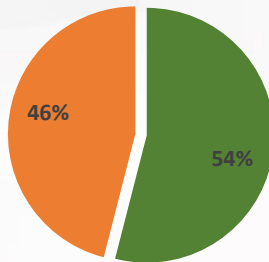
■ Completely miserable ■ It's a pleasure

### Disappeared



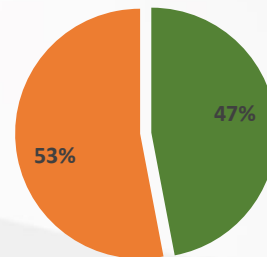
■ Good Riddance ■ I need it back!

### Love/Hate



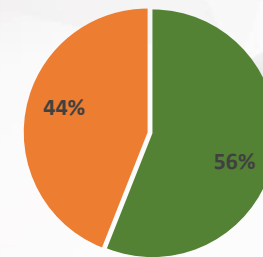
■ Hate them ■ Love them

### Overall Impression



■ It is the worst ever ■ It is amazing

### Social Impact



■ Does harm ■ Out for Common good

\*Percentages represent the percent of respondents who responded above or below the average emotional score by category driver.

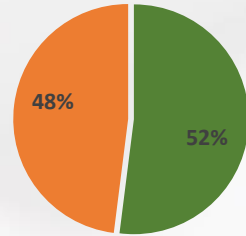




# FINANCE/BANKING

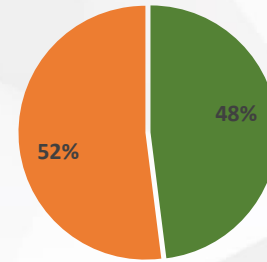
## RATIONAL DRIVERS

Executive Behaviour



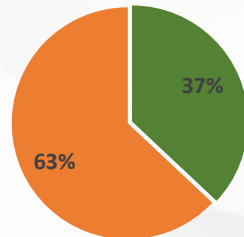
■ Strong influence ■ Not influence at all

Innovation



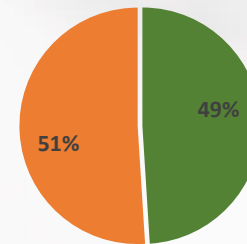
■ Stuck in the stone age ■ Cutting Edge

Necessary



■ Have no need for them ■ Can't live without them

Intent to Purchase



■ No way ■ Absolutely plan to purchase

\*Percentages represent the percent of respondents who responded above or below the average rational score by category driver.



