



Benefits of brand tracking to grow brands in Africa: Case studies

Webinar

10am SAST, 21 June 2023



Introductions



Caitlin Guillet

Product Manager:
SagaBrand & SagaCube



Janick Pettit

Marketing Manager

Agenda



- 1 Introduction to Sagaci Research
- 2 Benefits of brand tracking
- 3 Case study 1: Assessing the impact of marketing campaigns
- 4 Case study 2: Compare brand performance against the competition
- 5 Case study 3: Assessing the impact of external market shocks
- 6 Case study 4: Compare brand performance between countries
- 7 Case study 5: Be aware of up-and-coming brands
- 8 Case study 6: Diagnose brand strengths and weaknesses
- 9 Solutions by Sagaci Research
- 10 Q&A

An Africa-focused data and analytics firm



Dedicated to the African continent

Operating since 2012



Deep local footprint

12 offices across the continent

Fieldwork in 30+ countries in 2022



Unique datasets available

Covering consumption/FMCG and distribution/trade related topics

Continuously updated



Agile mindset

Flexible methodologies

Fast & design-to-cost approaches

Mix of customized vs. off-the-shelf



Quality focus

Representative online panels

Robust quality control processes

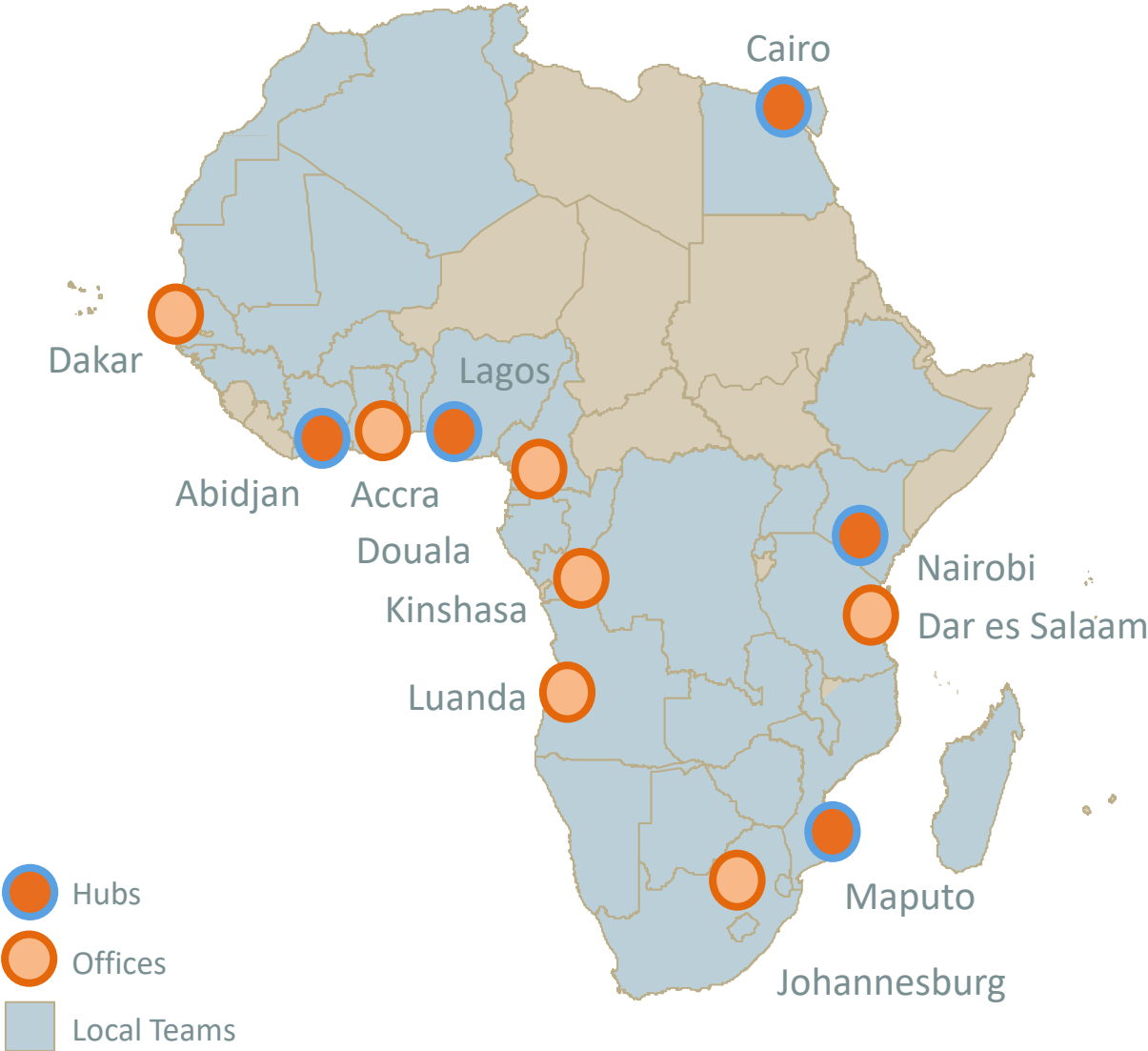


Robust experience

1,500+ research projects since 2012

More than 10,000 surveys respondents on a daily basis across the continent

A unique African footprint



Operations in 30+ African countries
(Field and/or online panels)



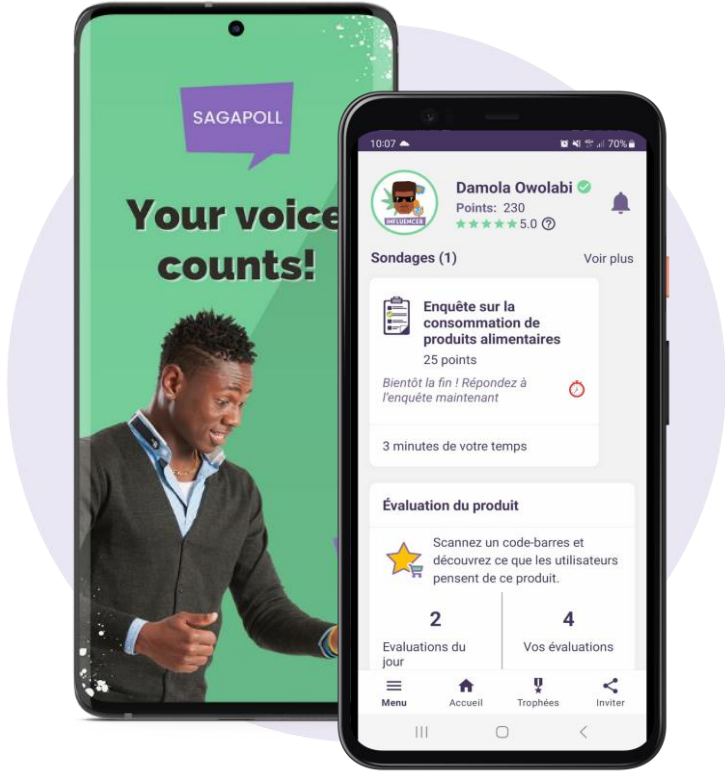
12 offices in Africa
(with local research experts)



5 regional hubs
(Nairobi, Cairo, Abidjan, Lagos, Maputo)



Support offices in Europe and Asia
(Barcelona, Hong Kong)



5,000,000

interviews per year, making

SagaPoll

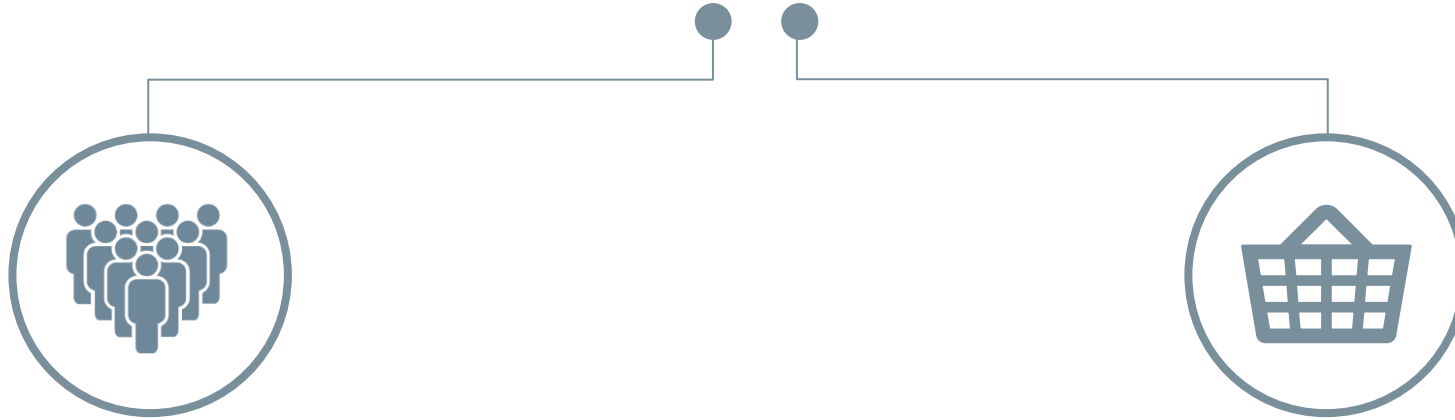
the largest online community
collecting high quality data in Africa



An enriching experience because this platform provides an incredible amount of knowledge.

