

## The Top Brands

What mobile users expect.

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THE TOP BRANDS

*What mobile users expect.*

## Executive Summary

The 'unwired' consumers may be in the lower income bracket but they are no less discerning in their choices than any other group of consumers. They typically base their selections on brand performance first, then style and price factors. For many, style often outweighs price

Mobile surfers are also ardent brand advocates and will make recommendations to others. Quality, reliability, value and trust are among the most cited factors that influence choices. Their advocacy, however, may not be for sale and brands need to be careful when identifying and communicating the brand promise to users. This communication should invariably include product microsites or previews on the mobile internet.

Our survey also re-affirms the status of manufacturers (as opposed to retailers) in the consumers' homes. As manufacturers continue their gradual shift towards web based e-commerce, this should also continue onto mobile where the consumer is prevalent.

While there are opportunities for manufacturers and retailers, the key to sales for many of these brands lie in mobile banking. If businesses are to benefit from these opportunities, more consumer education is needed and public-awareness campaigns need to go beyond traditional media.



## 1. Background

BuzzCity is an internationally-acclaimed provider of mobile media and advertising services. We launched our mobile advertising network in late 2006 and have been tracking its growth since then. The BuzzCity Advertising Network currently comprises more than 2,000 mobile publisher sites of various categories, including community sites, entertainment, downloads and news information services.

BuzzCity began surveying mobile internet users in June 2007 to gauge consumer habits and trends across the BuzzCity Advertising Network.

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## 2. Objectives

The primary objective of this ten country survey is to investigate the brands (products and services) that are likely to meet the needs / interests of mobile internet users and influence their purchasing decisions.

This survey is a continuation of a multi-market survey conducted by BuzzCity. In addition to observing local trends at a national level, the survey results also invite direct comparisons between markets.

In particular, this survey should provide insight on the mobile user's perceptions of their favourite brands. The results may also influence the design of future mobile content (product information) and marketing campaigns.

The big question: Who's got brand appeal among mobile internet users?

### 3. Survey Methodology

The survey was kept short to cater to the media of choice, the mobile internet. Participants were asked twelve multiple choice questions.

The survey was conducted in ten countries from 7<sup>th</sup> May 2009 to 17<sup>th</sup> July 2009. From these countries, over 1500 consumers participated in the survey – from 96 in Bangladesh to 276 in South Africa.

Here's how the survey worked:

Product categories were predetermined and are based on outcomes of previous surveys which found that respondents were predisposed to

- A digital & electronics lifestyle

- Mobile and electronics payments

- An active outdoor lifestyle

Mobile internet users were then informally interviewed and asked to name brands for specific categories of products. Up to 10 users from social networking site myGamma were asked to name brands from 4 product sectors: Electronic Products, Food Products, Fast Food and Financial Services.

These brand names were then used as options in multiple choice questions making up the survey.

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Text banners promoting the survey were placed on publisher sites across the BuzzCity mobile advertising network. Users who clicked the banner ad were directed to the survey questionnaire. To minimize intrusion, the advertising server was set to ensure that a mobile surfer saw the advertising banner no more than five times.

To ensure a fair sampling of user behavior, a variety of publisher sites were included in the exercise, including download services, entertainment sites, news & information, search and social networking communities.

Critical in the data collection process was the selection of countries. BuzzCity's mobile advertising network covers a selection of global sites. Sites were selected based on ranking derived from our Q2 2009 Mobile Advertising Index. Countries were selected from the Top 20 because they represent the highest amount of traffic across the entire network (and presumably the largest number of people surfing).

Collectively these countries represent a diverse cultural, economic and geographic range. From this, we envisaged developing global trends and individual market eccentricities.

Countries Surveyed			
Ranking	Country	Q2 '09	No of Respondents
Q2 '09			
1	Indonesia	3,777,611,188	138
2	India	1,074,462,736	164
3	United States	486,972,499	201
4	South Africa	460,816,797	276
6	Philippines	124,280,302	102
7	Egypt	107,594,556	117
10	Kenya	92,070,375	243
11	Malaysia	81,112,077	101
13	Thailand	73,146,196	145
15	Bangladesh	57,302,689	96
Total Respondents			1583

Demographic data not specifically requested in the survey – age and gender information – comes from myGamma membership statistics. myGamma members provide this data upon registration.

In the final qualitative analysis, results from previous surveys have also been considered, as have semi-structured interviews and observations expressed by members to myGamma customer service personnel. When possible, survey responses have been corroborated with data from our servers.



User profiles, behavior and usage patterns across the network were deduced from surveys conducted largely on myGamma, a BuzzCity owned mobile social networking community. A survey conducted in 2007 examined user demographics and access habits<sup>1</sup>. Another survey in early 2008<sup>2</sup> examined additional mobile services desired by consumers and demonstrated that mobile users want to be able to transact more with their phones. A survey in Feb 2009<sup>3</sup> re-affirmed demographics, habits and needs of mobile internet users.

Abstracts from previous surveys have been reported in pen profiles published in Gammalife, BuzzCity's corporate blog - [blog.buzzcity.com](http://blog.buzzcity.com)

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<sup>1</sup> BuzzCity Global Wireless Communities Report  
<sup>2</sup> The Digital Lifestyle Report – What more do users want?  
<sup>3</sup> Who uses the mobile internet – What do they do?

## 4. Survey Results

### An International Presence

To measure brand presence across markets and product sectors, brands were ranked according to user selection and point values were awarded inversely to the place / rank in which a brand finishes (see example). Top ranked brands were awarded 10 points and a brand scorecard compiled.

Rank	Brand	% Users Selected	SCORE
1	Coca-Cola	23.91	10
2	Nestlé	22.10	9
3	Kellogg's	16.67	8
4	Cadbury's	21.01	7
5	Simba	10.87	6
6	Willards	2.17	5

Over a 10 country survey, a brand that scored 100 points would be deemed to be most 'top of mind' amongst users.

## Electronic Goods

*When you think of electronic goods, which is the best brand that comes to mind?*

Across the 10 markets, the following names were repeated in at least 2 countries:-

ELECTRONICS BRAND		SCORES
1	Sony	64
2	Nokia	48
3	Samsung	48
4	LG	47
5	Panasonic	35
6	Philips	33
7	Apple	15
8	Sharp	13
9	Toshiba	12
10	Motorola	11

Typically these are goods most often used in personal entertainment and communications. These can include personal computers, cell phones, MP3 players, audio visual equipment, televisions, GPS systems, digital cameras, camcorders and DVD.

Not surprisingly, the results re-affirm domination by Japanese, South Korean and US companies. Unique among the top 10 electronics brands are Nokia and Motorola who only manufacture (consumer and carrier) telecoms devices.

As electronic devices continue on their trend of convergence, combining many elements of different electronic items, the consumer faces confusing and sometimes difficult purchasing decisions. This is perhaps reflected by two percent of consumers surveyed who “do not know why” they made their choices.

Manufacturers are also pressed to keep product information updated to assist consumers with their purchasing decisions. Across the markets we surveyed, on average, **performance** related factors were a major influence among 75% of respondents. Across the network, 64% felt their preferences were “the best quality” while 11% felt they were “tried and tested”.

The **style** factor continues to play an important role too among 14% of respondents. Among them, 6% claim their preferences are “unique and make me stand out”. Another 6% see their favourites as “popular, everyone has one” and 2% are influenced by premium pricing (“it’s expensive, so it must be good”).

**Price** is also a major factor influencing the mobile consumers’ purchases with 9% seeing their favourite products as being ‘best value for money’.

The mobile consumers’ affinity for their favourite brands also triggers the advocate amongst 98% users. Of the consumers surveyed, 54% tell others how “great” their favourite brands are and 28% proclaim their “trust” of these brands. Five percent will recommend brands after they’ve “used and tried” them and 2% will recommend products on promotions. Significantly, 9% will offer advice when asked.

## Food Products

*When you think of food products, which is the best brand that comes to mind?*

Consumers have constant access to a diversified offering of food brands and are not restricted by the local limitations (growing or breeding seasons). While variety appears unlimited, all cultures and lifestyles hold some food preferences and taboos. These are extended to their choice of food brands. The survey shows many domestic brands fare well on home ground and only four food brands are preferred internationally.

Across the 10 markets, the following names were repeated in at least 2 countries:-

	FOOD PRODUCTS	SCORES
1	Nestlé	50
2	Coca-Cola	37
3	Maggi	17
4	Kellogg's	17

The apparent brevity of this list of common names belies the fact that (despite the limitations of mobile media) some 40 common brands were nominated by mobile users we interviewed. Most of these are well localized brands and appear in the individual country reports. And like Nestlé (who also owns the Maggi and Nescafé brands) many domestic brands also deliver a wide range of food products to consumers.

Consumers tend to limit what foods they eat for reasons of faith, morality, health or other lifestyle habits. For this reason, food manufacturers are

pressed to keep product information updated and accurate to assist consumers with their purchasing decisions. This is particularly true for new food products given consumers' sensitivities to food consumption.

This complicates the communication between the brand and the consumer as performance, price and style factors are ever more intricately linked.

Performance factors influenced 68% of respondents. Among them, 57% of respondents felt their preferred food brands were the 'best quality' and 11% felt they were 'tried and tested'.

Price is a major consideration to 16% who said their preferences were based on the 'best value for money'.

The style factor weighs-in with a significant 13% of respondents: 7% say their brands are 'popular and everyone has one' and 5% say it makes them 'stand out'. Premium pricing (it's expensive....must be good) has influence over 1% of respondents.

Most respondents surveyed (98%) will recommend their preferred brand to others. Some 58% claim to be "their biggest fan...always tell people how great they are". Twenty five percent will recommend the brand because they 'trust' the brand and 10% will do so when asked for advice. Two percent of respondents will make recommendations if there are promotions.

## Fast Food

*When you think of fast food, which is the best brand that comes to mind?*

In this study the term fast food is used to mean food that can be prepared and served very quickly. This would cover all meals with low preparation time including those sold in restaurants or stores<sup>4</sup> in a packaged form for take-aways. Fast food outlets can be stands or kiosks, or self-serve restaurants (also known as quick service restaurants<sup>5</sup>). In the context of this survey fast food would include street food or food centres and is not limited to franchised products.

Fast foods are also subject to lifestyle preferences and in many markets are associated with local cultural activities. It is, again, not surprising that the list of common brand names associated with fast food is brief and is restricted to American fast foods. Despite this, across the network some 30 common brands names were nominated by consumers at the preliminary stages of the study – some are domestic brands and many are emerging international brands.

Across the 10 markets, the following names were repeated in at least 2 countries:-

FAST FOOD		SCORES
1	KFC	81
2	MCDonald's	70
3	PizzaHut	24
4	Wimpy	14

<sup>4</sup> Department stores, bookshops etc

<sup>5</sup> As opposed to sit down served meals in fast casual restaurants.

As in other product sectors, the affinity with fast food brands are based first on performance factors (59%): the “best quality” (50%) and “they are tried and tested’ (9%)

Price factor (value for money) is a major influence among 22% of respondents.

Among the product sectors surveyed, style factor in fast foods has the highest (16%) influence among respondents. Among them 8% are influenced by the products’ popularity, 6% believe its “unique” and 2% are influenced by premium pricing.

Brand affinities are again strong and 98% will recommend these brands to others. Sixty three percent of respondents “will tell people how great” their preferred brands are and 18% will make recommendations because they trust the brand. Ten percent will make referrals if asked for advice and 3% will if they have tried it. Product promotions are likely to inspire referrals among 4% of respondents.

## Top International Brands

Consolidating scorecards from each product allows us to build a brand index across product sectors and markets.

INTERNATIONAL BRANDS		SCORES
1	KFC	81
2	McDonald's	70
3	Sony	64
4	Nestlé	50
5	Samsung	48
6	Nokia	48
7	LG	47
8	Coca-Cola	37
9	Panasonic	35
10	Philips	33
11	PizzaHut	24
12	Maggi	17
13	Kellogg's	17
14	Apple	15
15	Wimpy	14
16	Sharp	13
17	Toshiba	12
18	Motorola	11

The scorecard of international brands presents brands that were mentioned in at least 2 markets. Of the 18 brands, Kentucky Fried Chicken (KFC) emerged tops with a score of 81 (of a possible 100). McDonald's came is 2<sup>nd</sup> with 70 points and Sony is 3<sup>rd</sup> with a score of 64.



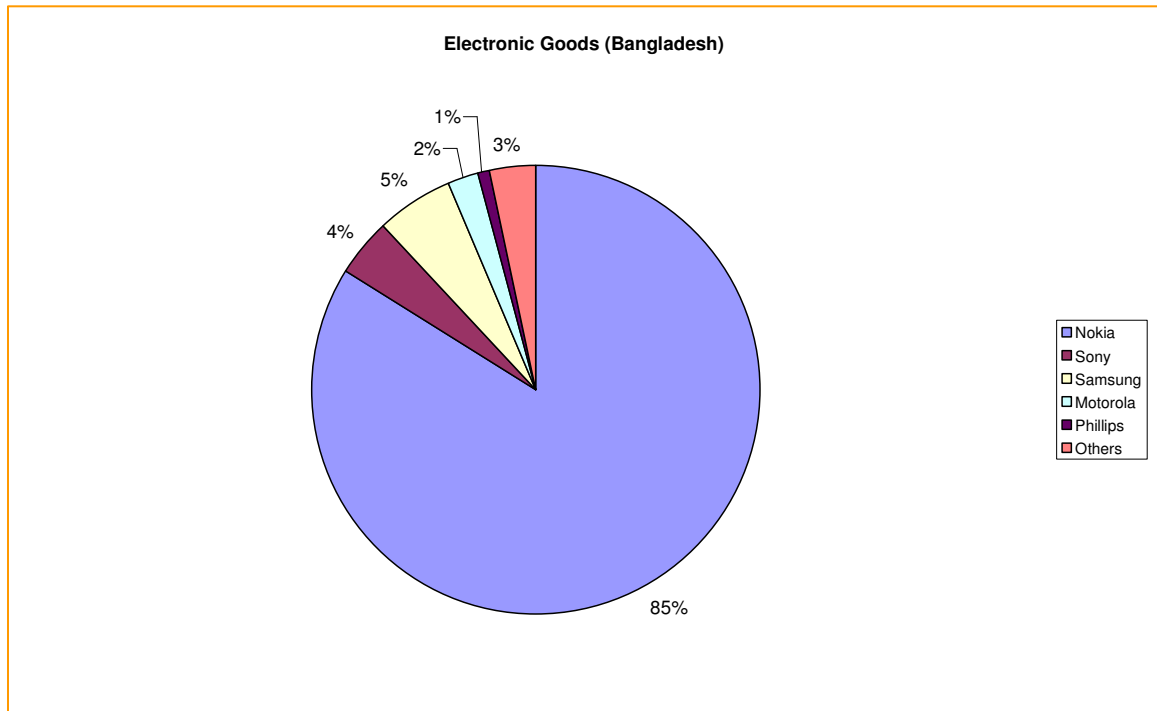
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## **A National Presence**

The following section of this report summarises the brands that command consumer awareness in each market.

## Bangladesh

*When you think of electronic goods, which is the best brand that comes to mind?*



**Chart 1**

In Bangladesh, top of mind amongst consumers is Nokia (85%). Trailing far behind are Samsung (5%), Sony 4(%), Motorola (2%) and Philips (1%). While this sector includes televisions, audio / video players, cameras, camcorders and various home appliances, the presence of Nokia and Motorola (whose products are focused solely on telecommunications) suggest that perceptions are skewed by cell phone use.

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Performance factors influenced 76% of respondents. Among them, 72% of respondents felt their preferred food brands were the “best quality” and 4 % felt they were “tried and tested”.

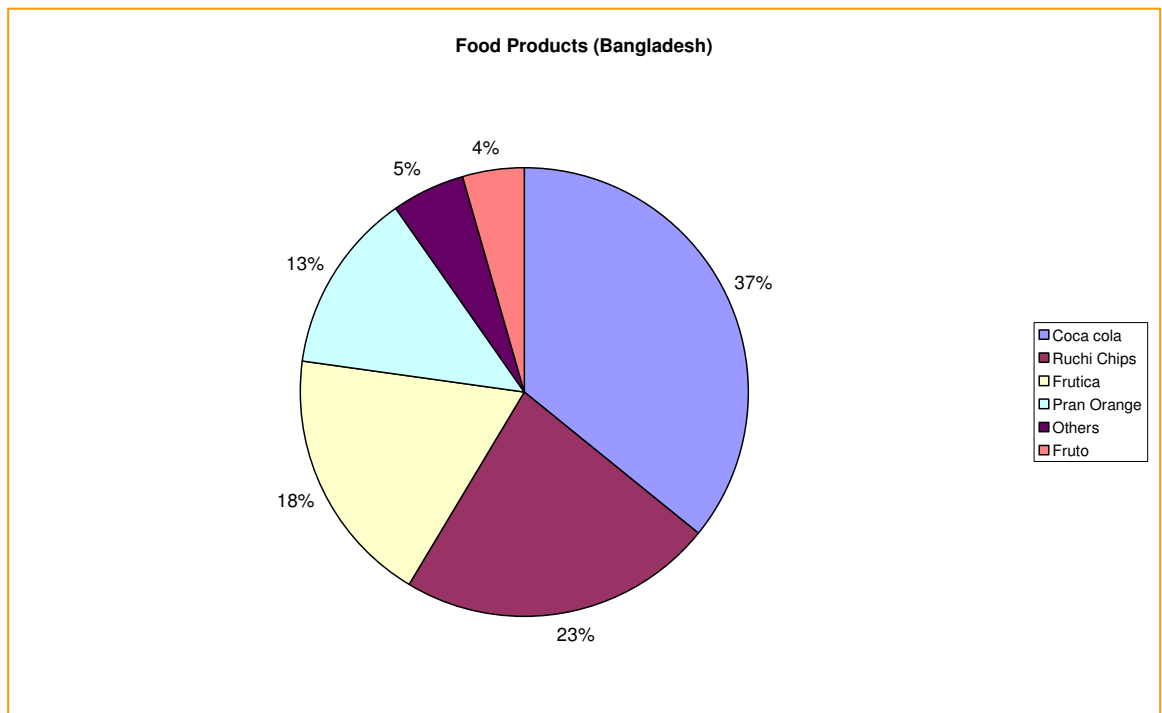
The style factor is a major influence among 23% of respondents: 10% say it’s unique, 10% say their brands are “popular and everyone has one” and 3% are influenced by premium pricing (it’s expensive....must be good) has influence over 1% of respondents.

The suggested price factor (value for money) is not an acknowledged consideration among any of the respondents.

Brand affinities are again strong and 99% will recommend these brands to others. Seventy two percent of respondents “will tell people how great” their preferred brands are and 15% will make recommendations because they trust the brand. Nine percent will make referrals if asked for advice and 3% will if they have tried it. Product promotions are NOT likely to inspire referrals among any of respondents.

*When you think of food products, which is the best brand that comes to mind?*

Coca-Cola is top ranked (37%) among mobile consumers when food products come to mind. This is followed closely by Ruchi Chips (23%), Frutica (18%) and Pran Orange (13%).



**Chart 2**

The preference for food brands are based first on performance factors (76%): the “best quality” (63%) and “they are tried and tested” (13%)

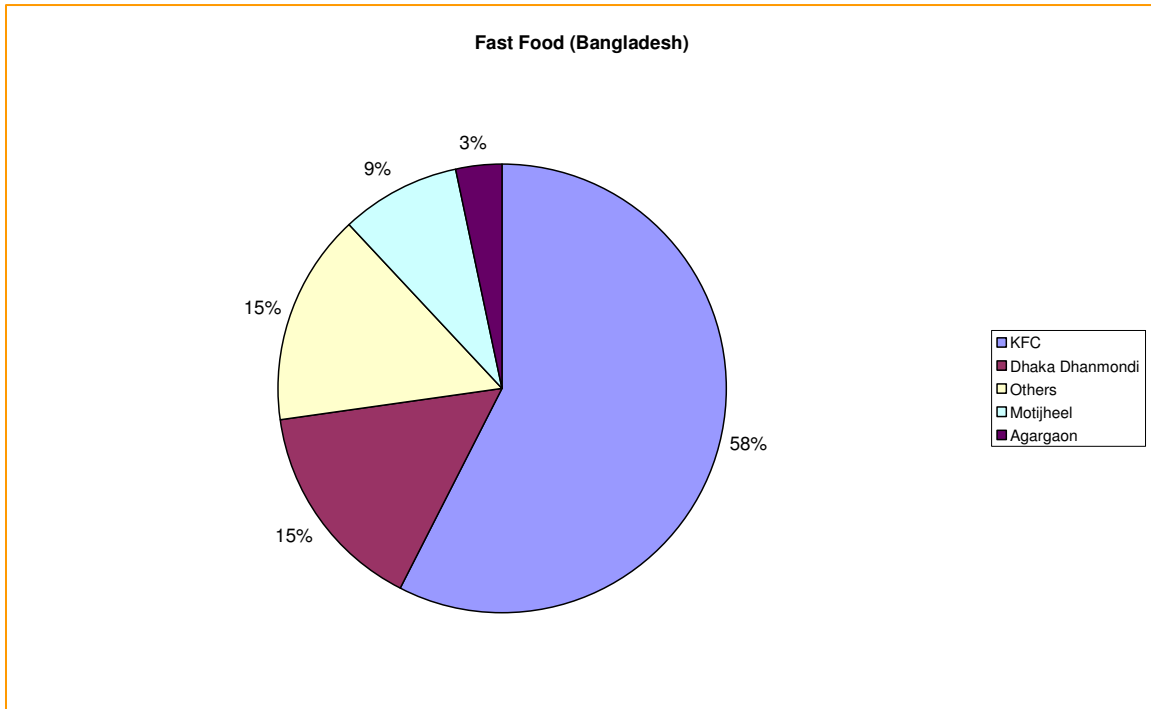
Price factor (value for money) is a minor influence (3%) although style factors have a high degree of influence 20%: 3% are influenced by the

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products' popularity, 13% believe its "unique" and 4% are influenced by premium pricing.