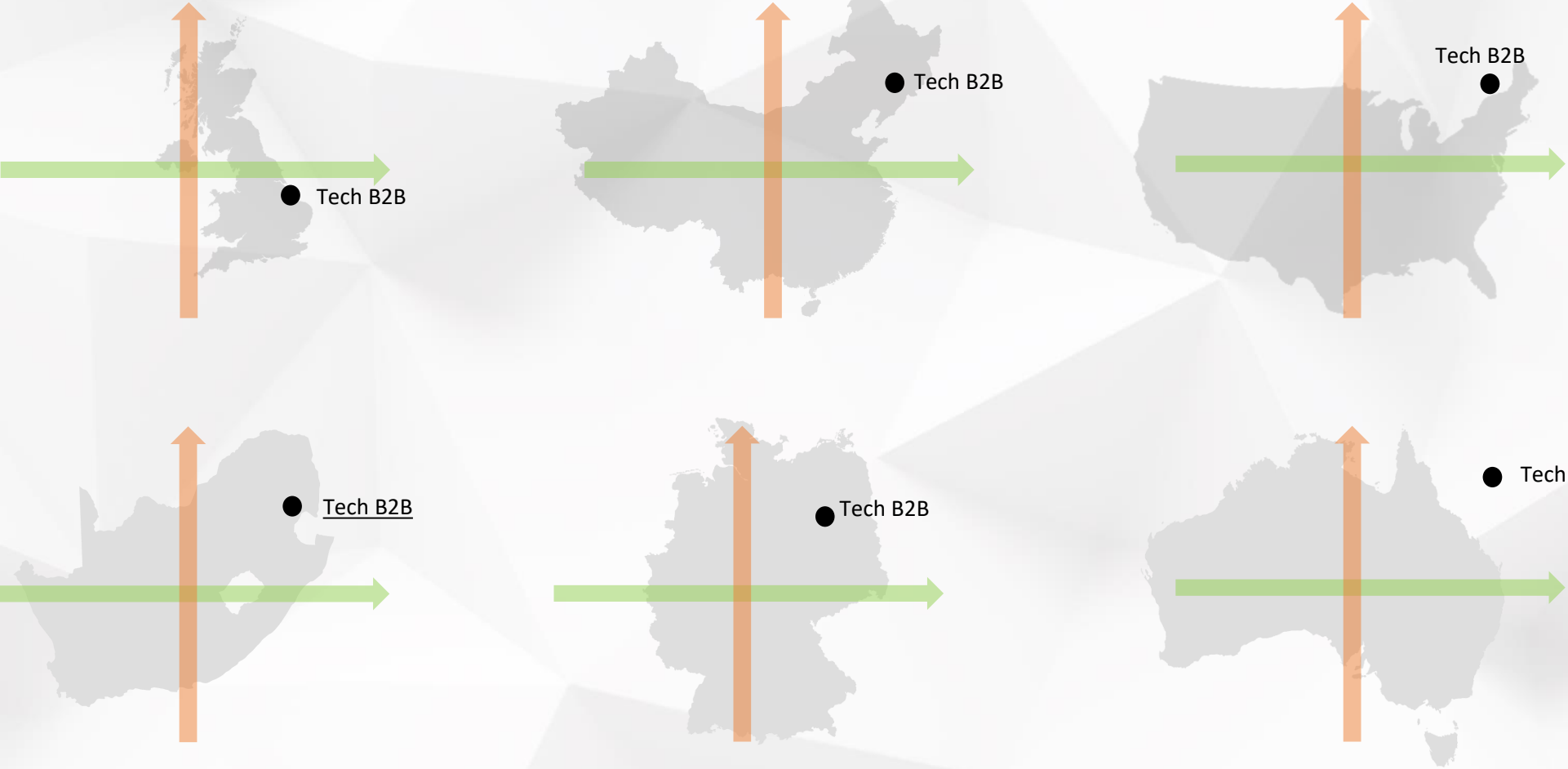
# TECHNOLOGY B2B

## CATEGORY DEFINED

**Business Technology Solutions:** Including server, networking, data or storage solutions; software; desktop or laptop computers; smartphones, tablets or other mobile devices; cybersecurity or identity management products and services; business analytics or data analysis solutions; and specialized industry technologies (programmable machines, networking solutions, Internet of Things).