Soukou A.

What is our data about?



Understanding consumers

What do consumers know, buy and use?

What do they prefer?

How do consumers perceive my brand?

How attractive is my new product/concept?

Understanding distribution channels

How are distribution channels organized?

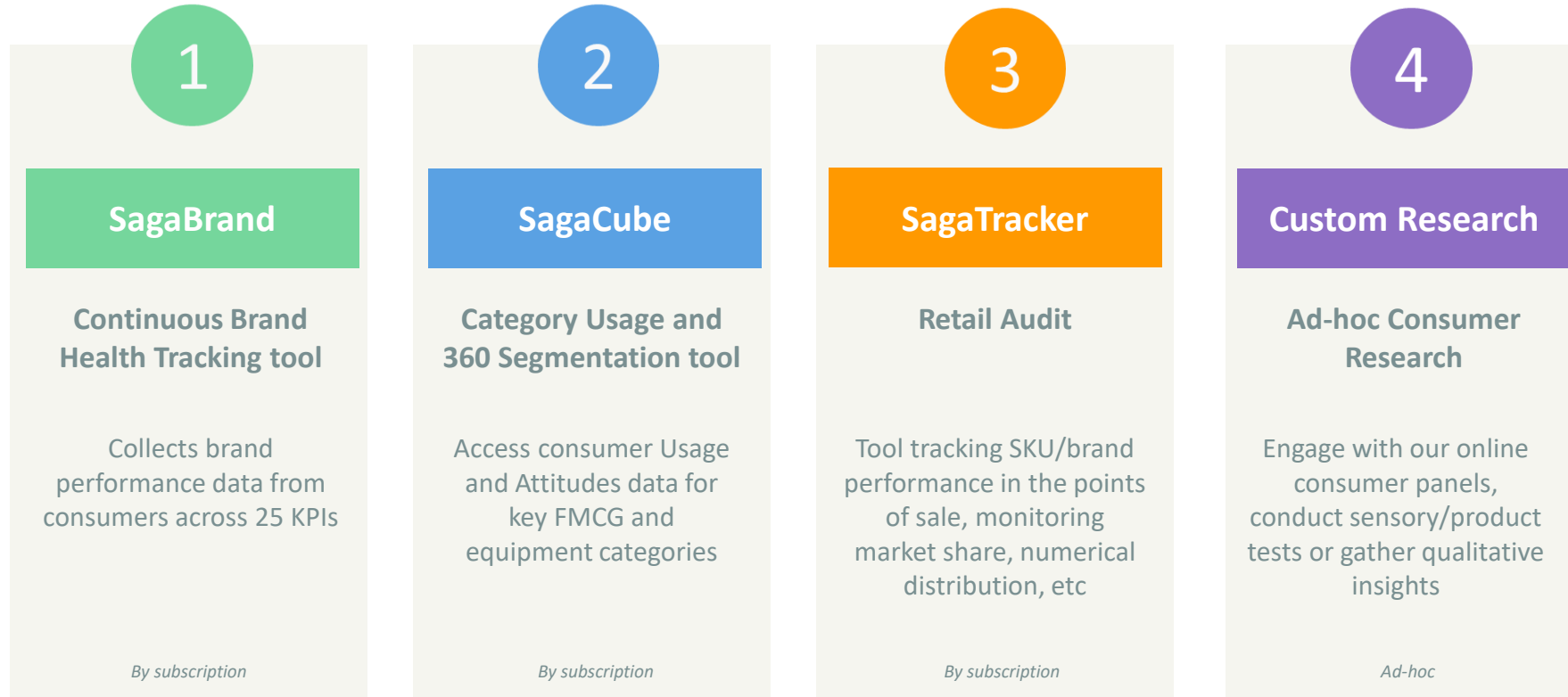
Where are the outlets selling my category?