Brand affinities are strong and 99% will recommend these brands to others. Sixty two percent of respondents "will tell people how great" their preferred brands are and 25% will make recommendations because they trust the brand. Eight percent will make referrals if asked for advice and 3% will if they have tried it. Product promotions are likely to inspire referrals among 1% of respondents.

*When you think of fast food, which is the best brand that comes to mind?*



**Chart 3**

KFC ranks tops among 52% of Bangladeshi mobile consumers. Ranked 2nd, 4th and 5th are food districts in Dhaka. In 3rd place are un-named ‘others’ (most likely to include Pizza Corner, Coffee World, Nando’s, Pizza Hut and Al-Baik restaurants)

Selection of fast food brands are based first on performance factors (68%): the “best quality” (60%) and “they are tried and tested” (8%).

Style factors have the second highest (19%) influence after performance. Among them 5% are influenced by the products’ popularity, 9% believe its “unique” and 5% are influenced by premium pricing. Three percent can’t explain (do not know why they made their choices) their brand preferences.

The price factor (value for money) influences 10% of respondents.

Brand preferences are strong and 96% will recommend these brands to others: sixty five percent of respondents “will tell people how great” their preferred brands are and 15% will make recommendations because they trust the brand. Seven percent will make referrals if asked for advice and 1% will if they have tried it. Product promotions are likely to inspire referrals among 8% of respondents.

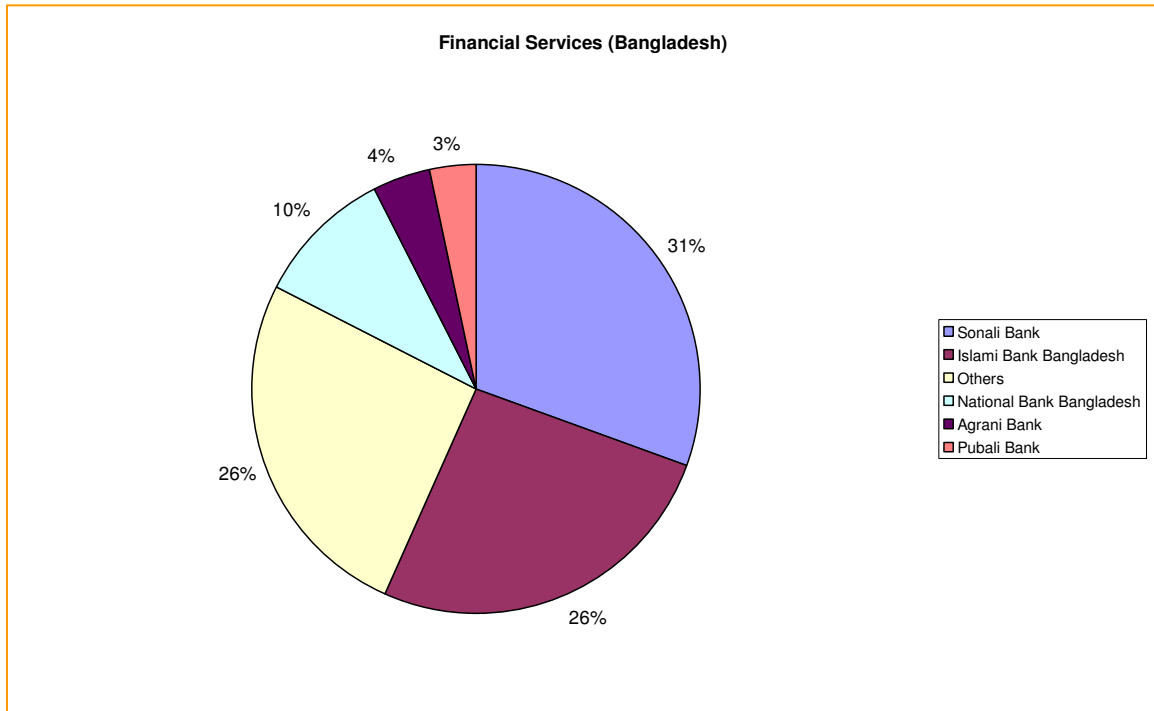
Note:-

Motijheel is a commercial area in Dhaka city. Many institutions and company head offices are located here. The area is noted also for street hawker markets where cheap products including food are widely available.

Dhanmondi is an area of mixed of commercial and residential use particularly noted for lakeside recreation that attracts city dwellers every day. Snack stalls offer a variety of low-cost snacks and beverages. All established local and international fast food chains in the country have outlets in Dhanmondi.

Agargaon is a borough in the Bangladeshi city of Dhaka.

*When you think of financial services, which is the best brand that comes to mind?*



**Chart 4**

Top of mind in the financial services sector is Sonali Bank (31%) and Islami Bank Bangladesh (26%) is in 2nd place. “Others” are 3<sup>rd</sup> placed and most likely include international services like Citibank, HSBC and Standard Chartered

Sixty nine percent feel their chosen brand is trustworthy and 12% prefer them for their variety of banking products. Among the respondents 69% evangelise their chosen brand with 20% placing their trust in them.

The selection of financial services are based first on performance factors (84%): the “most trustworthy” (69%), variety of products (12%) and “been around a long time (3%)”

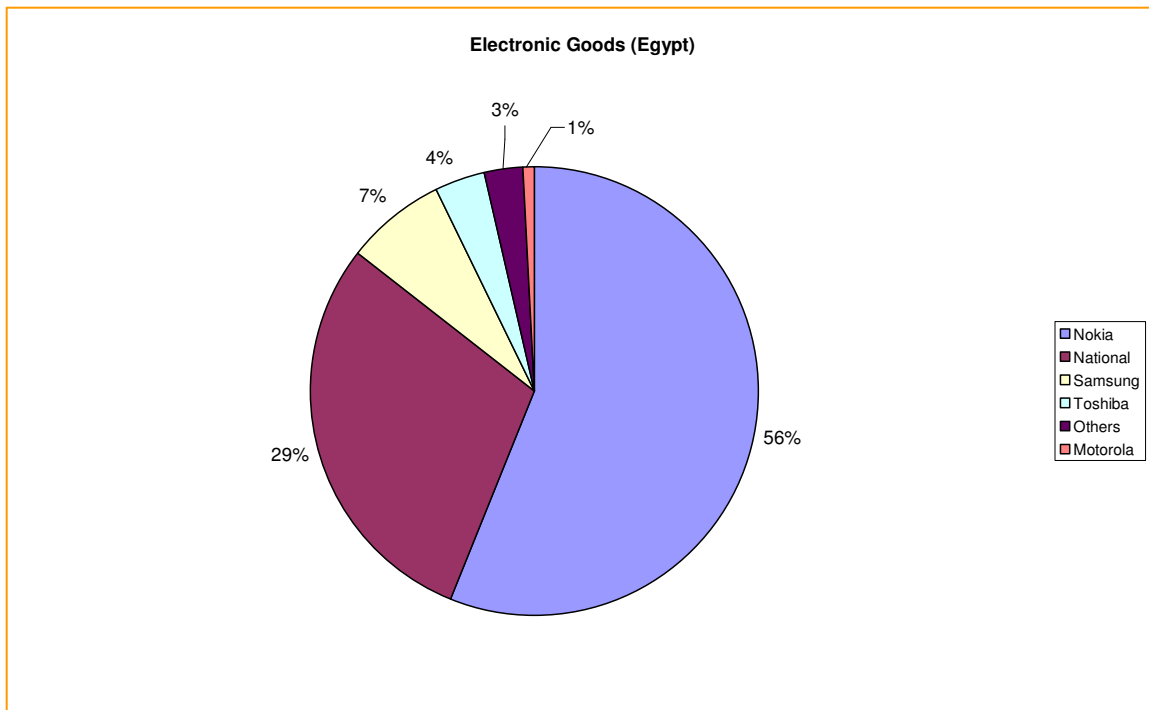
The price factor (lowest fees or attractive rates) influences 8% of respondents.

Style factors influences 4% of respondents. Among them 2% are influenced because “everyone uses it”, 2 % believe it “makes me look good...I want that card”.

Brand affinities are again strong and 98% will recommend their financial service providers to others. Sixty nine percent of respondents “will tell people how great” their preferred brands are and 20% will make recommendations because they trust the brand. Seven percent will make referrals if asked for advice and 1% will if they have tried it. Product promotions are NOT likely to inspire referrals among respondents.

## Egypt

*When you think of electronic goods, which is the best brand that comes to mind?*



**Chart 4**

Of the electronics goods, Nokia is the best recognised (56%) brand among mobile users in Egypt. This is followed by National (29%) and at a distant third is Samsung (7%).

National has, as far as this report can tell, been phased out and re-branded as Panasonic since 2004. Despite this the National brand continues to linger among respondents and continues to command at least recall if not usage.

Why do mobile users like these electronics brands? The choice of electronic brands in Egypt is highly based (72%) on performance factors: the “best quality” (68%) and “they are tried and tested’ (4%)

Style factors are a major (12%) influencer among respondents. Among them 2% are influenced by the products’ popularity, 5% believe its “unique” and 5% are influenced by premium pricing.

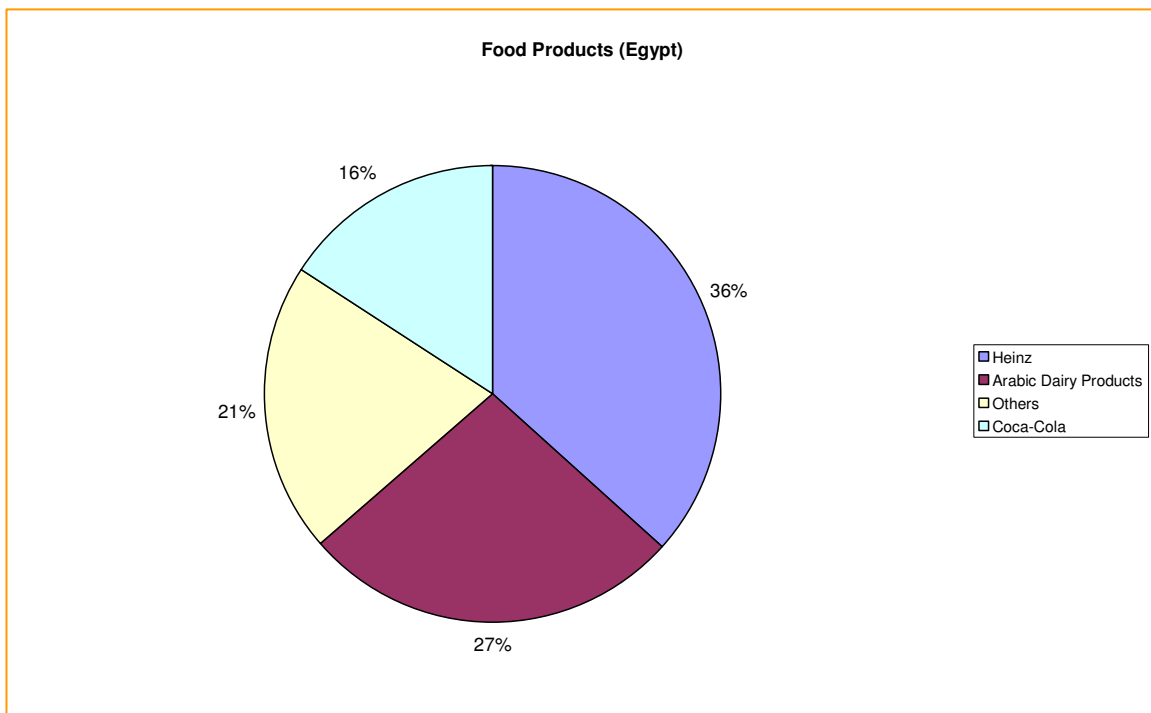
Price factor (best value for money) influences 9% of respondents.

Seven percent of respondents “do not know why” they chose the brands.

Brand affinities are strong and 95% will recommend their chosen brands to others. Seventy three percent of respondents “will tell people how great” their preferred brands are and 10% will make recommendations because they trust the brand. Seven percent will make referrals if asked for advice and 4% will if they have tried it. Product promotions are likely to inspire referrals among 1% of respondents.

*When you think of food products, which is the best brand that comes to mind?*

Among the food brands Heinz (ketchups, sauces, beans) is tops amongst 36% of users; in second place is The Arab Dairy Products (cheese products) scoring 27% and Coca Cola at 16%.



**Chart 5**

The selection of food brands in Egypt is based first on performance factors (76%): the “best quality” (71%) and “they are tried and tested’ (5%).

Price factor (best value for money) influences 8% of respondents.

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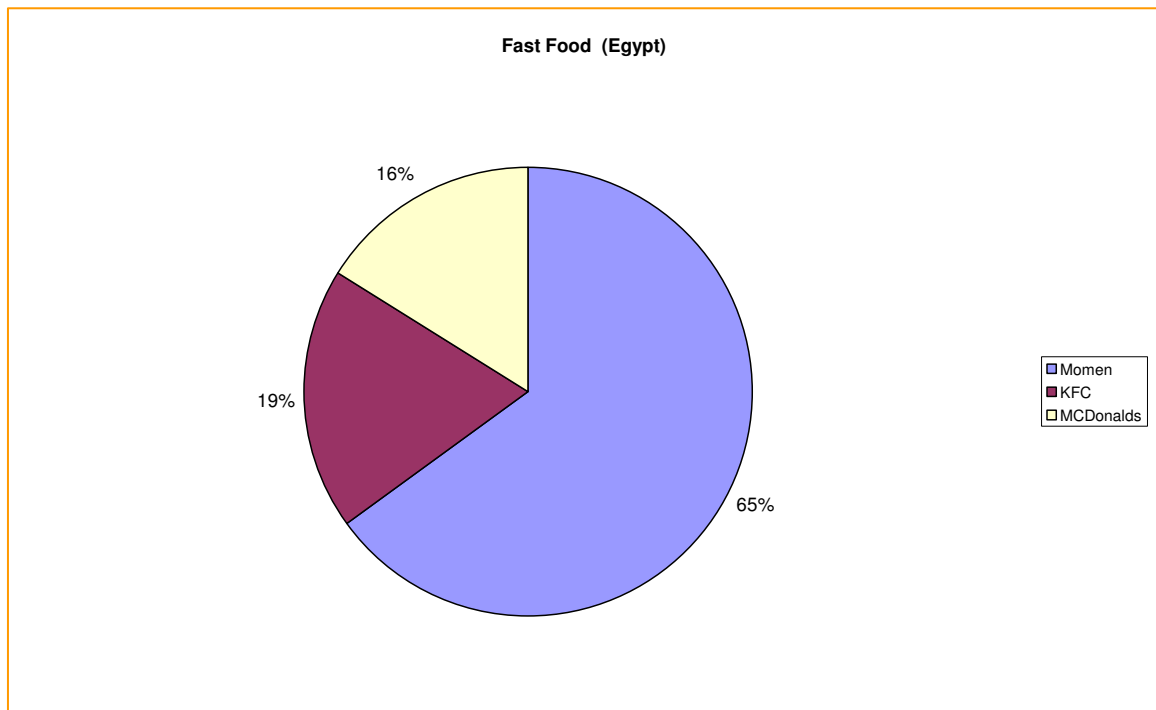
Style factors influence 8% of respondents. Among them 5% are influenced by the products' popularity and 3% are influenced by premium pricing.

A significant 8% cannot explain why they chose a brand.

Ninety Seven percent of respondents will recommend these brands to others; 71% "will tell people how great" their preferred brands are and 9% will make recommendations because they trust the brand. Eleven percent will make referrals if asked for advice and 4% will if they have tried it. Product promotions are likely to inspire referrals among 2% of respondents.

*When you think of fast food, which is the best brand that comes to mind?*

Among fast foods Mo'men (sandwiches) is top of among 65% of Egyptian mobile surfers with KFC (19%) and McDonald's (16%) in second and third place. Noticeably absent are Cook Door (sandwiches, fajitas), Hardees (burgers) and Pizza Hut which typically serve the urban markets suggesting a rural skew to mobile internet media.



**Chart 6**

The majority (81%) of mobile surfers choose fast food brands based on performance factors; the “best quality” among 79% and “they are tried and tested’ among 4% of respondents.

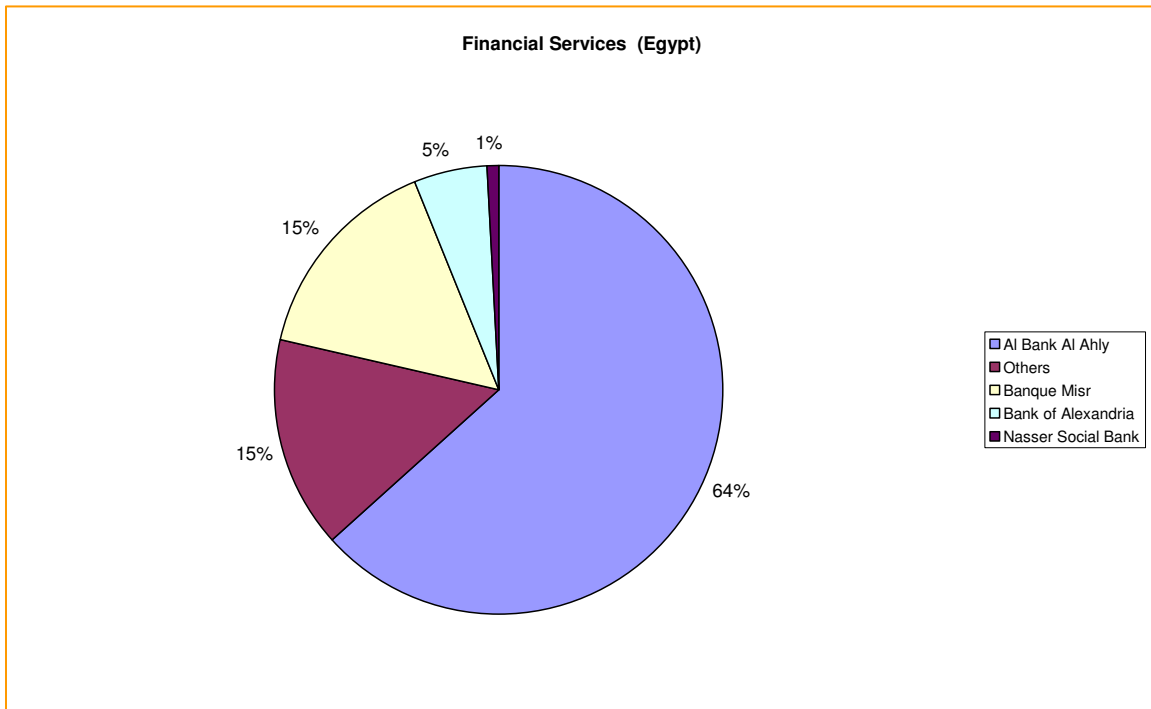
Style factors in fast foods have a high (8%) influence among respondents. Among them, 2% are influenced by the products’ popularity, 3% believe its “unique” and 3% are influenced by premium pricing.

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Price factor (value for money) influences 7% of respondents while 2% can't explain their choices.

Brand affinities are again strong and 97% will recommend these brands to others. 79% percent of respondents "will tell people how great" their preferred brands are and 7% will make recommendations because they trust the brand. 8% percent will make referrals if asked for advice and 1% will if they have tried it. Product promotions are likely to inspire referrals among 2% of respondents.