# MOVER IN SOUTH AFRICA

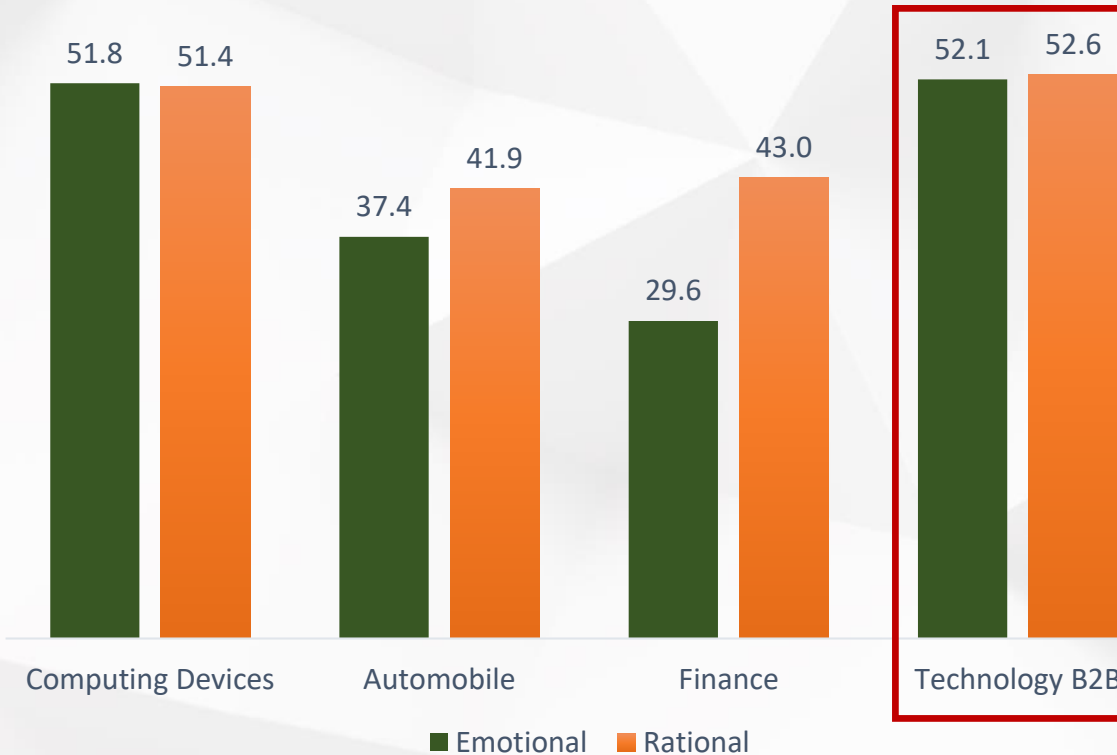


# TECH B2B

## CATEGORY COMPARISON

### Observations:

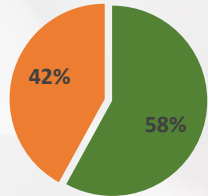
- Tech B2B Category received the highest average emotional and rational responses of any category surveyed in this market.
- Similar averages between emotional and rational drivers.



# TECHNOLOGY B2B

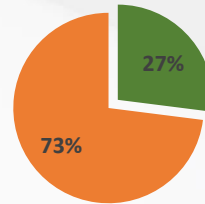
## EMOTIONAL DRIVERS

### Defend/Shame



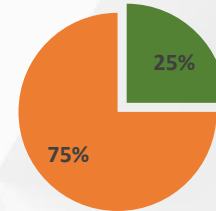
■ Join in the public shaming ■ Defend to the bitter end

### Experience



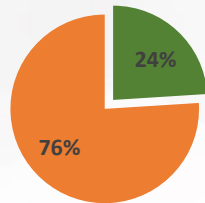
■ Completely miserable ■ It's a pleasure

### Disappeared



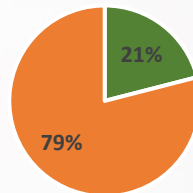
■ Good Riddance ■ I need it back!

### Love/Hate



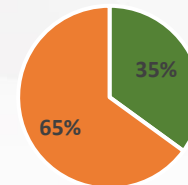
■ Hate them ■ Love them

### Overall Impression



■ It is the worst ever ■ It is amazing

### Social Impact



■ Does harm ■ Out for Common good

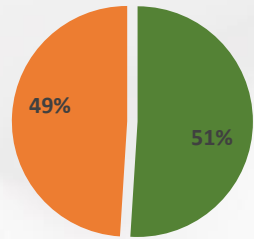
\*Percentages represent the percent of respondents who responded above or below the average emotional score by category driver.



# TECHNOLOGY B2B

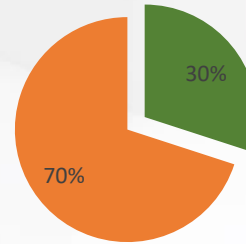
## RATIONAL DRIVERS

Executive Behaviour



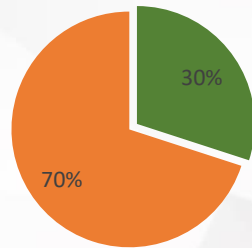
■ Strong influence ■ Not influence at all

Innovation



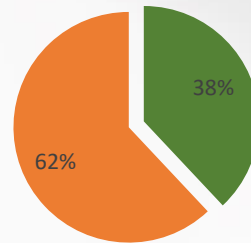
■ Stuck in the stone age ■ Cutting Edge

Necessary



■ Have no need for them ■ Can't live without them

Intent to Purchase



■ No way ■ Absolutely plan to purchase

\*Percentages represent the percent of respondents who responded above or below the average rational score by category driver.