How do brands perform across the channels?

How is modern trade evolving?

Sagaci Research: the data and analytics firm in Africa

Annual subscription to three online tools, which can be enriched by custom projects



Over 500 great businesses already trust us to conduct their market research in Africa



Agenda



- 1 Introduction to Sagaci Research
- 2 Benefits of brand tracking
- 3 Case study 1: Assessing the impact of marketing campaigns
- 4 Case study 2: Compare brand performance against the competition
- 5 Case study 3: Assessing the impact of external market shocks
- 6 Case study 4: Compare brand performance between countries
- 7 Case study 5: Be aware of up-and-coming brands
- 8 Case study 6: Diagnose brand strengths and weaknesses
- 9 Solutions by Sagaci Research
- 10 Q&A

(Some!) benefits of brand tracking

- Assess the impact of marketing activities (campaigns / product launches, etc)
- Diagnose brand strengths and weaknesses
- Compare brand performance against the competition
- Compare brand performance between countries
- Identify up-and-coming brands
- Assess the impact of external market shocks



What should my marketing priorities be for the upcoming months (or years)?

What is the impact of my marketing activities on my key brand KPIs?

How are my competitors performing?

Is my digital campaign with a local influencer improving visibility for younger target groups?

To what extent was my brand impacted as a result of a particular market event?

How well known is my brand?



Agenda



- 1 Introduction to Sagaci Research
- 2 Benefits of brand tracking
- 3 Case study 1: Assessing the impact of marketing campaigns
- 4 Case study 2: Compare brand performance against the competition
- 5 Case study 3: Assessing the impact of external market shocks
- 6 Case study 4: Compare brand performance between countries
- 7 Case study 5: Be aware of up-and-coming brands
- 8 Case study 6: Diagnose brand strengths and weaknesses
- 9 Solutions by Sagaci Research
- 10 Q&A

Case study 1: Supermarkets Kenya

Assessing the impact of marketing campaigns



Background

- The Kenyan supermarket sector is highly competitive, especially following the collapse of local giant Nakumatt
- New stores have been opening across the country and the chains must take action to stay relevant to consumers
- Quickmart celebrated its 15th anniversary with a month-long promotional period throughout September 2021



By how much did Quickmart's anniversary campaign increase brand echo, consideration and bring customers into stores?



Did competitor's actions in the same period dampen the efforts of Quickmart's campaign?