*When you think of financial services, which is the best brand that comes to mind?*



**Chart 7**

In the financial services sector Al Bank Al Ahly (National Commercial Bank) is ranked first among 64% of users with Banque Misr (15%). at second place.

Notably, ‘others’ also scored 15% and included the various other banks in Egypt ( Bank of Alexandria, National Bank of Egypt, Banque Du Caire, National Société Générale Bank, Egyptian American Bank, Faisal Islamic Bank of Egypt, Egyptian Commercial Bank, The Nile Bank, Al Watany Bank of Egypt )

Performance factors rank high among Egyptian respondents (81%): the “most trustworthy” (76%) and variety of products (3%) and been around a long time” (2%)

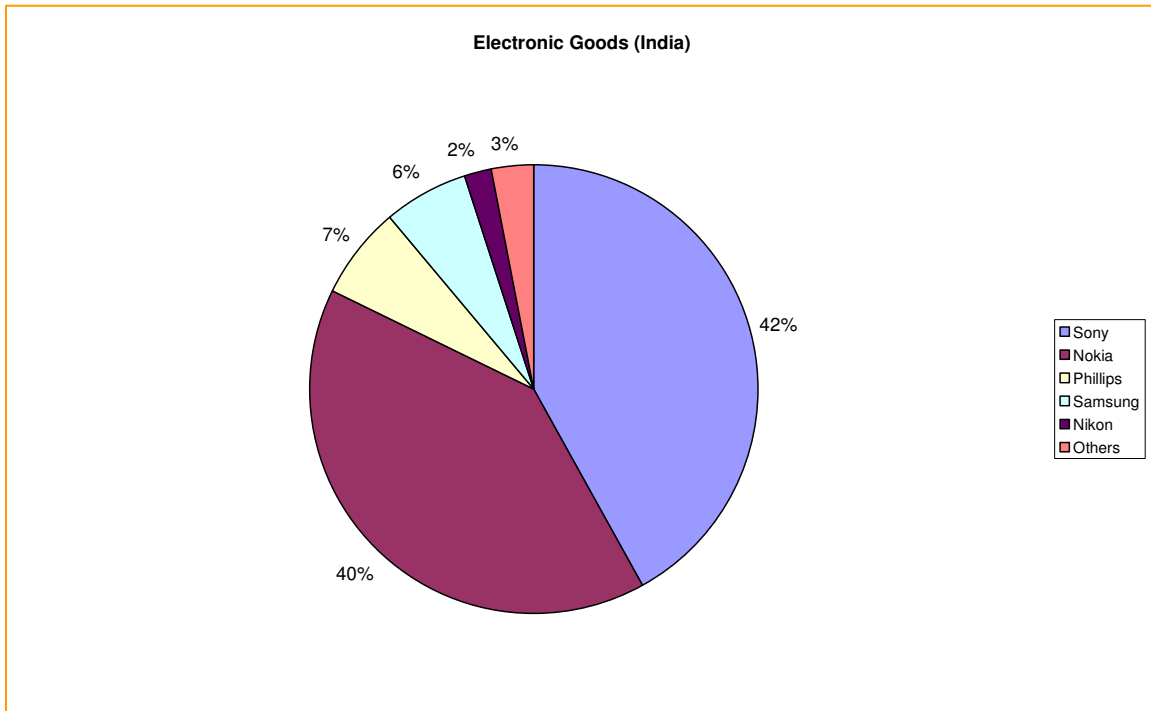
The price factor (lowest fees / attractive rates) influences 8% of people.

Style factors influence 6% of respondents. Among them 2% are influenced by the products’ popularity (everyone uses it) and 3% believe “it makes me look good”.

Brand affinities are again strong and 97% will recommend these brands to others. Eighty percent of respondents “will tell people how great” their preferred brands are and 9% will make recommendations because they trust the brand. Four percent will make referrals if asked for advice and 3% will after they have tried it. Product promotions are likely to inspire referrals among 1% of respondents.

## India

*When you think of electronic goods, which is the best brand that comes to mind?*



**Chart 8**

Among electronics products, Sony (42%) and Nokia (40%) both have a large following leaving Philips (7%) and Samsung (6%) in distant 3<sup>rd</sup> and 4<sup>th</sup> places respectively. Indian mobile users appear to have a penchant for photography voting Nikon (2%) in at 5<sup>th</sup> place – the only camera manufacturer to be listed in the entire network.

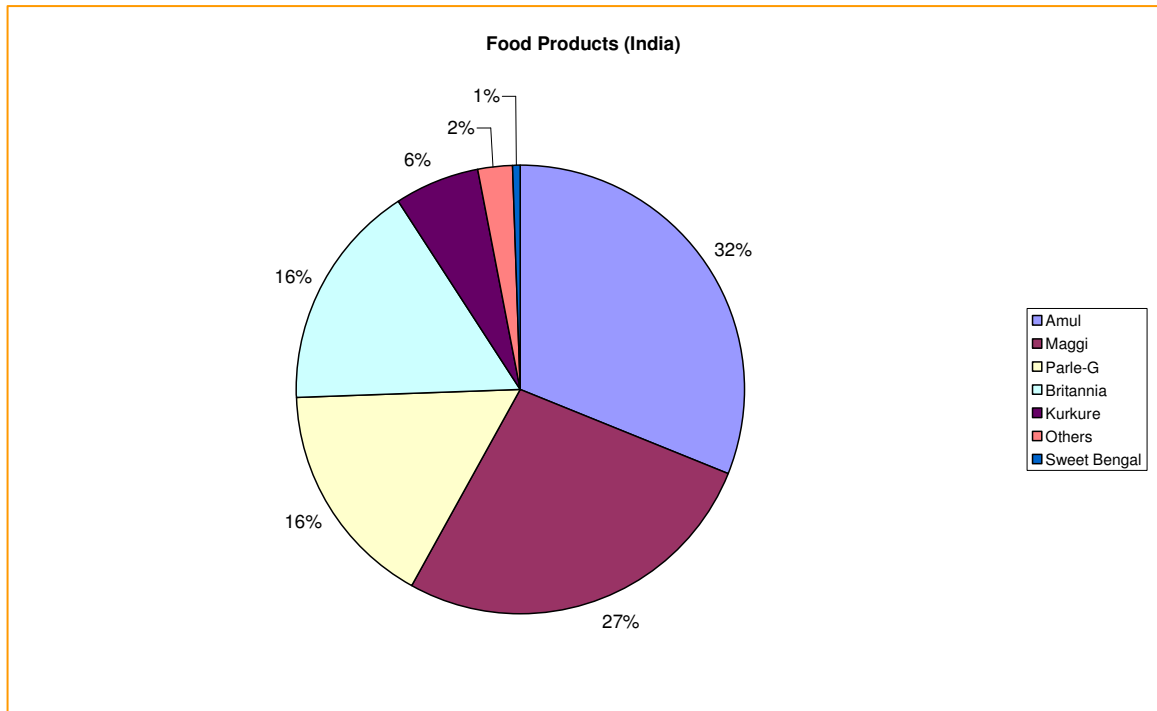
The choice of electronics brands in India is based largely on performance factors (70%): the “best quality” (63%) and “they are tried and tested’ (7%)

Style factors are a major (16%) influence among respondents: 9% are influenced by the products’ popularity, 6% believe its “unique” and 4% are influenced by premium pricing.

Price factor (value for money) is a major influence among 10% of respondents.

Brand affinities are strong and 98% will recommend their favourite brands to others. Fifty four percent of respondents “will tell people how great” their preferred brands are and twenty eight percent will make recommendations because they trust the brand. Eight percent will make referrals if asked for advice and 7% will after they have tried it. Product promotions are likely to inspire referrals among 1% of respondents.

*When you think of food products, which is the best brand that comes to mind?*



**Chart 9**

Of the numerous food brands in India, Amul (32%), manufacturers of numerous dairy products, is tops with Maggi (27%) in 2<sup>nd</sup> place (Maggi in India is largely associated with the 2-minute instant noodle). In joint 3<sup>rd</sup> place are Parle-G (16%) and Britannia (16%) biscuit brands.

Food choices are based first on performance factors (71%): the “best quality” (65%) and “they are tried and tested’ (6%)

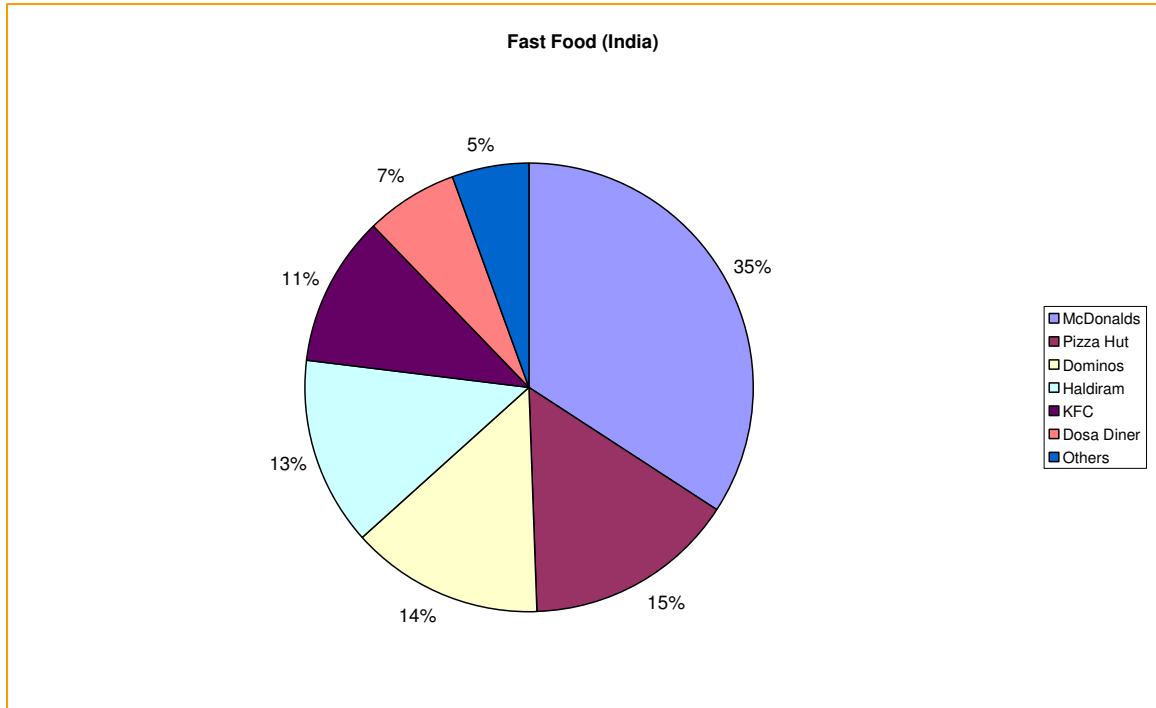
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The style factor in food selection influences 16% respondents. Among them 6% are influenced by the products' popularity, 7% believe its "unique" and 3% are influenced by premium pricing.

Price factor (value for money) is a major influence among 12% of respondents.

Brand affinities are again strong and 97% will recommend these brands to others. Fifty one percent of respondents "will tell people how great" their preferred brands are and 25% will make recommendations because they trust the brand. Fifteen percent will make referrals if asked for advice and 5% will if they have tried it. Product promotions are likely to inspire referrals among 1% of respondents.

*When you think of fast food, which is the best brand that comes to mind?*



**Chart 10**

Among Fast Foods McDonald’s is tops at 35%, with Pizza Hut (15%) and Dominos (14%) in 2<sup>nd</sup> and 3<sup>rd</sup> place. Haldiram’s (sweet and savoury sancks) in 4<sup>th</sup> place scored 13% with KFC (11%) in 5<sup>th</sup> place. Dosa Diner (7%) whose outlets are in metropolitan Pune & Mumbai only, suggests a regional skew in the data.

Indian mobile users base their brand preferences largely on performance factors (56%): the “best quality” (51%) and “they are tried and tested’ (5%)

Price factor (value for money) is a major influence among 21% of respondents.

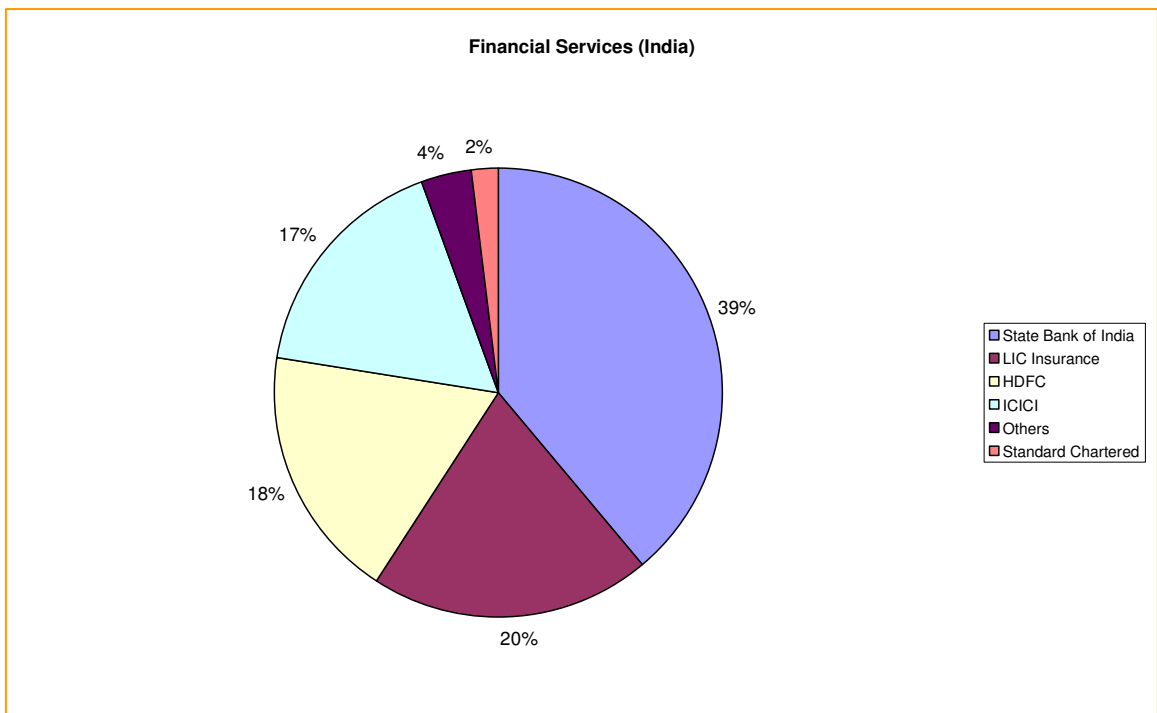
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Style factors influence 20% of respondents in their selection of fast food. Among them 9% are influenced by the products' popularity, 9% believe its "unique" and 2% are influenced by premium pricing.

Brand affinities are again strong and 96% will recommend these brands to others. Fifty six percent of respondents "will tell people how great" their preferred brands are and 22% will make recommendations because they trust the brand. Eleven percent will make referrals if asked for advice and 5% will if they have tried it. Product promotions are likely to inspire referrals among 2% of respondents.

*When you think of financial services, which is the best brand that comes to mind?*

State Bank of India (39%), India’s public sector bank, is ranked first with LIC insurance in second place (20%). In 3rd and 4th place are HDFC Bank (18%) and ICICI Bank (17%).



**Chart 11**

Users’ choice of financial services is first based on performance factors (83%): the “most trustworthy” (66%), variety of products (12%) and “been around for a long time” (5%)

Price factor (lowest fees / attractive rates) influences 6% of respondents.

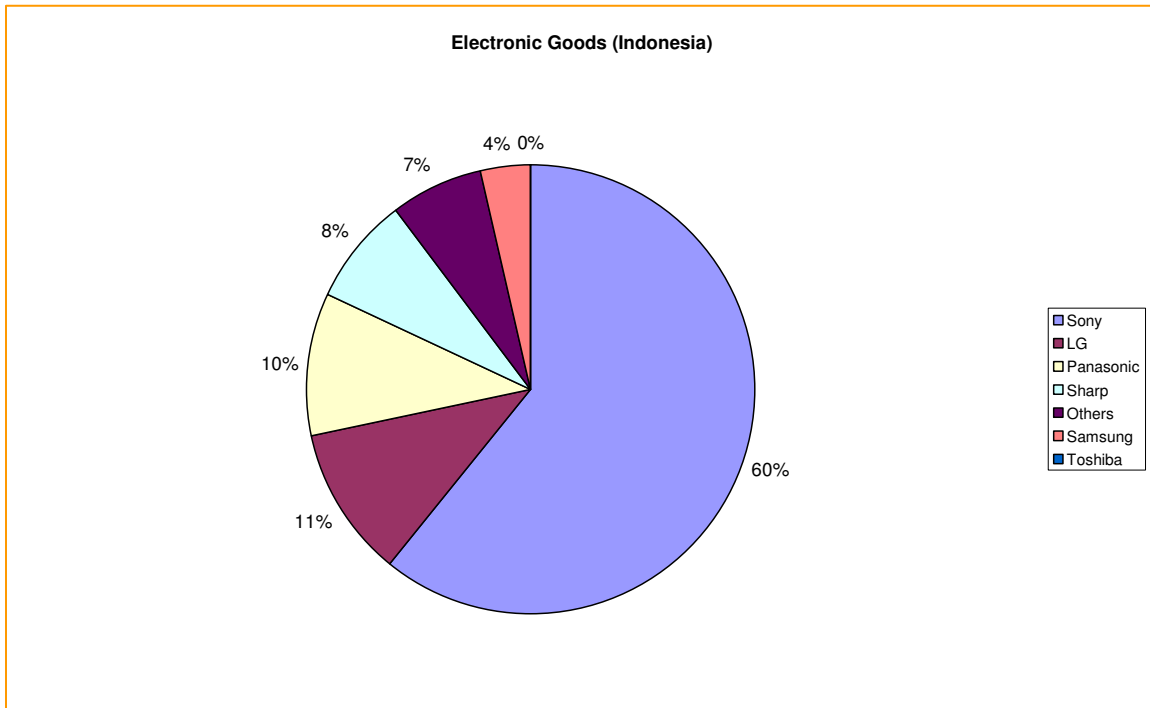
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Style factors influence of 9% respondents. Among them 7% are influenced by the products' popularity and 2% believe "it makes me look good .. I want that card in my pocket".

Brand affinities are again strong and 98% will recommend these brands to others. Fifty five percent of respondents "will tell people how great" their preferred brands are and 30% will make recommendations because they trust the brand. Eight percent will make referrals if asked for advice and 4% will after they have tried it. Product promotions are likely to inspire referrals among 1% of respondents.

## Indonesia

*When you think of electronic goods, which is the best brand that comes to mind?*



**Chart 12**

Sony ranked tops among users in Indonesia with 60% of users choosing this brand. In distant 2nd and 3rd are LG Electronics (11%) and Panasonic (10%).

The affinity with electronics brands are based first on performance factors (75%): 55% say their preferred brands are “the best quality” and 20% believe them to be tried and tested brands.

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Style factors have a high (14%) influence among respondents. Among them 7% are influenced by the products' popularity and 7% believe its "unique ...makes me stand out"

Price factor is key among 7% of users who see their brands as "best value for money".

Brand affinities are again strong and 98% will recommend these brands to others. Forty five percent of respondents "will tell people how great" their preferred brands are and 26% will make recommendations because they trust the brand. Eighteen percent will make referrals if asked for advice and 5% will recommend after they have used and tried the product. Four percent will make recommendations if there are product promotions.