# BRANDS IN ***MOTION***

APPENDIX



# Four Realities

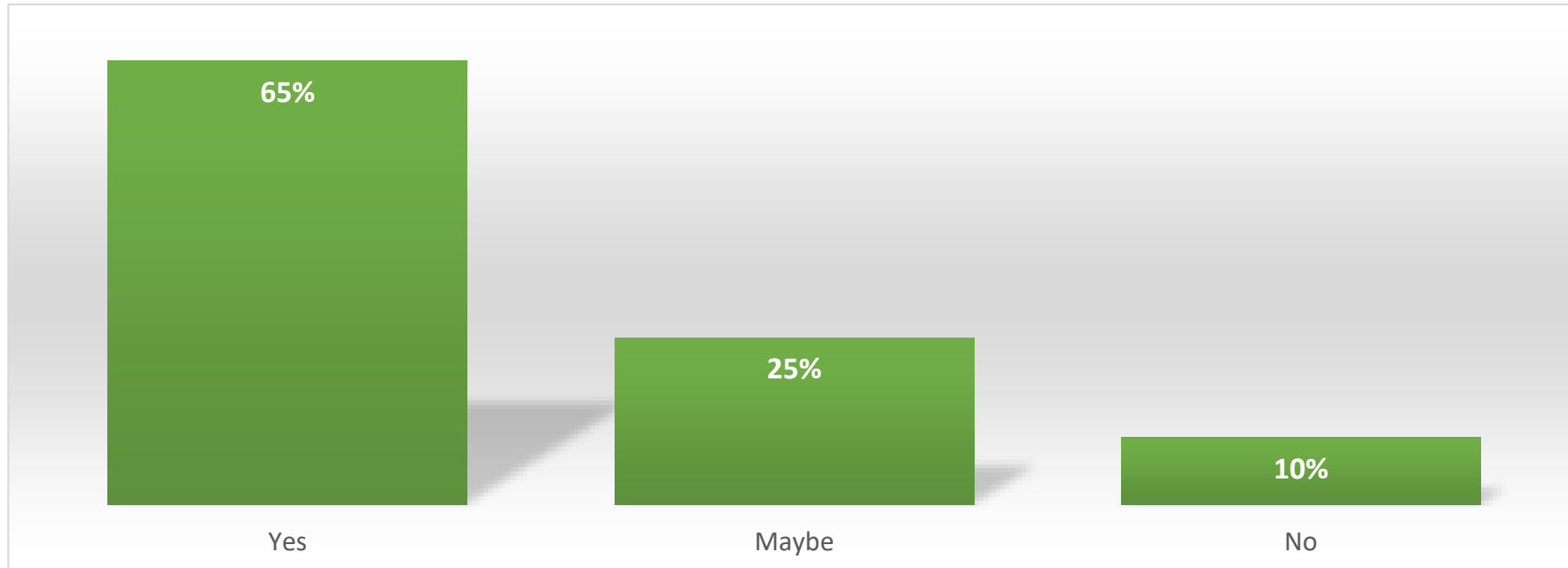
Brand motion is built from the truth that neither your brand, your customers, nor anything in your environment is static and it is from this environment that our study has defined 4 realities.





# Reality #1: Stability is an element of motion

“In a climate of uncertainty, do brands/businesses have the capability to provide stability?”



**90% of the 3783 respondents in South Africa believe that Business/Brands *may* have the CAPABILITY to provide stability. (China 89%, UK 75%, US 81%, AU 83%)**