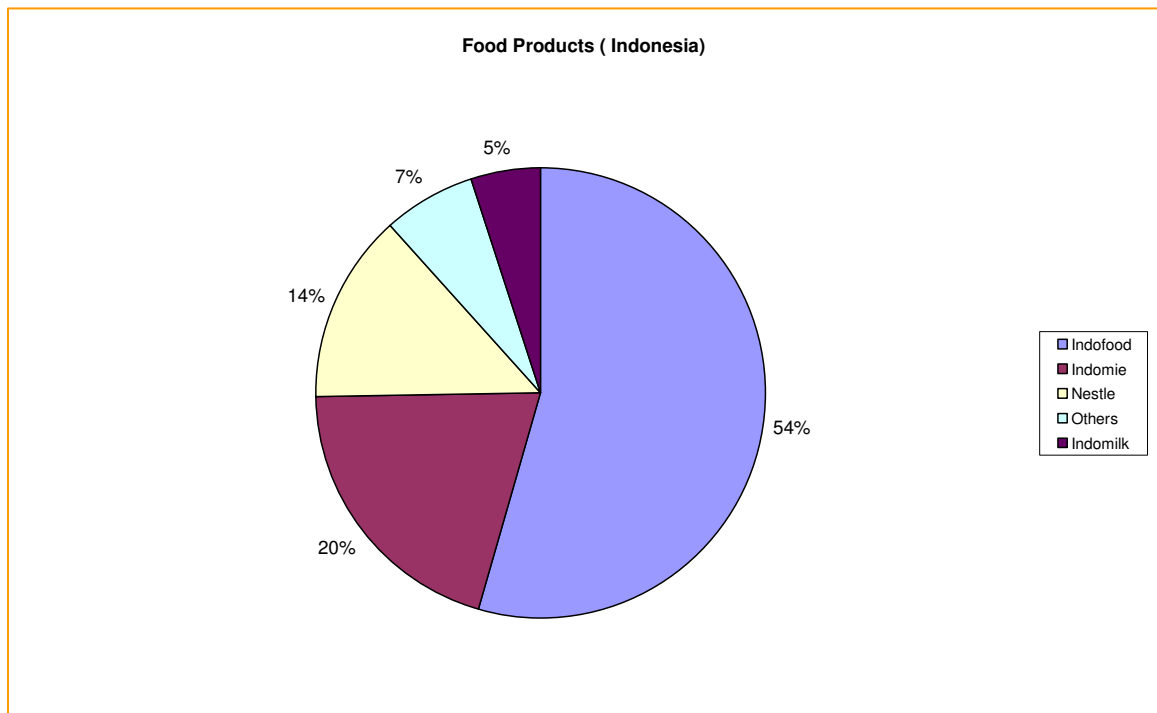
2% are not likely to make any recommendations.

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*When you think of food products, which is the best brand that comes to mind?*

Indofood (noodles, food seasonings, snack foods and nutrition & special foods) scored tops with 54% and Indomie (instant noodles) at 20%.. Nestlé came in 3rd at 14% and Indomilk at 5%.

Notably Indomie and Indomilk are brands of Indofood. Collectively Indofood products score 79% among Indonesian users.



**Chart 13**

The selection of food brands are based first on performance factors 69%; the “best quality” (65%) and “they are tried and tested’ (4%)

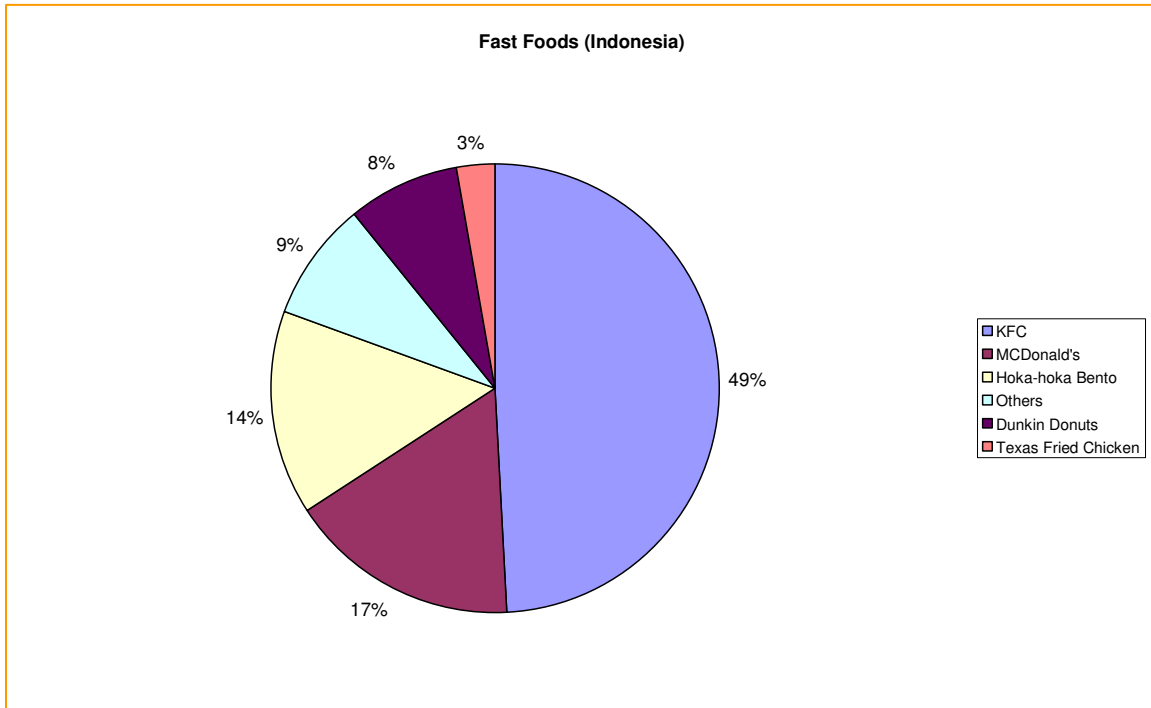
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Price factor (value for money) is a major influence among 15% of respondents.

The style factor has a high influence 14% influence among respondents – ‘it’s popular and everyone has one’

Brand affinities are again strong and 98% will recommend these brands to others. Fifty eight percent of respondents “will tell people how great” their preferred brands are and 22% will make recommendations because they trust the brand. Ten percent will make referrals if asked for advice and 4% will if they have tried it. Product promotions are likely to inspire referrals among 4% of respondents. 2% will not make recommendations.

*When you think of fast food, which is the best brand that comes to mind?*



**Chart 14**

Among fast foods KFC dominates (49%) with McDonald's in 2nd place and Hoka Hoka Bento in close 3rd (14%). Dunkin Donuts (8%) and Texas Fried Chicken (3%) are 4<sup>th</sup> and 5<sup>th</sup> place among Indonesian mobile users.

In 3<sup>rd</sup> place are a selection of Others (9%), likely to include JC Donuts, California Fried Chicken, Saboga etc.

The affinity with brands are based first on performance factors (47%): the "best quality" (46%) and "they are tried and tested" (1%)

Price factor (value for money) is a major influence among 28% of respondents.

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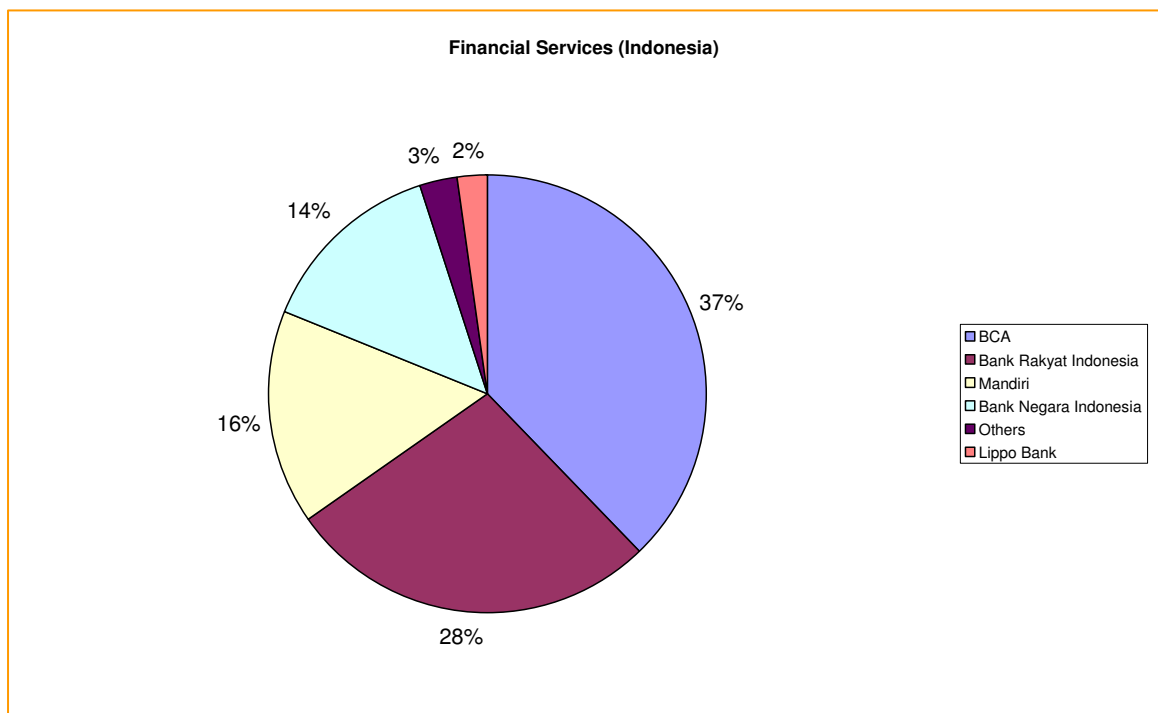
Style factors have a high (21%) influence among respondents. Among them 13% are influenced by the products' popularity, 7% believe its "unique" and 1% are influenced by premium pricing.

Brand affinities are again strong and 96% will recommend these brands to others. Sixty three percent of respondents "will tell people how great" their preferred brands are and 9% will make recommendations because they trust the brand. Fourteen percent will make referrals if asked for advice and 4% will if they have tried it. Product promotions are likely to inspire referrals among 6% of respondents.

Four percent will not make recommendations of their favourite brands.

*When you think of financial services, which is the best brand that comes to mind?*

BCA (Bank Central Asia) is tops at 37%. In second place is Bank Rakyat Indonesia (28%) and 3<sup>rd</sup> is Bank Mandiri (16%). BNI (Bank Negara Indonesia) 14% is in 4th place after various re-branding and re-positioning exercises in more recent times.



**Chart 15**

The selection of financial services are based first on performance factors (81%): the “most trustworthy” (52%), “been around a long time” (15%) and variety of products (14%)

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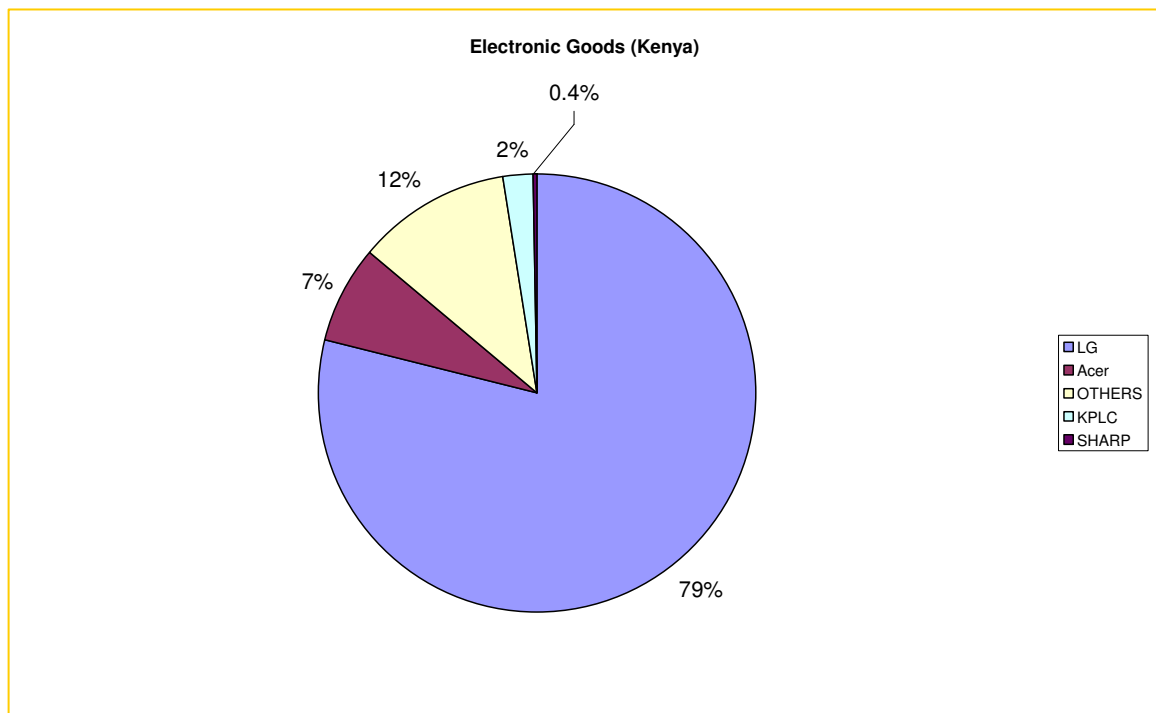
The price factor (lowest fees or attractive rates) influences 9% of respondents.

Style factors influences 7% of respondents. Among them 5% are influenced because “everyone uses it”, 2% believe it “makes me look good...I want that card”.

Brand affinities are again strong and 98% will recommend their financial service providers to others. Fifty two percent of respondents “will tell people how great” their preferred brands are and 20% will make recommendations because they trust the brand. Twenty percent will make referrals if asked for advice and 4% will if they have tried it. Product promotions are NOT likely to inspire referrals among respondents.

## Kenya

*When you think of electronic goods, which is the best brand that comes to mind?*



**Chart 16**

Tops in Kenya is LG Electronics among 79% of users, Acer (7%) is a distant second. Other (12%) electronics manufacturers are in joint second place.

The selection of brands are based first on performance factors (70%): 61% of respondents see their favourite brands as having the best quality 9% say it's tried and tested.

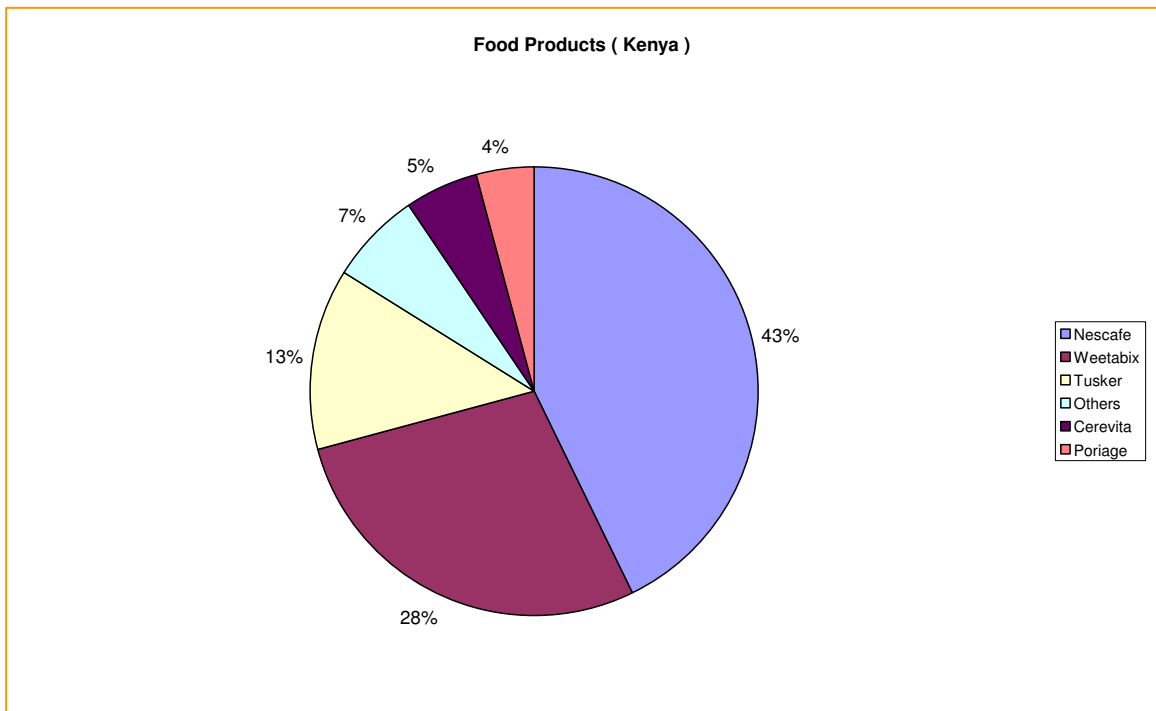
Style factors influences 17% of respondents. Among them 13% believe its "unique", 2% say its "popular" and 2% are influenced by premium pricing.

Price factor (value for money) is a major influence among 13% of respondents.

Brand affinities are again strong and 99% will recommend these brands to others. Forty six percent of respondents “will tell people how great” their preferred brands are and 44% will make recommendations because they trust the brand. Five percent will make referrals if asked for advice and 3% will if they have tried it. Product promotions are likely to inspire referrals only among 1% of respondents.

*When you think of food products, which is the best brand that comes to mind?*

Among food brands Nescafé (instant coffee, a product of Nestlé SA) was first ranked and selected by 43% of users. Weetabix (breakfast cereal) is second at 28% and Tusker (beer, East African Breweries) is 3<sup>rd</sup> placed among 13% of users. Cerevita (5%) and Poriage (4%) are in 5<sup>th</sup> and 6<sup>th</sup> place.



**Chart 16**

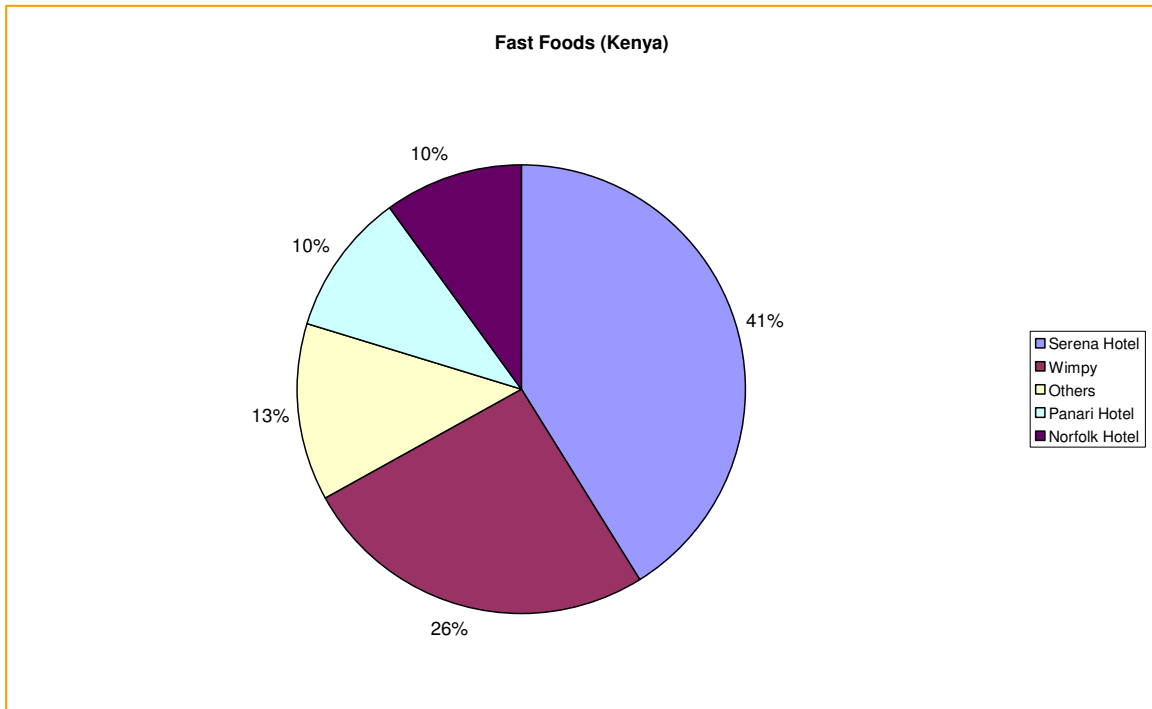
As in other product sectors, the affinity with food brands are based largely on performance factors (66%): the “best quality” (59%) and “they are tried and tested’ (7%)

The style factor influences 18% of respondents. Among them 5% are influenced by the products’ popularity, 11% believe its “unique” and 2% are influenced by premium pricing.

Price factor (value for money) is a major influence among 14% of respondents.

Brand affinities are again strong and 97% will recommend these brands to others. Fifty one percent of respondents “will tell people how great” their preferred brands are and 34% will make recommendations because they trust the brand. Ten percent will make referrals if asked for advice and 2% will if they have tried it. Product promotions are likely to inspire referrals among 2% of respondents.

*When you think of fast food, which is the best brand that comes to mind?*



**Chart 16**

Apart from Wimpy (26%) in 2<sup>nd</sup> place three hotels are named; many hotels in Nairobi operate food courts e.g. The Panari Hotel forms part of the Panari Sky Centre that includes shopping mall, skating rink, cinemas and food courts. Upscale hotels (Norfolk Hotel, Windsor hotel etc) also run food courts.

Noticeably absent from the results are other brand Steers, Kenchic Inns (domestic brand of chicken meals), Walkers (burgers), Java Coffee House and Southern Fried Chicken. Equally absent from responses are other known food locations (Etouch Food Court, Sarit Centre, Diamond Plaza, Village Market or Ya-Ya centre) suggesting ample branding opportunities for these brands in Kenya.

The affinity with these brands are based first on performance factors (43%): the “best quality” (38%) and “they are tried and tested’ (5%)

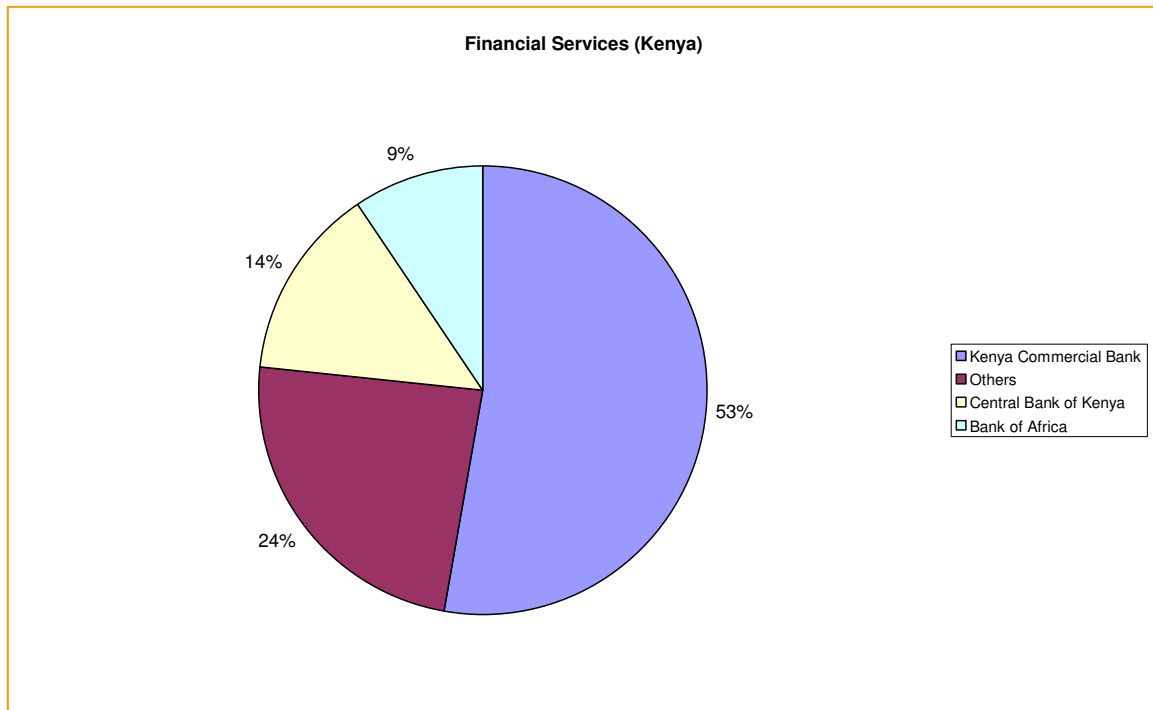
Price factor (value for money) is a major influence among 27% of respondents.

Style factors rank high among 27% of users who prefer the brands because “it’s unique” (14%), “it’s popular” (8%) or “expensive, so it must be good” (5%).

Three percent do not know why they made their choices.

Brand affinities are again strong and 98% will recommend these brands to others. Fifty three percent of respondents “will tell people how great” their preferred brands are and 26% will make recommendations because they trust the brand. Thirteen percent will make referrals if asked for advice and 4% will if they have tried it. Product promotions are likely to inspire referrals among 2% of respondents.

*When you think of financial services, which is the best brand that comes to mind?*



**Chart 17**

Among Financial Services, Kenya Commercial Bank came in tops at 53%. The Central Bank of Kenya (14%) and Bank of Africa (9%) are 3<sup>rd</sup> and 4<sup>th</sup> ranked. Other banks (24%) collectively in 2<sup>nd</sup> place are Barclays, Standard Chartered and Posbank.

The selection of financial services is based first on performance factors (71%): the “most trustworthy” (43%), variety of products (18%) and “been around a long time (10%)”. One percent of respondents do not know why they made their choices.

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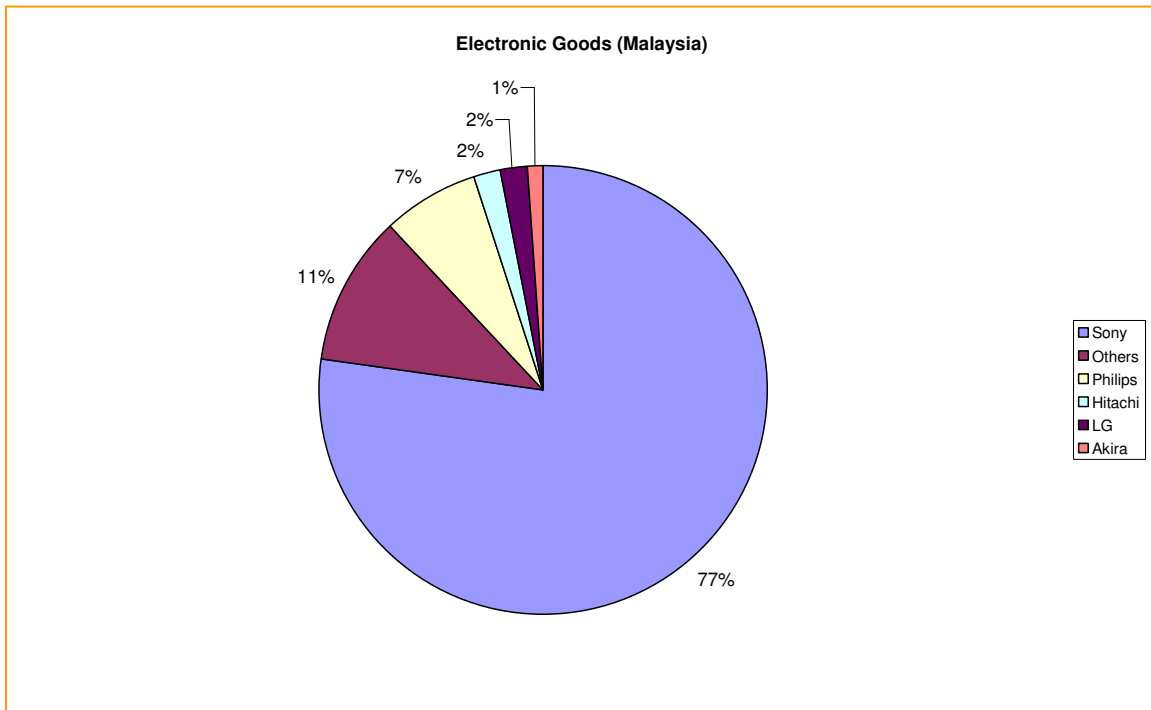
The price factor (lowest fees or attractive rates) influences 23% of respondents.

Style factors influence 6% of respondents. Among them 2% are influenced because “everyone uses it”, 4% believe it “makes me look good...I want that card”.

Brand affinities are again strong and 98% will recommend their financial service providers to others. Forty six percent of respondents “will tell people how great” their preferred brands are and 38% will make recommendations because they trust the brand. Twelve percent will make referrals if asked for advice and .....% will if they have tried it. Product promotions are NOT likely to inspire referrals among respondents.

## Malaysia

*When you think of electronic goods, which is the best brand that comes to mind?*



**Chart 18**

Sony (77%) ranked tops with Philips a distant 3rd (7 %). A collection of other brands (11%) are ranked 2<sup>nd</sup> (and probably include Aiwa, Electrolux, Fagor, Haier, Hitachi, Samsung, Sharp etc).

Hitachi and LG are in joint 4<sup>th</sup> place with 2% each. Notable is relative newcomer, Akira, (audio-visual, household and home Appliances) among 1% of respondents.

The choice of brands are based largely on performance factors (87%): the “best quality” (85%) and “they are tried and tested’ (2%)

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Style factors in have a significant (10%) influence among respondents. Among them 6% are influenced by the products' popularity, 2% believe its "unique" and 2% are influenced by premium pricing.

Price factor (value for money) influences 4% of respondents.

One percent of respondents do not know why they chose the brands.

Brand affinities are again strong and 99% will recommend these brands to others. Seventy percent of respondents "will tell people how great" their preferred brands are and 14% will make recommendations because they trust the brand. Eight percent will make referrals if asked for advice and 4% will if they have tried it.

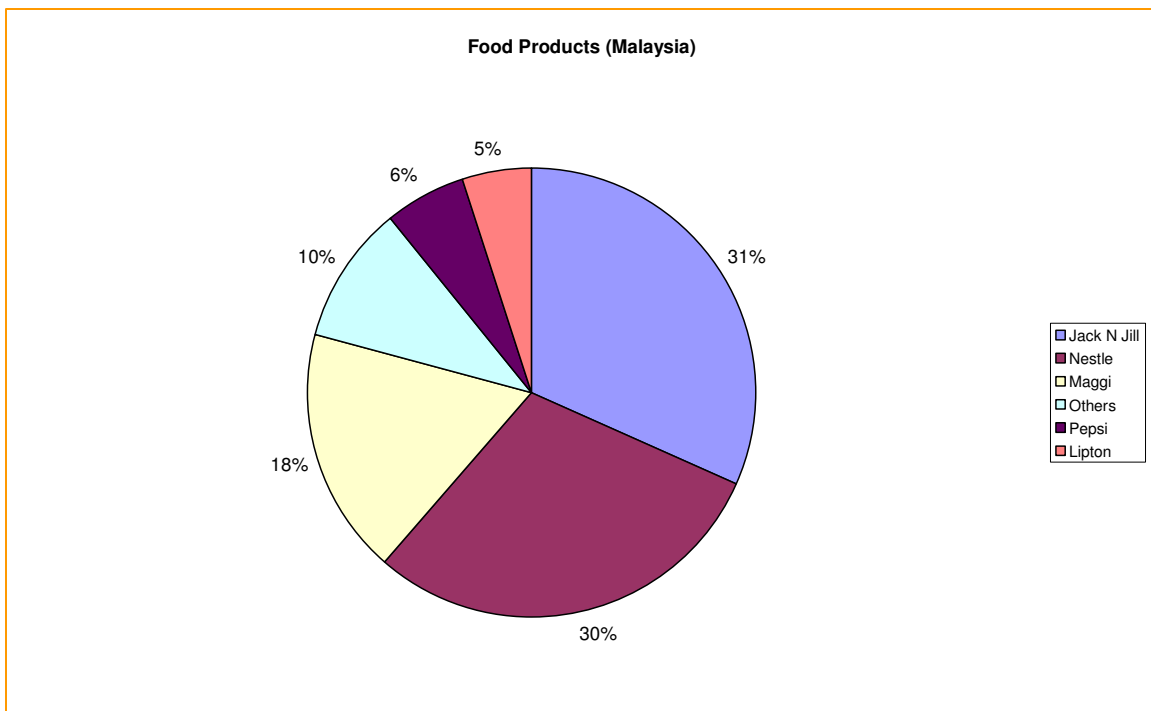
Product promotions are likely to inspire referrals among only 3% of respondents.

*When you think of food products, which is the best brand that comes to mind?*

Among food products the Jack N Jill (snacks by URC of Philippines) is in 1st place (31%) narrowly leading Nestlé (30%) in 2<sup>nd</sup> place and with Maggi (18%) in 3<sup>rd</sup> place.

Refreshment brands Pepsi 5% and Lipton 5% (Unilever) are in 5<sup>th</sup> and 6<sup>th</sup> place respectively. In 4<sup>th</sup> place are an assortment of brands likely to include Mamee, Apollo, Twisties, Super Ring, etc)

Collectively, Nestlé brands (including Maggi) command 48% of votes.



**Chart 19**

As in other product sectors, the affinity with food brands are based first on performance factors (61%): the “best quality” (55%) and “they are tried and tested’ (5%)

Price factor (value for money) is a major influence among respondents. - 19% say its best value for money

Style factors matter to 17% of mobile surfers in this market, 11% say that it’s popular, 5% say it’s unique and makes me stand out and one percent say that “it’s expensive so it must be good”.

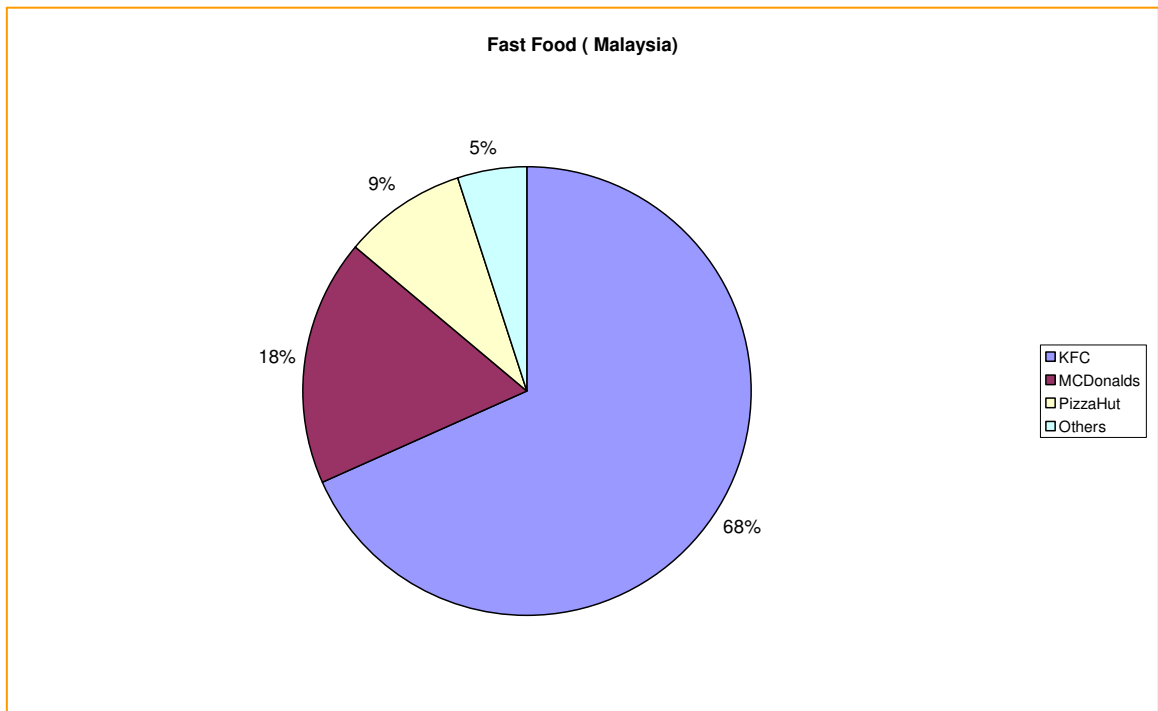
Three percent do not know why they made their choices

Brand affinities are again strong and 98% will recommend these brands to others. Sixty percent of respondents “will tell people how great” their preferred brands are and 20% will make recommendations because they trust the brand. Thirteen percent will make referrals if asked for advice and 5% will if they have tried it.

Product promotions are likely to inspire referrals among only 3% of respondents.

*When you think of fast food, which is the best brand that comes to mind?*

Among Malaysian mobile users, the KFC brand is dominant at 68% and Pizza Hut is a distant second (18%) and Pizza Hut is 3rd at 9%.



**Chart 20**

Choices are made based on performance factors (58%): the “best quality” (53%) and “they are tried and tested’ (5%)

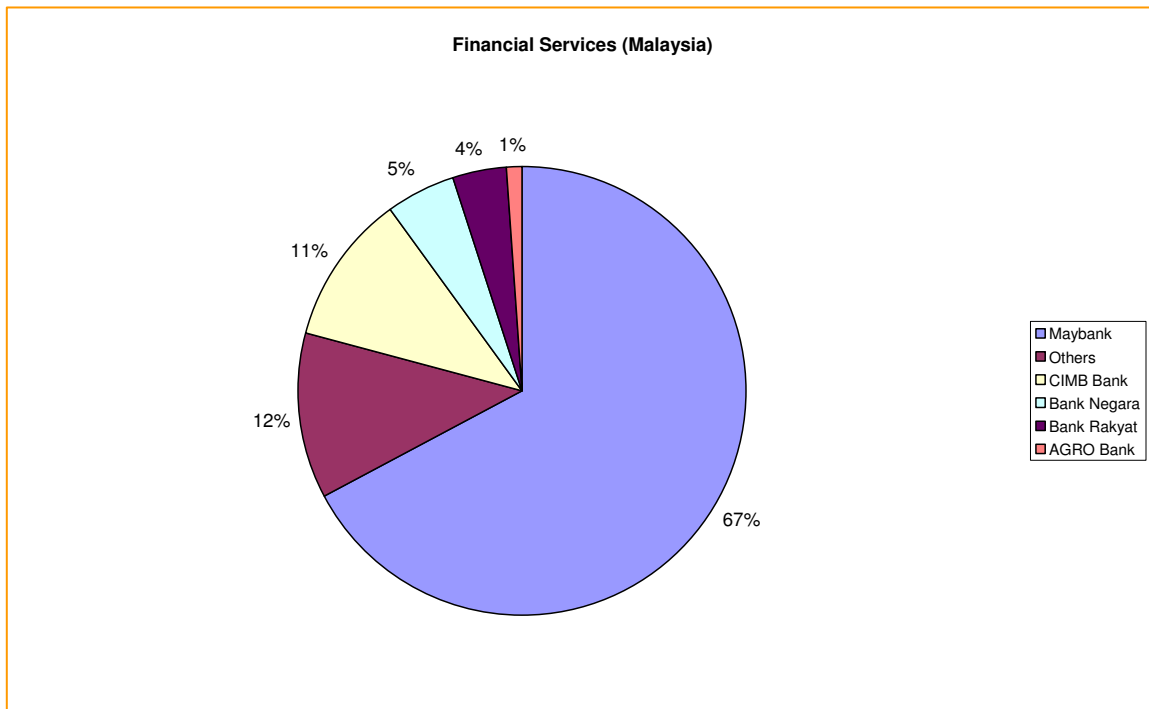
Style factor have a high (24%) influence among respondents. Among them 18% are influenced by the products’ popularity, 5% believe its “unique” and 1% are influenced by premium pricing.

Price factor (value for money) is a major influence among 16% of respondents.

Brand affinities are again strong and 99% will recommend these brands to others. Seventy six percent of respondents “will tell people how great” their preferred brands are and 13% will make recommendations because they trust the brand and six percent will make referrals if asked for advice.

Product promotions are likely to inspire referrals among 4% of respondents.

*When you think of financial services, which is the best brand that comes to mind?*



**Chart 21**

Among financial services in Malaysia, Maybank is ranked first among 67% of mobile users with CIMB (11%) at 3<sup>rd</sup> place. Notable as a brand is Bank Negara (5%), in 4<sup>th</sup> place which is not a commercial bank but functions as the circulation and central bank.

In 5<sup>th</sup> and 6<sup>th</sup> place are Bank Rakyat and AGRO bank. Also notable are 'others' (12%) in 2<sup>nd</sup> place. This is likely to include Public Bank, Bank Islam, AmBank, RHB Bank, Hong Leong Bank etc.

The selection of financial services is largely based on performance factors (88%): the “most trustworthy” (77%), variety of products (4%) and “been around a long time (7%)”. One percent doesn’t know.

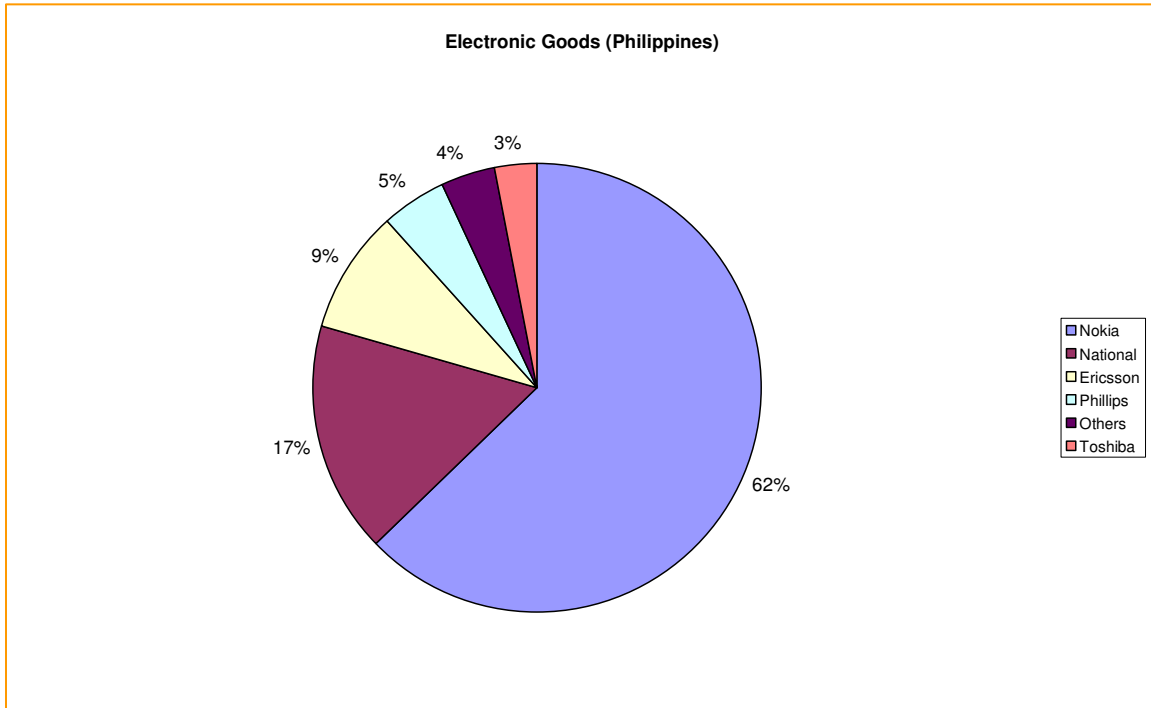
The price factor (lowest fees or attractive rates) influences 8% of respondents.