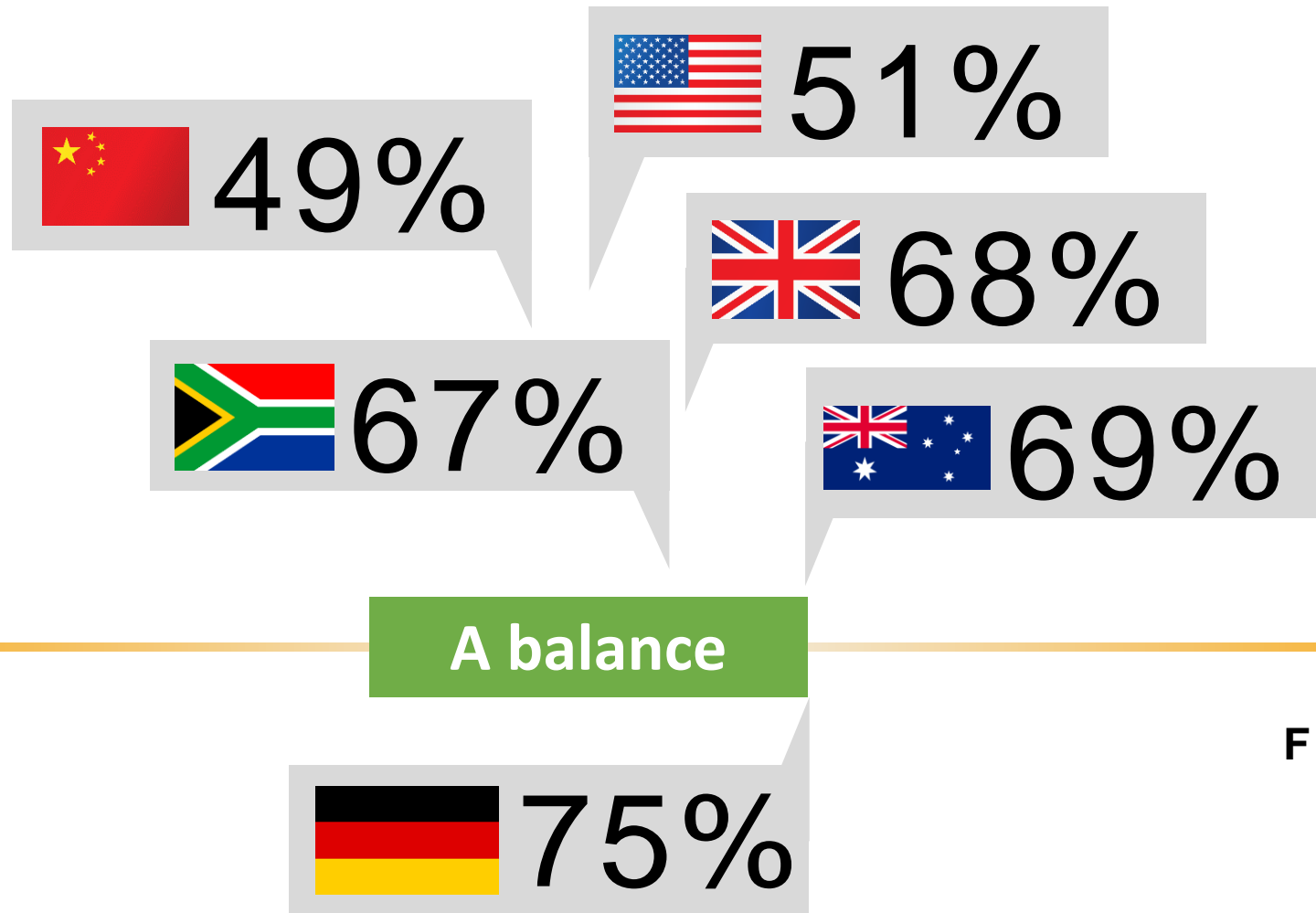


# Reality #2: Cutting-edge is transcendent

Survey question: How innovative are [category] companies? Stuck in the stone age or cutting-edge?