Style factors influences 3% of respondents. Among them 1% are influenced because “everyone uses it”, 2% believe it “makes me look good...I want that card”.

Brand affinities are very strong and all (100%) will recommend their financial service providers to others. Sixty three percent of respondents “will tell people how great” their preferred brands are and 23% will make recommendations because they trust the brand. Eight percent will make referrals if asked for advice and 5% will if they have tried it. Product promotions are likely to inspire referrals among 1% of respondents.

## Philippines

*When you think of electronic goods, which is the best brand that comes to mind?*



**Chart 22**

Nokia is tops among electronics goods (62%) followed by National (Panasonic) at 17%. In 3rd place is Ericsson at 9%.

As in Egypt, the National brand continues to linger among respondents and suggests the need for a brand awareness campaign.

Affinity with these brands are based first on performance factors among 75% of respondents: 51% say their preferred brand is the best quality, 24% say it's "tried and tested".

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Style factors are a major influence among 16% of respondents. Among them 9% are influenced by the products' popularity, 6% believe its "unique" and 1% are influenced by premium pricing.

Price factor (value for money) is a major influence among 8% of respondents.

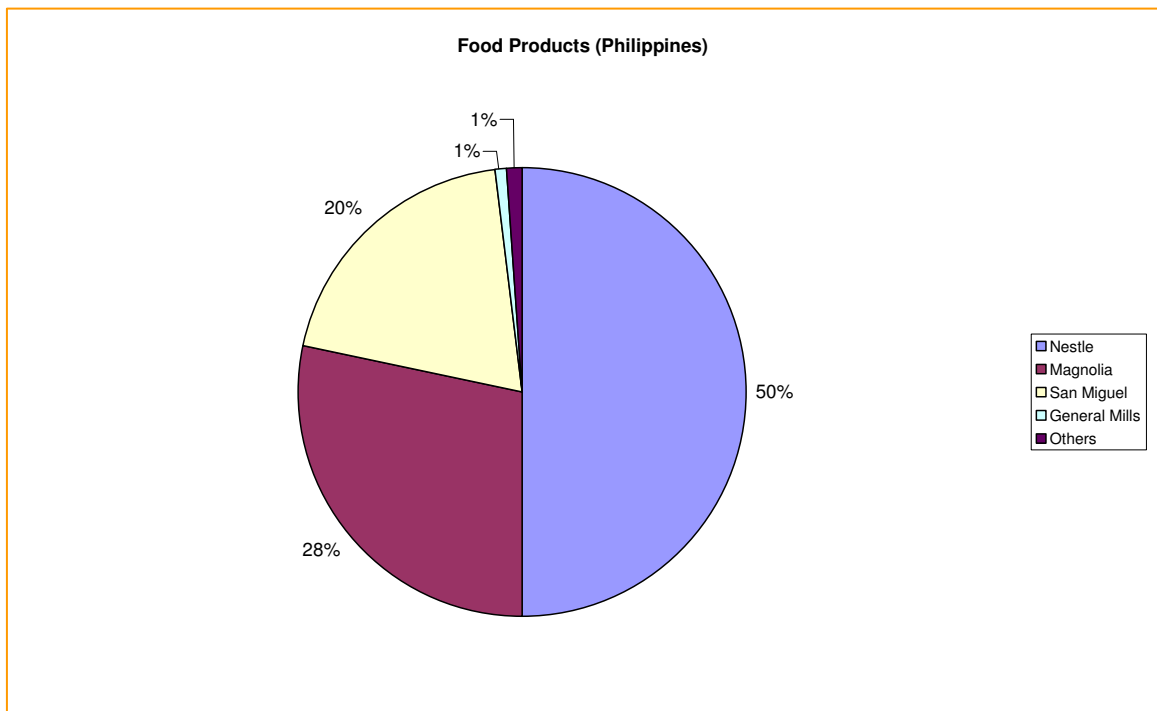
One percent of respondents do not know why they made their choices.

Brand affinities are again strong and 99% will recommend these brands to others. Sixty eight percent of respondents "will tell people how great" their preferred brands are and 25% will make recommendations because they trust the brand. Four percent will make referrals if asked for advice and 2% will if they have tried it. Product promotions are NOT likely to inspire referrals among of respondents.

*When you think of food products, which is the best brand that comes to mind?*

Among food Nestlé is tops (50%) with Magnolia (dairy products, cooking oil, desserts and snacks) and San Miguel (food and beverage) in joint 2<sup>nd</sup> and 3<sup>rd</sup> place with 20% each. General Mills (makers of Häagen-Dazs ice cream, Pillsbury baking mixes & Progresso soups) are in 4<sup>th</sup> place with 1%.

Collectively San Miguel brands (including Magnolia) command 40% of mobile user votes but still come in 2<sup>nd</sup> to Nestlé.



**Chart 23**

Choice of brands are based first on performance factors (83%): the “best quality” (67%) and “they are tried and tested’ (16%)

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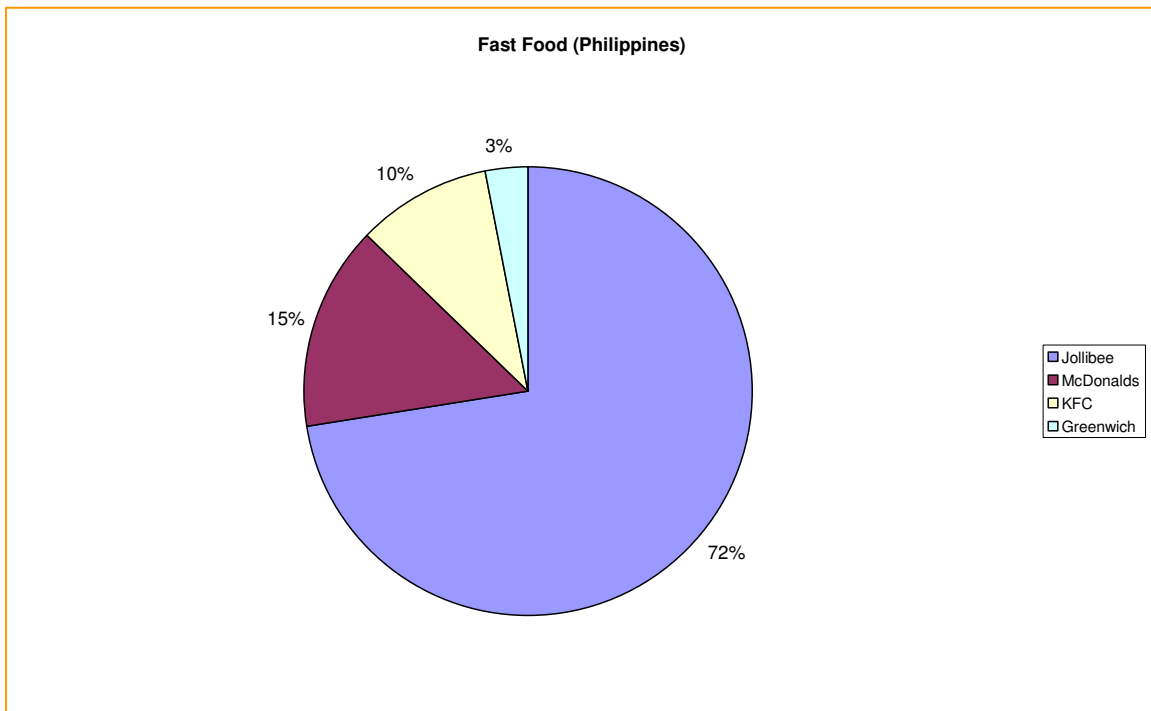
Price factor (value for money) is a major influence among 10% of respondents.

The style factor influenced 7% of respondents who say their chosen brand is 'popular'.

Brand affinities are again strong and 99% will recommend these brands to others. Sixty eight percent of respondents "will tell people how great" their preferred brands are and 25% will make recommendations because they trust the brand. Five percent will make referrals if asked for advice and 1% will if they have tried it.

Product promotions are NOT likely to inspire referrals among respondents.

*When you think of fast food, which is the best brand that comes to mind?*



**Chart 24**

Among fast food Jollibee (hamburger, ice cream) is first at 72% followed by McDonald's (15%) and KFC (10%). Greenwich (pizza) is in 4<sup>th</sup> place with 3%.

Collectively Jollibee (including Greenwich) commands 72% of user votes.

As in other product sectors, the affinity with fast food brands are based first on performance factors (66%): the "best quality" (60%) and "they are tried and tested" (6%)

Price factor (value for money) is a major influence among 26% of respondents.

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The style factor influences 8% of respondents. Among them 7% are influenced by the products' popularity and 1% believe its "unique".

Brand affinities are again strong and 97% will recommend these brands to others. Seventy two percent of respondents "will tell people how great" their preferred brands are and 17% will make recommendations because they trust the brand. Nine percent will make referrals if asked for advice and 1% will if they have tried it. Product promotions are NOT likely to inspire referrals among respondents.

*When you think of financial services, which is the best brand that comes to mind?*

In financial services sector Bank of Philippines Island (46%) is 1<sup>st</sup> and Philippines National Bank (26%) is in 2<sup>nd</sup> place with Land bank of Philippines in 3<sup>rd</sup> place with 17% votes.

(At present, there are seventeen universal banks, 23 commercial banks, 84 thrift banks, 711 rural banks, 44 credit unions and twelve non-banks with quasi-banking functions, all licensed with the Bangko Sentral ng Pilipinas.)

Other financial services (eg Insurance) do not seem to have made a brand impression among Filipino mobile users.

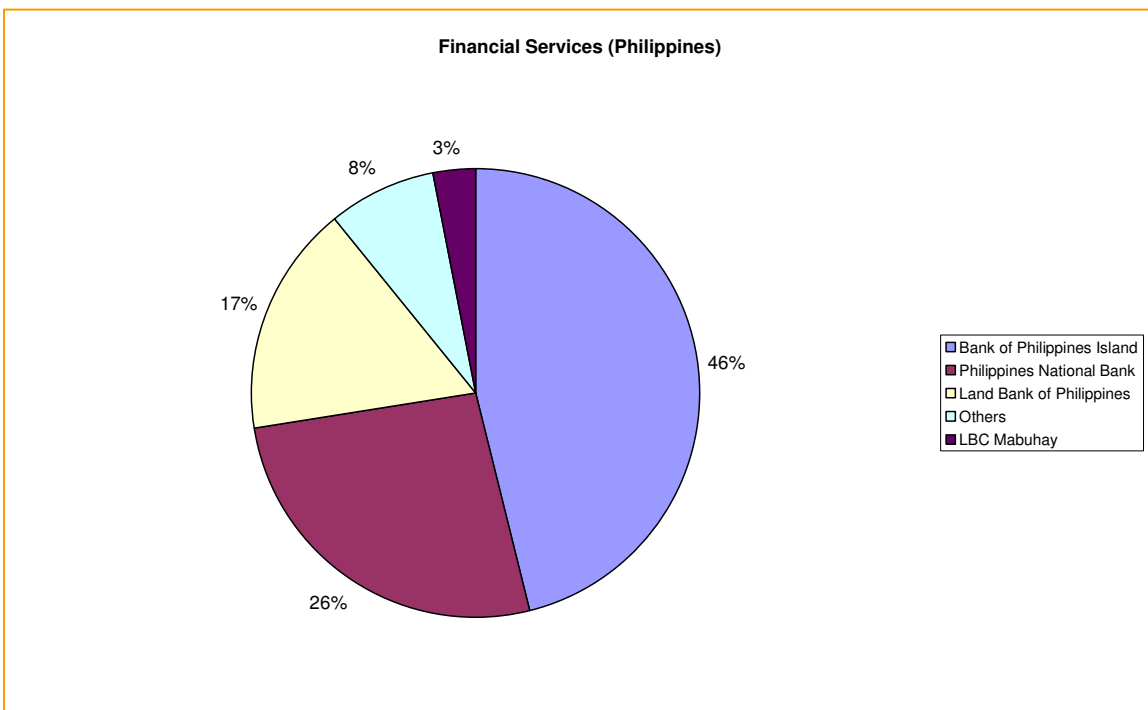


Chart 25

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The selection of financial services are based first on performance factors (91%): the “most trustworthy” (77%), variety of products (8%) and “been around a long time (6%)”

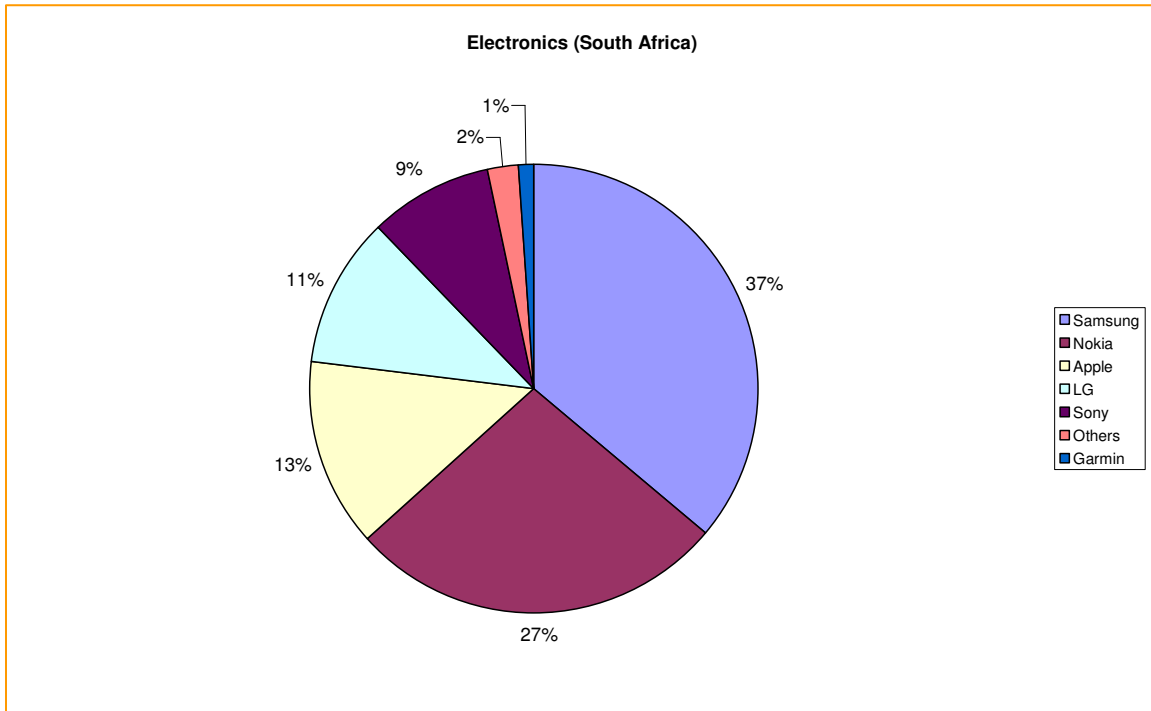
The price factor (lowest fees or attractive rates) influences 5% of respondents.

Style factors influences 3% of respondents because “everyone uses it”

Brand affinities are again strong and 99% will recommend their financial service providers to others. Sixty four percent of respondents “will tell people how great” their preferred brands are and 25% will make recommendations because they trust the brand. Seven percent will make referrals if asked for advice and 2% will if they have tried it. Product promotions are likely to inspire referrals only among 1% of respondents.

## South Africa

*When you think of electronic goods, which is the best brand that comes to mind?*



**Chart 26**

Among South Africans, Samsung ranks tops at 37% followed by Nokia (13%) in second place. Apple (13%) is 3<sup>rd</sup> with LG (11%) a close 4<sup>th</sup>. Sony is ranked 5<sup>th</sup> (9%). ‘Others’ (2%) are likely to include brands like Sharp, Bosch, Siemens etc. and in 7<sup>th</sup> place is Garmin (GPS & navigation equipment).

As in other product sectors, the affinity with electronics brands are based largely on performance factors (68%): the “best quality” (55%) and “they are tried and tested’ (13%)

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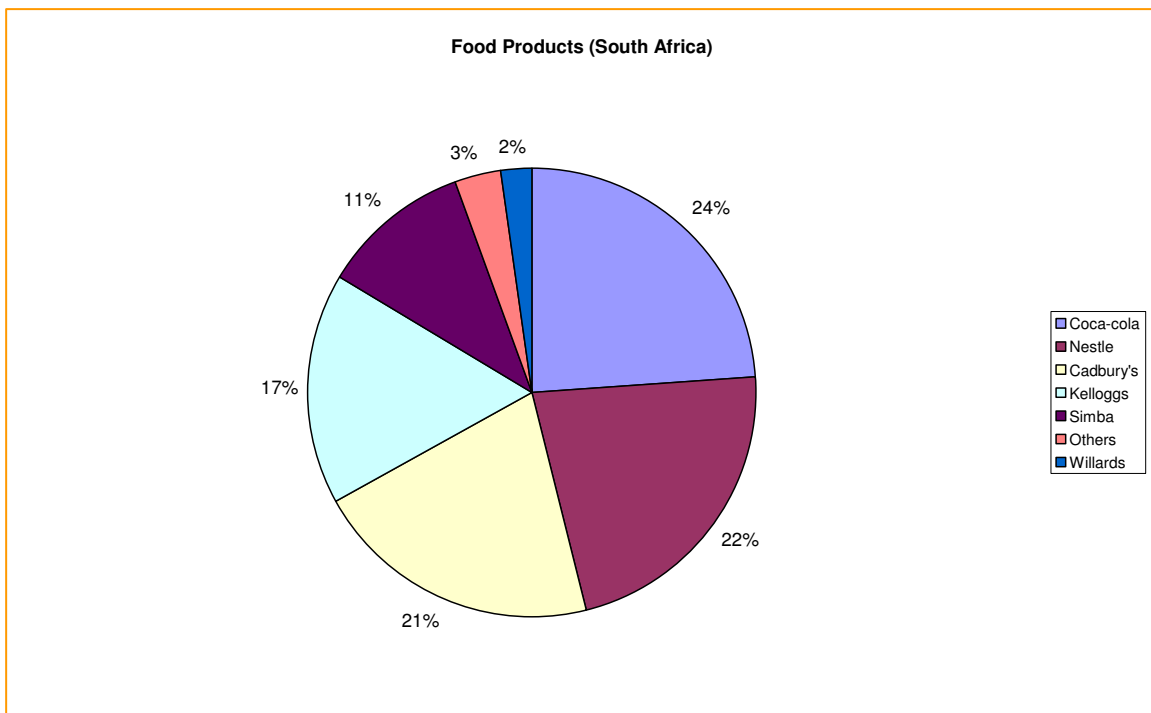
The style factor influences 18% of respondents. Among them 11% believe its “unique”, 4% are influenced by the products’ popularity, and 3% are influenced by premium pricing.

Price factor (value for money) is a major influence among 14% of respondents.

Brand affinities are again strong and 99% will recommend these brands to others. Forty seven percent of respondents “will tell people how great” their preferred brands are and 45% will make recommendations because they trust the brand. Five percent will make referrals if asked for advice. Product promotions are likely to inspire referrals among 1% of respondents.

*When you think of food products, which is the best brand that comes to mind?*

Of the food products Coca Cola (24%), Nestlé (22%) and Cadbury (21%) are among the top 3 brands among South African mobile users. Kelloggs (cereal) is 4th (17%) followed by Simba (potato chip snack) 11%.



**Chart 27**

As in other product sectors, the affinity with brands are based on performance factors (65%): the “best quality” (48%) and “they are tried and tested’ (17%)

Price factor (value for money) is a major influence among 22% of respondents.

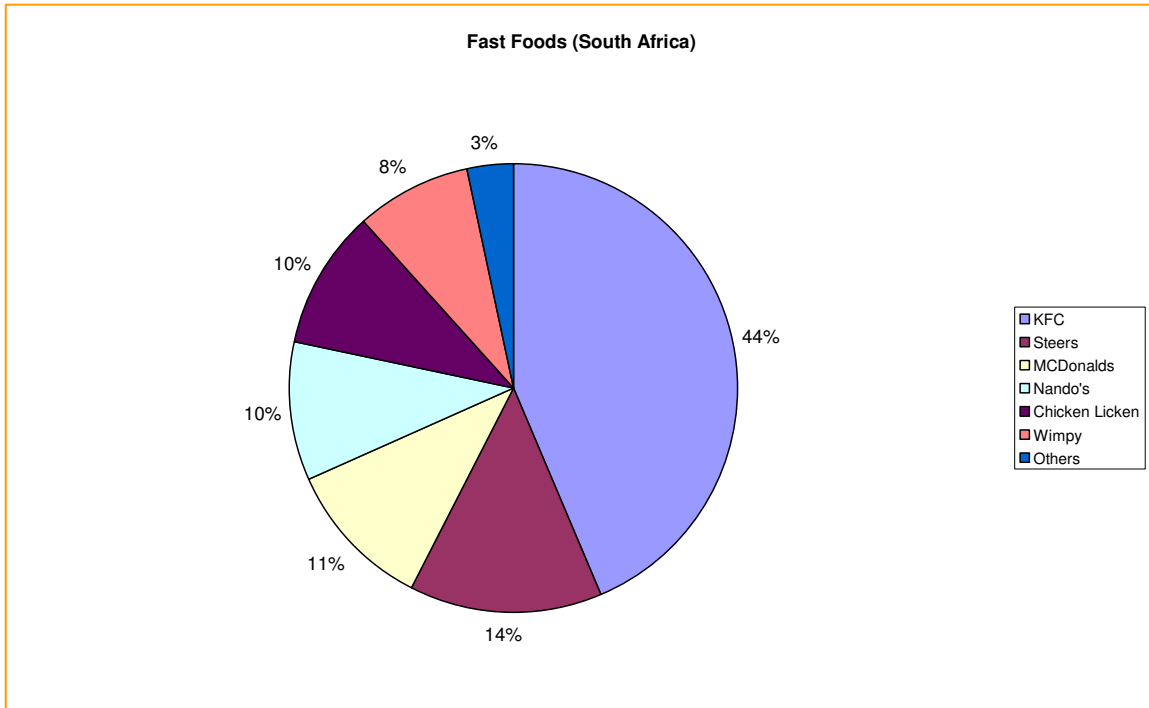
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Style factors influence 11% of respondents. Among them 5% are influenced by the products' popularity, 5% believe its "unique" and 1% are influenced by premium pricing.

Two percent do not know why they made their choices.

Brand affinities are again strong and 99% will recommend these brands to others. Fifty five percent of respondents "will tell people how great" their preferred brands are and 36% will make recommendations because they trust the brand. Four percent will make referrals if asked for advice and 2% will if they have tried it. Product promotions are likely to inspire referrals among 2% of respondents.

*When you think of fast food, which is the best brand that comes to mind?*



**Chart 28**

Among fast foods KFC is tops with 44%. This is followed by Steers (14%), McDonald's (11%), Nando's (10%), Chicken Licken (10%) and Wimpy (8%).

Again, brand choices are based on performance factors (54%): 42% say it's the best quality and 12% say it's "tried and tested"

Price factor (value for money) is a major influence among 30% of respondents.

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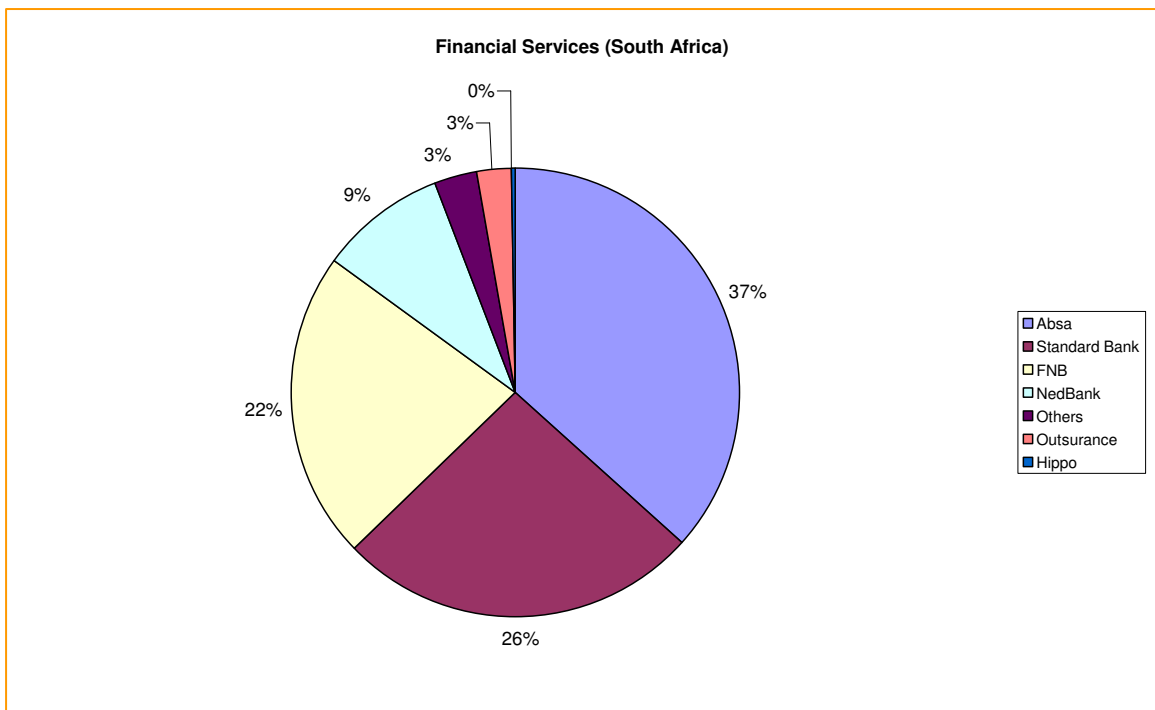
Style factors influence 15% of respondents. Among them 8% are influenced by the products' popularity, 6% believe its "unique" and 1% are influenced by premium pricing.

Brand affinities are again strong and 99% will recommend these brands to others. Sixty percent of respondents "will tell people how great" their preferred brands are and 30% will make recommendations because they trust the brand. Six percent will make referrals if asked for advice and 2% will if they have tried it. Product promotions are likely to inspire referrals among 1% of respondents.

*When you think of financial services, which is the best brand that comes to mind?*

The top three financial services brands among South African mobile users are Absa (37%), Standard Bank (26%) and FNB (9%). Nedbank comes in fourth place with Outsurance 6<sup>th</sup> and Hippo in 7<sup>th</sup> place.

Unique is Hippo which functions as a retailer that aggregates short-term domestic insurance quotes from various providers.



**Chart 29**

The selections of financial services are based mainly on performance factors (68%): the “most trustworthy” (46%), variety of products (13%) and

“been around a long time” (9%). One percent of respondents do not know why they chose the service provider.

The price factor (lowest fees or attractive rates) influences 24% of respondents.

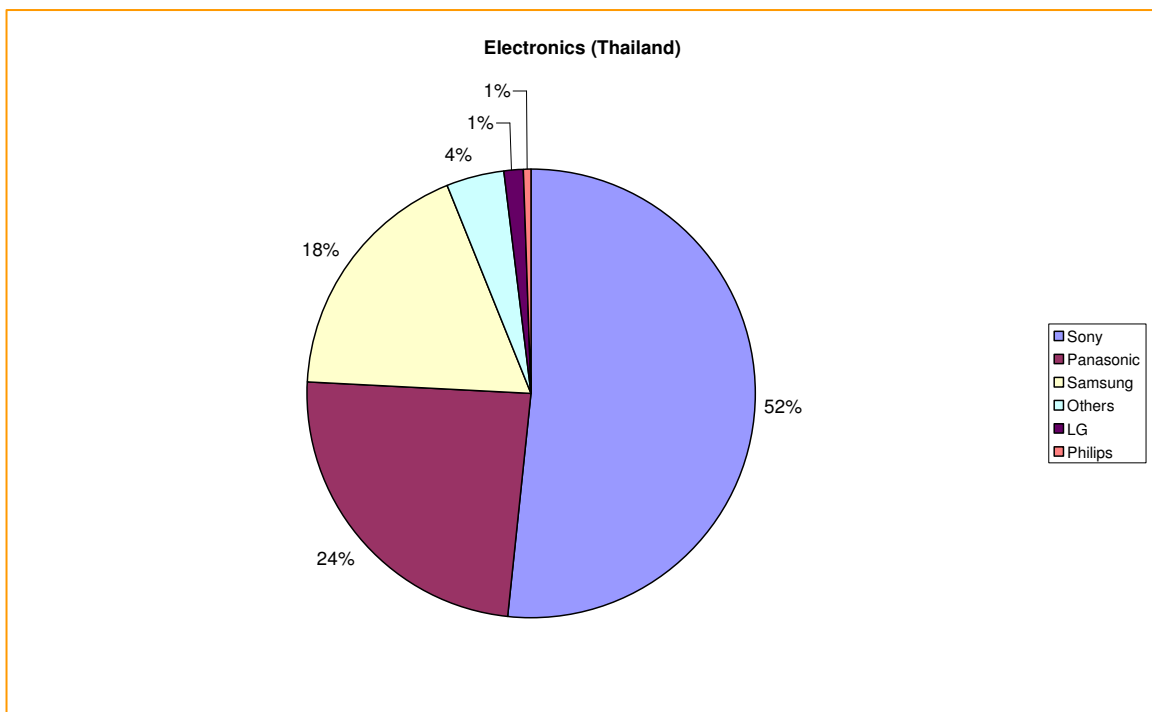
Style factors influence 7% of respondents. Among them 3% are influenced because “everyone uses it”, 4% believe it “makes me look good...I want that card”.

Brand affinities are again strong and 99% will recommend their financial service providers to others. Forty five percent of respondents “will tell people how great” their preferred brands are and 41% will make recommendations because they trust the brand. Eleven percent will make referrals if asked for advice and 1% will if they have tried it. Product promotions are likely to inspire referrals among 1% of respondents.

## Thailand

*When you think of electronic goods, which is the best brand that comes to mind?*

Sony (52%) is the top electronics brand in Thailand followed by Panasonic (24%) and Samsung (18%). LG and Philips are a distant 5<sup>th</sup> and 6<sup>th</sup> scoring 1% each among mobile users.



**Chart 30**

Performance factors rank high among most (85%) respondents: the “best quality” (69%) and “they are tried and tested’ (17%)

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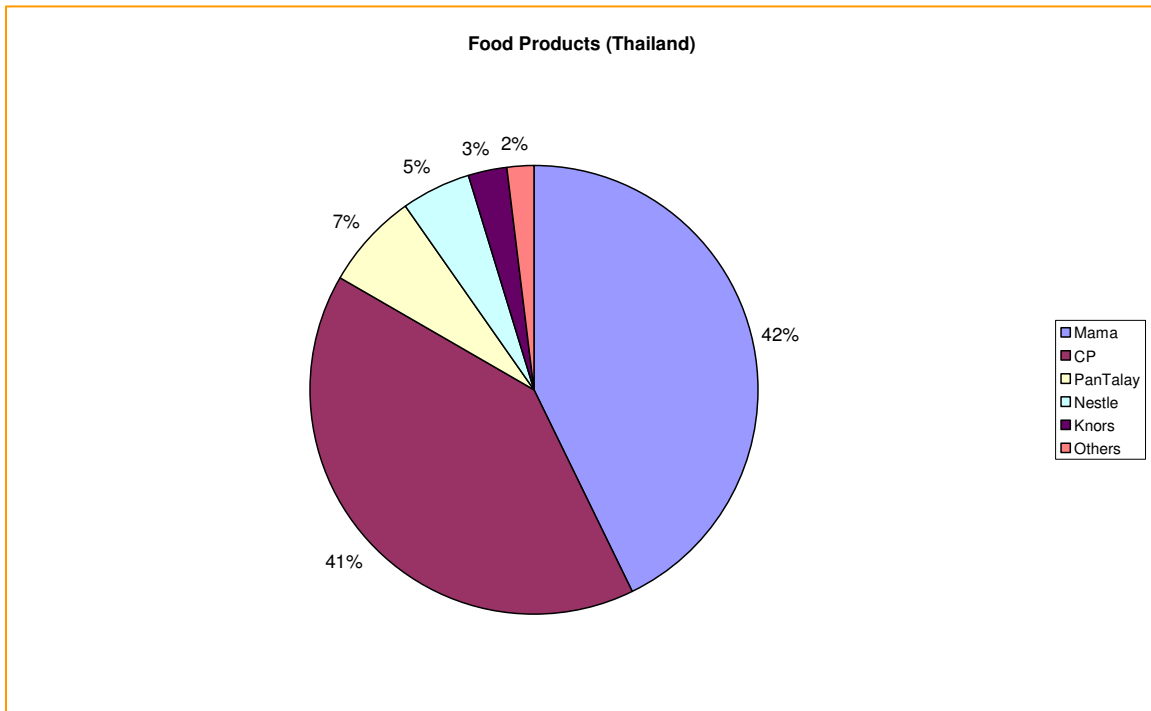
Price factor (value for money) is a major influence among 3% of respondents.

Style factors have a high (8%) influence among respondents. Among them 6% are influenced by the products' popularity, 1% believe its "unique" and 1% are influenced by premium pricing.

Three percent do not know why they made their choices

Brand affinities are again strong and 96% will recommend these brands to others. Thirty four percent of respondents "will tell people how great" their preferred brands are and 30% will make recommendations because they trust the brand. Twenty one percent will make referrals if asked for advice and 6% will if they have tried it. Product promotions are likely to inspire referrals among 5% of respondents.

*When you think of food products, which is the best brand that comes to mind?*



**Chart 31**

Among mobile users in Thailand the Mama<sup>6</sup> (instant noodle) brand is tops -42%. CP Foods<sup>7</sup> (fresh and cooked products) are a very close second with 41% . Pan Talay (frozen and ready-to-eat seafood products) are in 3<sup>rd</sup> place with 7% votes. Nestlé (7%) and Knorr (5%) are in 4<sup>th</sup> and 5<sup>th</sup> places.

As in other product sectors, the choice of brands are based first on performance factors (59%): the “best quality” (39%) and “they are tried and tested’ (20%)

<sup>6</sup> Mama is a brand of Thai President Foods Public Company Limited

<sup>7</sup> CP Foods is a subsidiary of Charoen Pokphand Group

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Price factor (value for money) is a major influence among 34% of respondents.

Style factors influence 5% of the respondents. Among them 4% are influenced by the products' popularity and 1% are influenced by premium pricing.

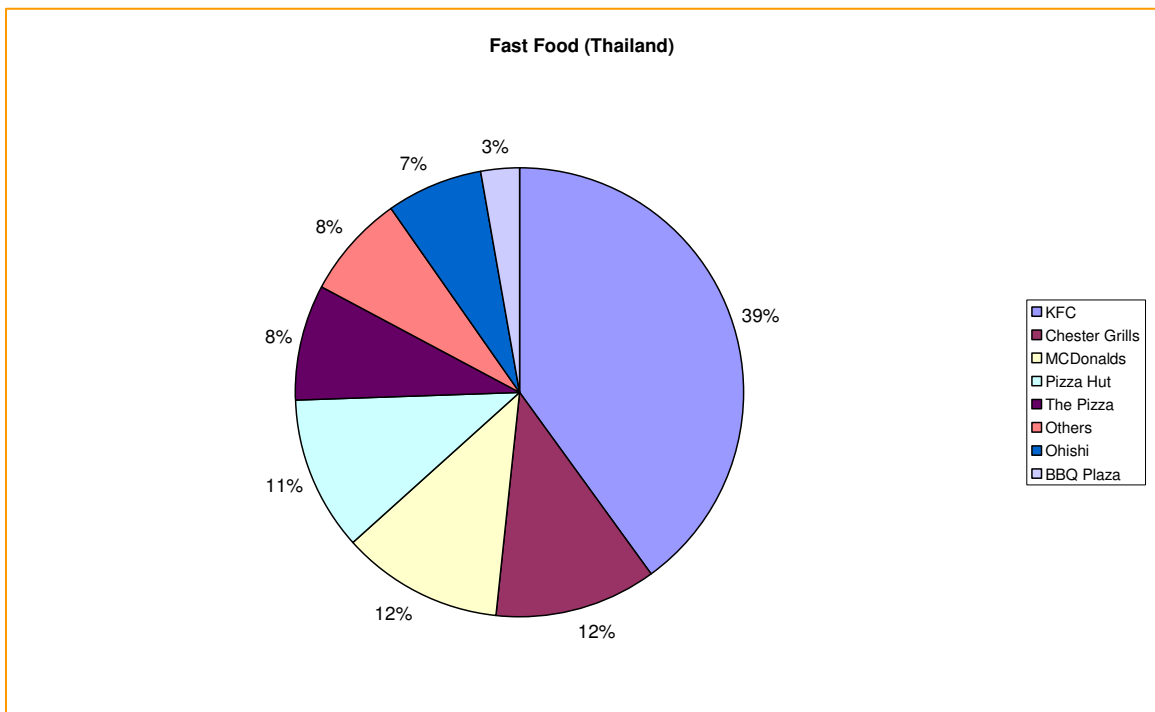
Two percent do not know why they made their choices.

Brand affinities are again strong and 95% will recommend these brands to others. Forty six percent of respondents "will tell people how great" their preferred brands are and 21% will make recommendations because they trust the brand. Twenty two percent will make referrals if asked for advice and 1% will if they have tried it. Product promotions are likely to inspire referrals among 5% of respondents.

*When you think of fast food, which is the best brand that comes to mind?*

KFC has 39% followed by Chester's Grill (12%), McDonald's (12%) and Pizza Hut (11%).

Chester's Grill is a grilled chicken and coffee outlet owned by CP Foods (Charoen Pokphand Group).



**Chart 32**

The choice of brands are made largely on performance factors 73%: the “best quality” (35%) and “they are tried and tested’ (38%)

Price factor (value for money) is a major influence among 14% of respondents.

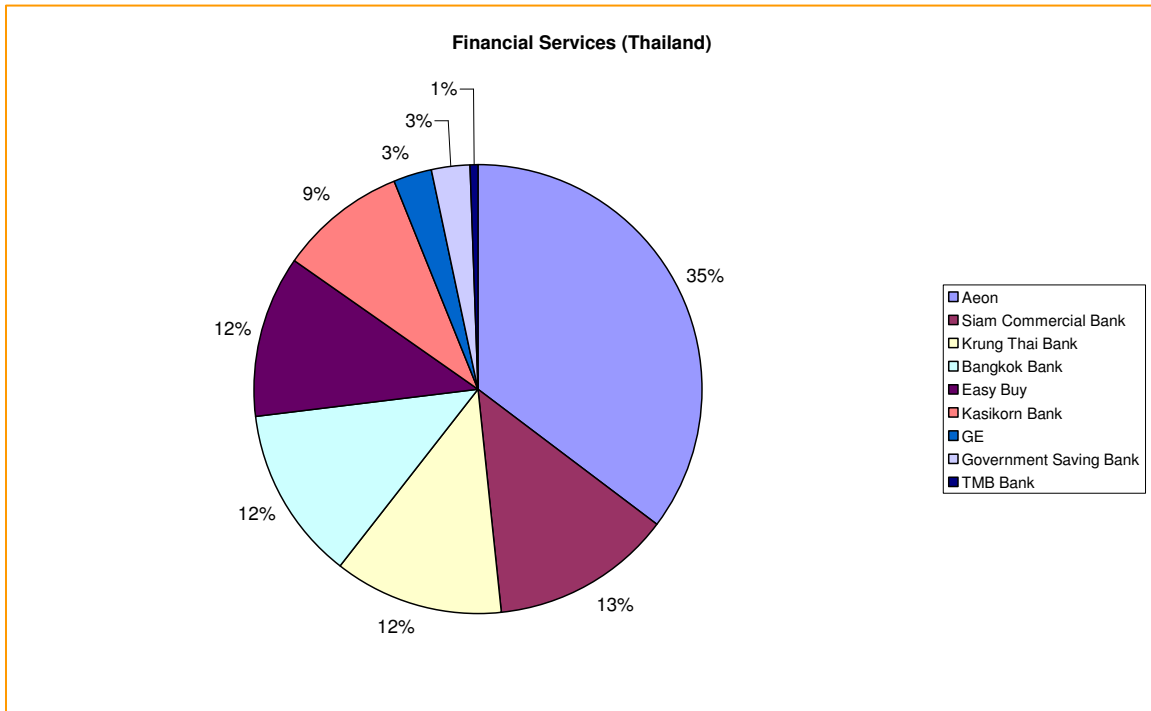
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Style factors influence 7% of respondents: 3% are influenced by the products' popularity, 1% believe its "unique" and 3% are influenced by premium pricing.