# Reality #3: The Unilever effect



PURPOSE

FUNCTIONALITY



# Reality #4: Love you today, shame you tomorrow

LOVE VS. HATE



However

DEFEND VS. SHAME



# Media Questions

Who is responsible, capable, and expected as it relates to stability

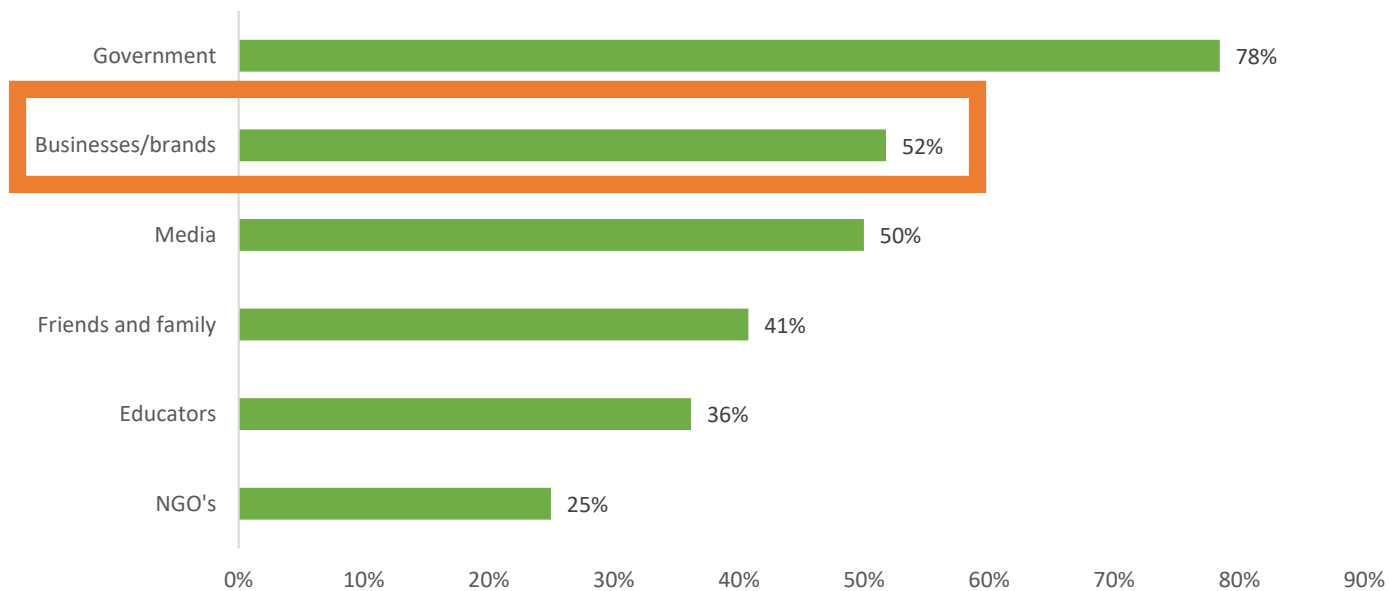


## Media Question (M1)

Who is responsible for stability?

“During uncertain times, who do you think is responsible to create stability?”

1. Business/Brands 2. Government 3. Friends and Family 4, Educators 5. Media 6. NGO's



**52% of the 3783 respondents believe that Business/Brands are RESPONSIBLE for creating stability.**

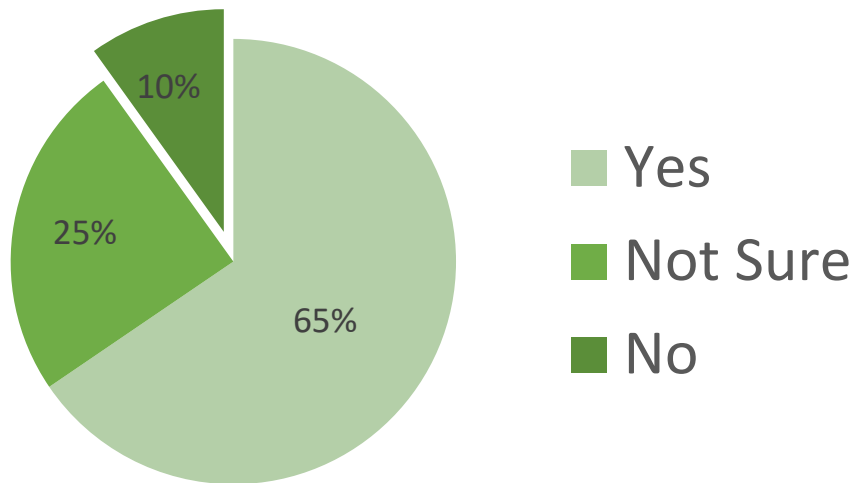


## Media Question (M2)

Can brands provide stability?

“In a climate of uncertainty, do brands/businesses have the capability to provide stability?”

1. Yes 2. No 3. Not Sure



90% of the 3783 respondents believe that Business/Brands may have the CAPABILITY to provide stability.

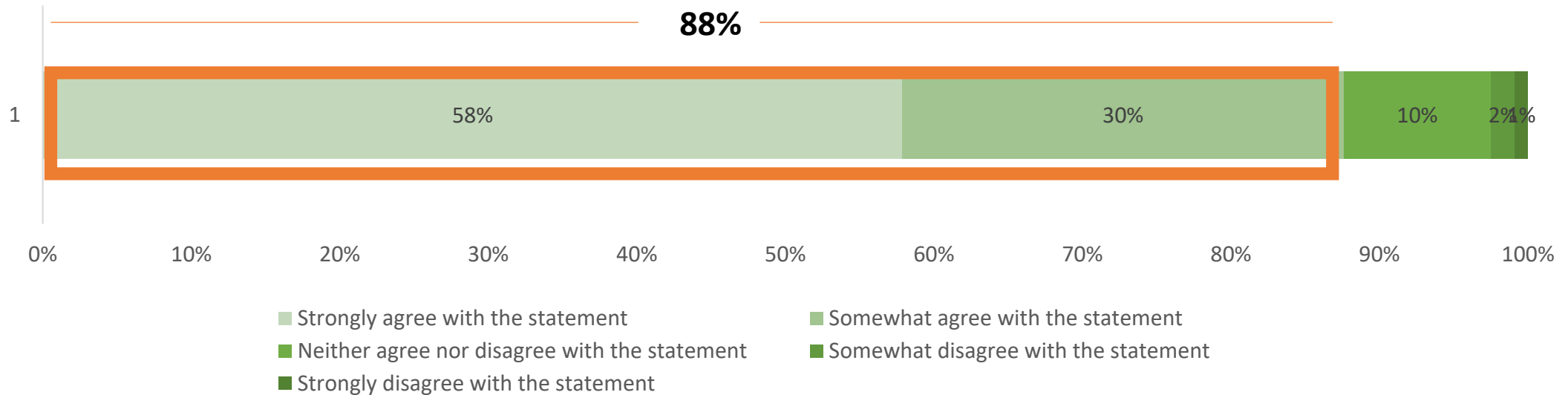


## Media Question (M3)

Should brands take a stand?

“How much do you agree with the statement...? I expect brands to take a stand on important issues.”

1. Strongly agree, 2. Somewhat agree, 3. Neither agree nor disagree, 4. Somewhat disagree, 5. strongly disagree



**88% of the 3783 respondents either strongly or somewhat agree that they EXPECT brands to take a stand on important issues.**



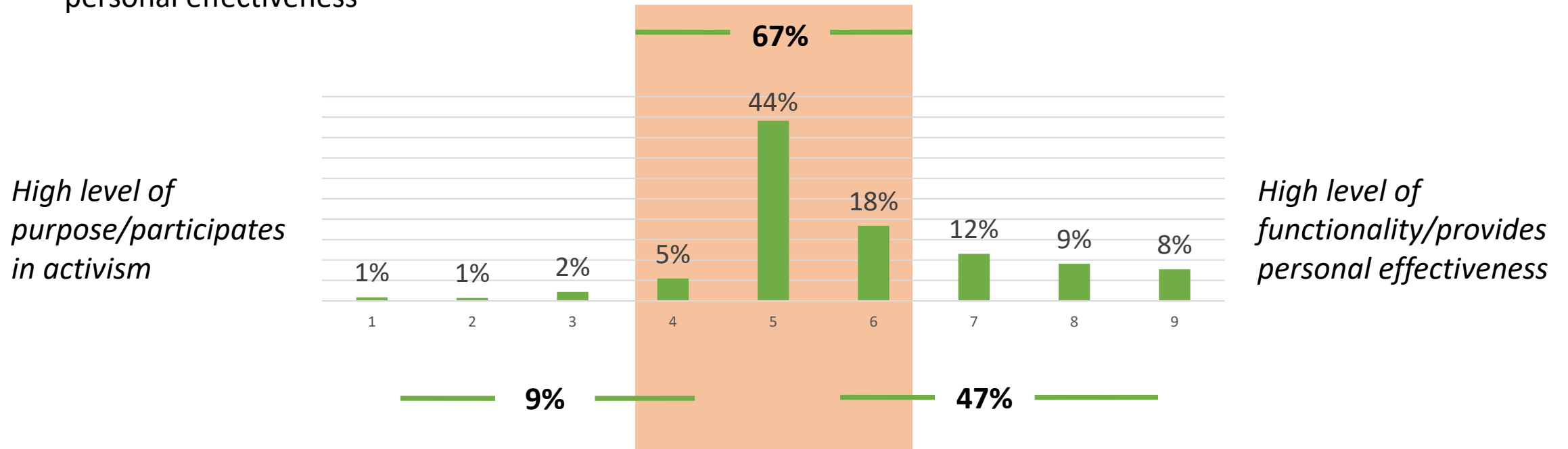


## Media Question (M4)

Support for committed brands

“Are you more likely to support a brand that has a...”

9 point scale. 1. High level of purpose/participates in activism and 9. High level of functionality/provides personal effectiveness



47% of the **3783** respondents gave an indication that they are more likely to support a brand that provides a high level of functionality/provides personal effectiveness.

**67% Straddle the middle = Unilever Reality/Expect both.**