Six percent do not know why they made their choices.

Brand affinities are again strong and 94% will recommend these brands to others. Forty six percent of respondents "will tell people how great" their preferred brands are and 19% will make recommendations because they trust the brand. Fifteen percent will make referrals if asked for advice and 5% will, if they have tried it. Product promotions are NOT likely to inspire referrals.

*When you think of financial services, which is the best brand that comes to mind?*



**Chart 33**

Top among financial services brands in Thailand is Aeon (35%) provider of retail finance services; hire purchase, credit card & personal loans. This is followed by Siam Commercial Bank (13%), Krung Thai Bank (12%), Bangkok Bank (12%), Easy Buy (12%) and Kasikorn Bank (9%). In 7<sup>th</sup>, 8<sup>th</sup> and 9<sup>th</sup> places are GE Money (3%), Government Savings Bank (1%) and TMB Bank (1%).

Notable among the list are providers of consumer finance services (Aeon, Easy Buy and GE Money) who reinforce the presence of consumerist spending among mobile users, particularly in Thailand.

The selection of financial services are based primarily on performance factors (81%): the “most trustworthy” (54%), variety of products (18%) and “been around a long time (9%)”

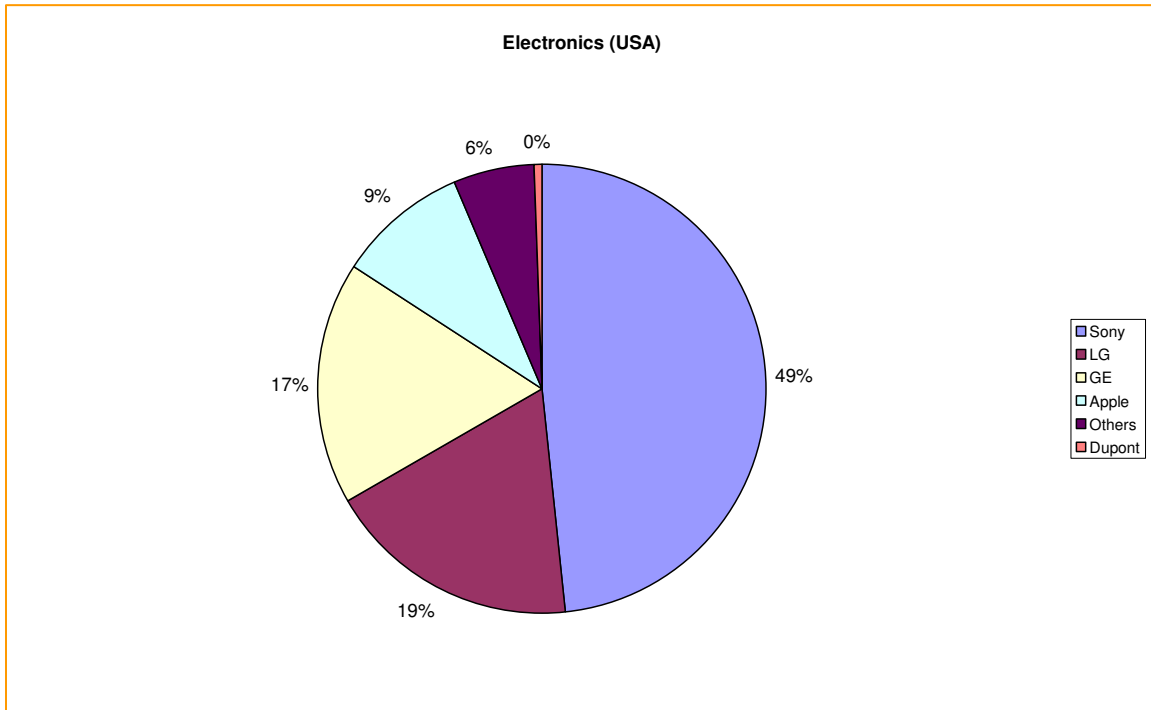
The price factor (lowest fees or attractive rates) influences 7% of respondents.

The style factor(s) influences 6% of respondents because “everyone uses it”. Another 6% do not know why they chose the brand.

Brand affinities are again strong and 96% will recommend their financial service providers to others. Forty one percent of respondents “will tell people how great” their preferred brands are and 26% will make recommendations because they trust the brand. Seventeen percent will make referrals if asked for advice and 5% will if they have tried it. Product promotions are likely to inspire referrals among 7% of respondents.

## United States

*When you think of electronic goods, which is the best brand that comes to mind?*



**Chart 34**

Among US mobile surfers, Sony ranked tops among 49% of respondents. At 2nd and 3rd places were LG Electronics (17%) and GE (9%). Apple was 4th (at 9%).

The affinity with brands are based first on performance factors among 62% of mobile users in the US: among them, citing the “best quality” (46%) and “they are tried and tested’ (16%) as their primary reasons.

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Price factor (value for money) is a major influence among 25% of respondents.

Style factors influence 8% of respondents. Among them 5% are influenced by the products' popularity, 2% believe its "unique" and 1% are influenced by premium pricing.

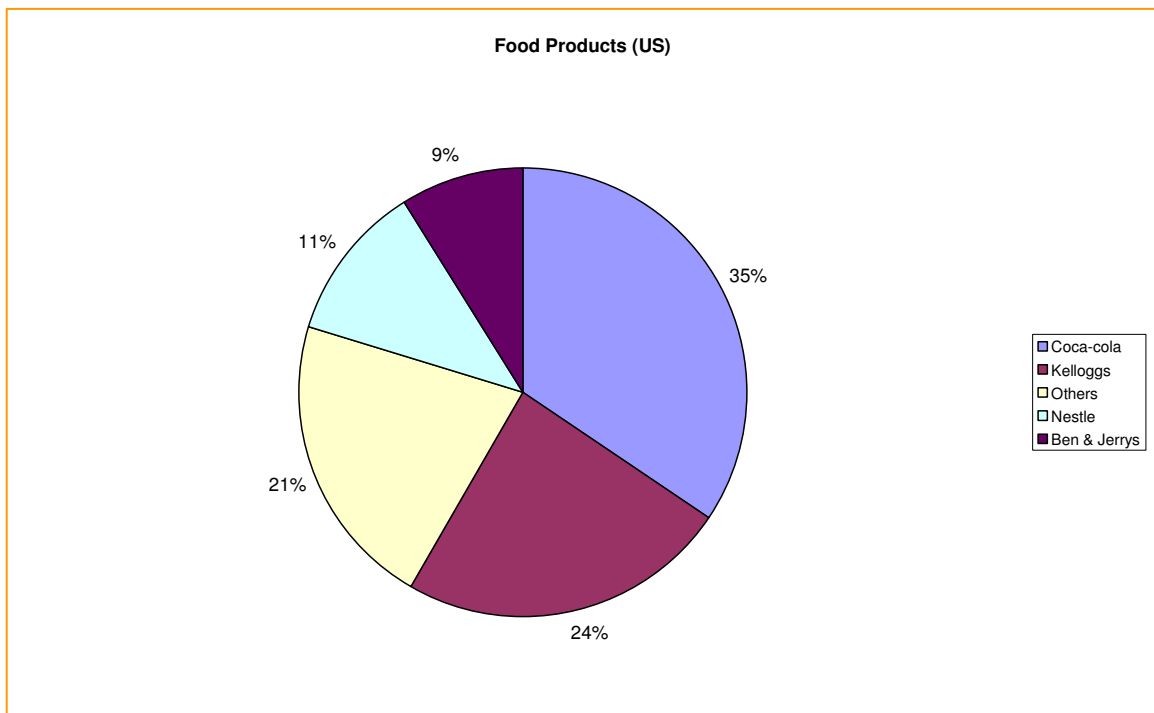
Five percent do not know why they made their choices.

Brand affinities are again strong and 99% will recommend these brands to others. Thirty seven percent of respondents "will tell people how great" their preferred brands are and 42% will make recommendations because they trust the brand. Eight percent will make referrals if asked for advice and 11% will if they have tried it. Product promotions are likely to inspire referrals among 1% of respondents.

*When you think of food products, which is the best brand that comes to mind?*

Coca Cola (35%) ranked first among food products, followed by Kellogg’s (breakfast cereal and various convenience foods), 24%, in second place. In 4th place is Nestlé (11%) and Ben & Jerry’s (9%) are ranked 5th.

As in other countries and categories a high scoring ‘Others’ (21%) underscores the presence of numerous consumer brands and the choices consumers need to make.



**Chart 35**

Brand selection is based first on performance factors (62%): the “best quality” (50%) and “they are tried and tested’ (12%)

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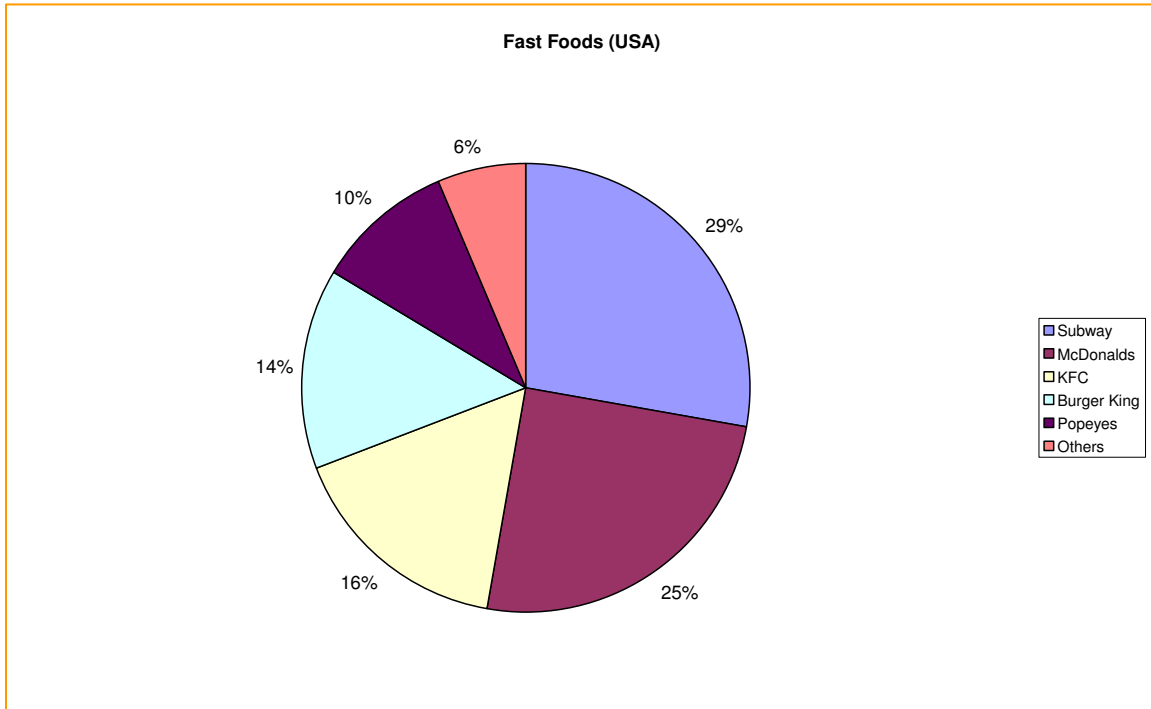
Price factor (value for money) is a major influence among 21% of respondents.

Style factors influence 10% of respondents. Among them 6% are influenced by the products' popularity, 4 % believe it's "unique....makes me stand out".

Seven percent do not know why they made their choices.

Brand affinities are again strong and 98% will recommend these brands to others. Fifty six percent of respondents "will tell people how great" their preferred brands are and 33% will make recommendations because they trust the brand. Six percent will make referrals if asked for advice. Product promotions are likely to inspire referrals among 3% of respondents.

*When you think of fast food, which is the best brand that comes to mind?*



**Chart 36**

Among mobile users in the US, Subway (29%) and McDonald's (25%) are a close first and second. In close 3rd and 4th place are KFC (16%) and Burger King (14%).

This result invariably invites comparisons against the acknowledged Big 3 of quick service restaurants; McDonald's, Burger King and Wendy's in order of 2008 ranking. Noticeably absent is Wendy's (as are Starbucks, Taco Bell and Pizza Hut).

Choices users make are based first on performance factors (49%): the "best quality" (43%) and "they are tried and tested" (6%)

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Price factor (value for money) is a major influence among 40% of respondents.

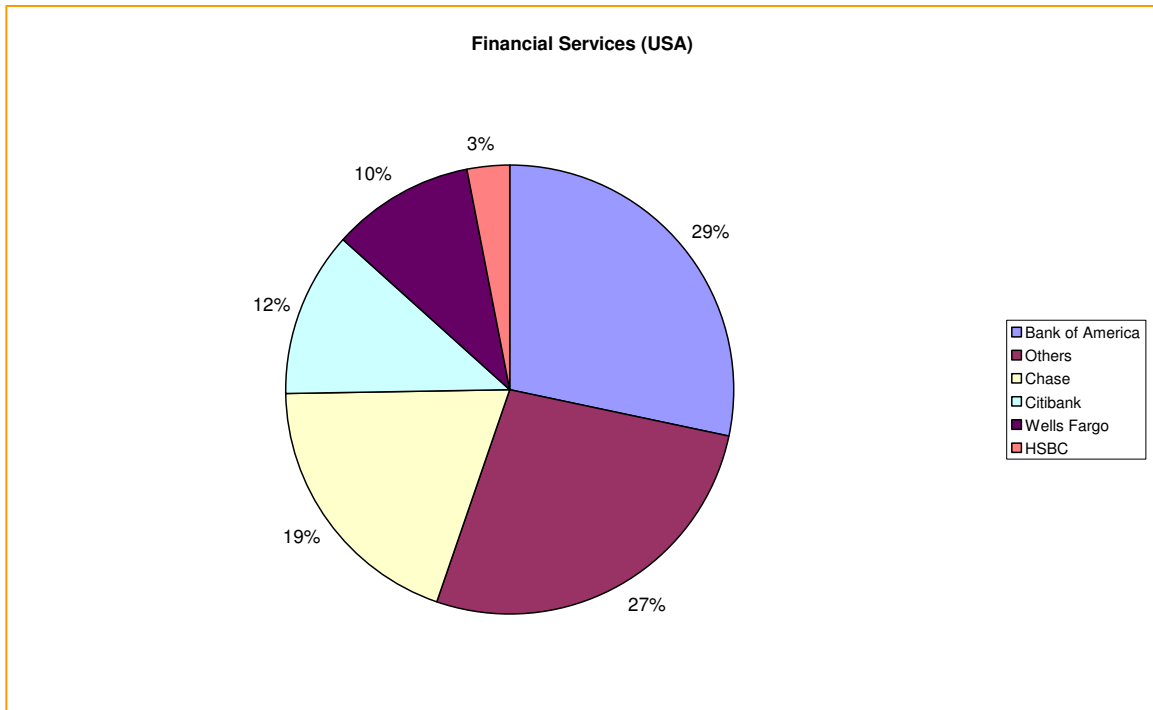
Style factors influence 10% of respondents. Among them 5% are influenced by the products' popularity and 5% believe its "unique".

Three percent do not know why they made their choices

Compared to the rest of the network, brand affinities with fast food brands are lower in the US but still, 85% will recommend these brands to others. Fifty eight percent of respondents "will tell people how great" their preferred brands are and twenty eight will make recommendations because they trust the brand. Seven percent will make referrals if asked for advice and 3% will if they have tried it. Product promotions are likely to inspire referrals among 3% of respondents.

*When you think of financial services, which is the best brand that comes to mind?*

Among mobile surfers in the US, 29% voted Bank of America as their best financial services brand with Chase (19%) and Citibank (12%) in 2<sup>nd</sup> and 3<sup>rd</sup> place respectively. A high scoring 'Others', (27%) again suggests a range of choices available to the consumer in this market sector.



**Chart 37**

The selection of financial services are based first on performance factors (59%): the “most trustworthy” (35%), variety of products (8%) and “been around a long time (16%)”

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The price factor (lowest fees or attractive rates) influences 21% of respondents.

Style factors influences 7% of respondents. Among them 4% are influenced because “everyone uses it”, 3% believe it “makes me look good...I want that card”.

Brand affinities are again strong and 96% will recommend their financial service providers to others. Thirty one percent of respondents “will tell people how great” their preferred brands are and 35% will make recommendations because they trust the brand. Eighteen percent will make referrals if asked for advice and 9% will if they have tried it. Product promotions are likely to inspire referrals among 3% of respondents.

## 6. Conclusions / Recommendations

Beyond the listings of favoured brands, a few observations on brand opportunities become obvious:-

1. The 'unwired' consumers may be in the lower income bracket but are no less discerning in their choices than any other groups of consumers, and base their selections on brand performance first ( i.e. quality, reliability), then style and price factors.
2. Price is not the uppermost factor; often factors of style outweigh price. This is particularly noticeable in Bangladesh, Egypt, India, Indonesia, Kenya, Malaysia and The Philippines and is not limited to the electronics sector.
3. Mobile surfers can be vociferous brand advocates and will make recommendations to others. Their advocacy however, may not be for sale (as only 4% are likely to make recommendations for product promotions) and brands need to be careful in crafting campaigns that rely on advocates.
4. Many international food brands and fast food franchises are available in the markets surveyed but have a noticeably low profile amongst mobile users (four of each is mentioned in two or more markets). This suggests ample branding opportunities in many markets for numerous brands.
5. The survey also re-affirms the status of electronics & food manufacturers in the consumers' homes - there were no retail brands among the top electronics brands or food brands (only Apple and Sony, among the manufacturers, has its own branded

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storefronts, although not in all markets). Opportunities may yet emerge for retailers to provide services to consumers via online and mobile media (providing also technical support & advice, comparison shopping etc) perhaps as affiliates to manufacturers.

6. The absence of pure play retailers (especially in the electronics and food sectors) is ironically highlighted by the presence of Hippo (in the financial services sector). This suggests that opportunities exist for aggregator type retailers (departmental stores, supermarkets) in any sector to develop their brand to foster sales.

## Recommendations:

1. If brands are to take advantage of advocates who use the mobile internet, more product information needs to be deployed, particularly on mobile sites.
2. Quality, reliability (i.e. tried and tested), value and trust were among the most cited factors among brand advocates. For these reasons, marketers should empower advocates by supporting them with product microsites or previews on mobile. Generally, brands will need more mobile presence.
3. This report acknowledges some brands have developed strategies for mobile media (e.g. Nokia, Samsung and Apple) but among many other brands, no clear strategies have emerged. Some fast food brands have dabbled with mobile centric campaigns and even provided some mobile based services but not on a consistent level. KFC for example offers a store locator via SMS in Malaysia, but not in any other country they operate in.
4. As electronics manufacturers continue their gradual shift towards web based e-commerce, this is also likely to continue onto mobile. The key to sales for many of these brands lie in consumer education. Banks that are already providing m-banking and m-commerce related products will benefit, those who are not, should.
5. On this note, we also believe it is worth reiterating the recommendations made in previous surveys :-
  - a. Step up consumer education, particularly of m-banking and m-commerce services. Go beyond the traditional media. Educate users about the availability of m-banking (and online ticketing services, mobile recharge etc)



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- b. Develop and offer mobile widgets and feeds that make content discovery and consumption easy and more accessible.



## **About BuzzCity**

BuzzCity is a mobile internet media enterprise serving an international customer base of marketers and consumers. Established in 1999 in Singapore, BuzzCity today operates a mobile advertising network that spans 200 countries and the world's leading wireless community, mygamma.com.

BuzzCity's business focuses on two distinct audiences: the newly connected emerging middle class in developing markets and the blue collar sector in developed regions. These "unwired" consumers are accessing the mobile Internet on their phones due to widespread and affordable wireless access.

BuzzCity provides marketers with unprecedented opportunities to reach this audience via its mobile centric media properties and advertising network.

Additional information can be found at [www.buzzcity.com](http://www.buzzcity.com).