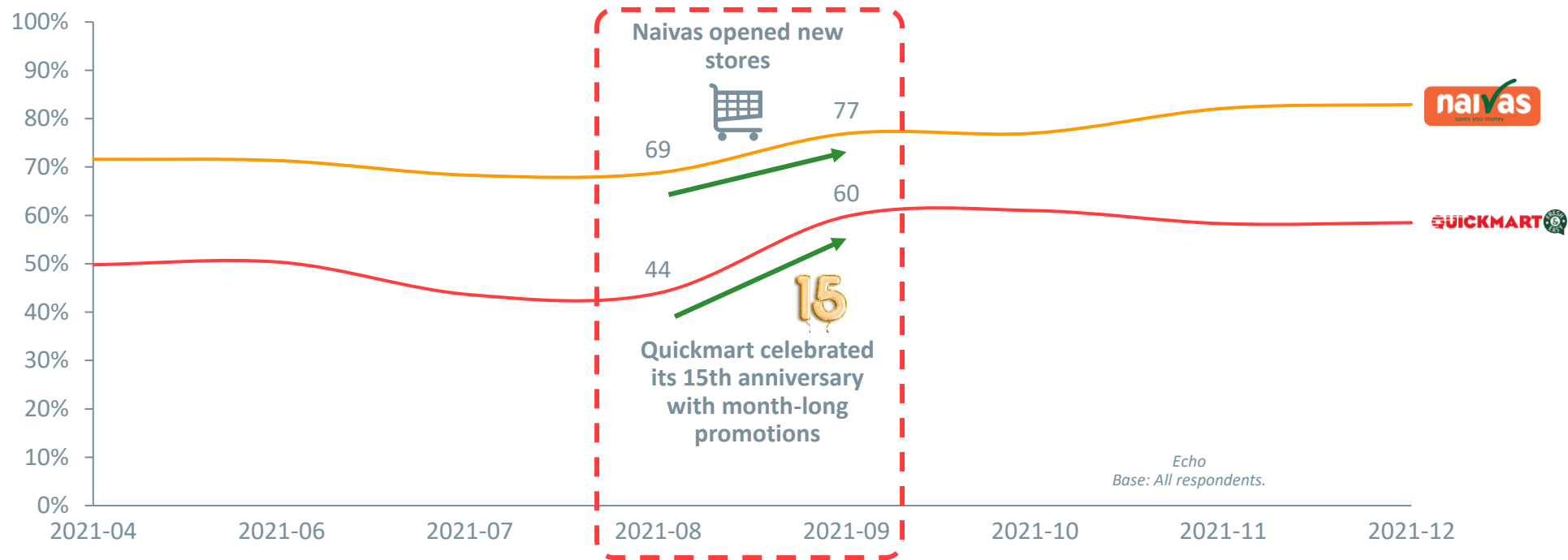


Source: Instagram @quickmartkenya 24.10.21



Echo (buzz) significantly increased during Quickmart's promotional period

Case study 1: Supermarkets Kenya | Assessing the impact of marketing campaigns

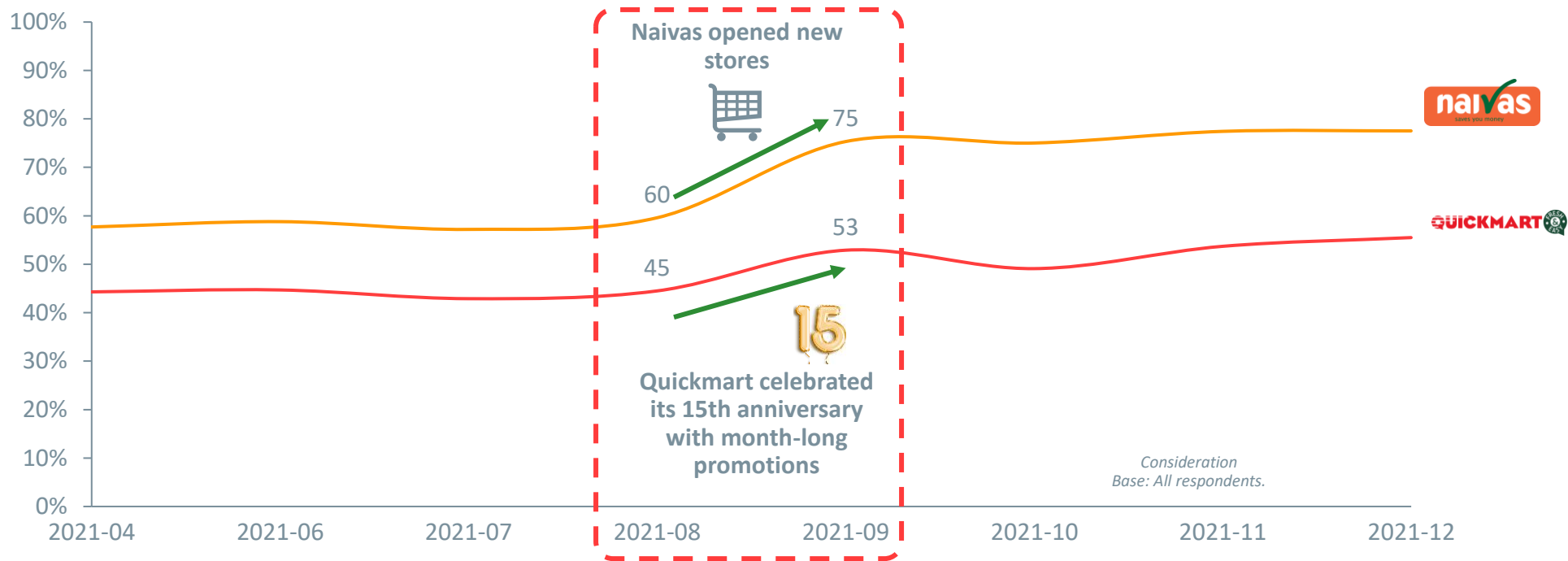


- Both Naivas and Quickmart experienced increased echo between August and September 2021
- Naivas echo increased 12%, HOWEVER, Quickmart increased more significantly, by 36% – the campaign was effective in increasing echo during the campaign period
- The increased level of echo was also maintained for the remainder of the year

Consideration for Quickmart increased during the promotion period, but to a lesser extent than for Naivas who opened new stores



Case study 1: Supermarkets Kenya | Assessing the impact of marketing campaigns

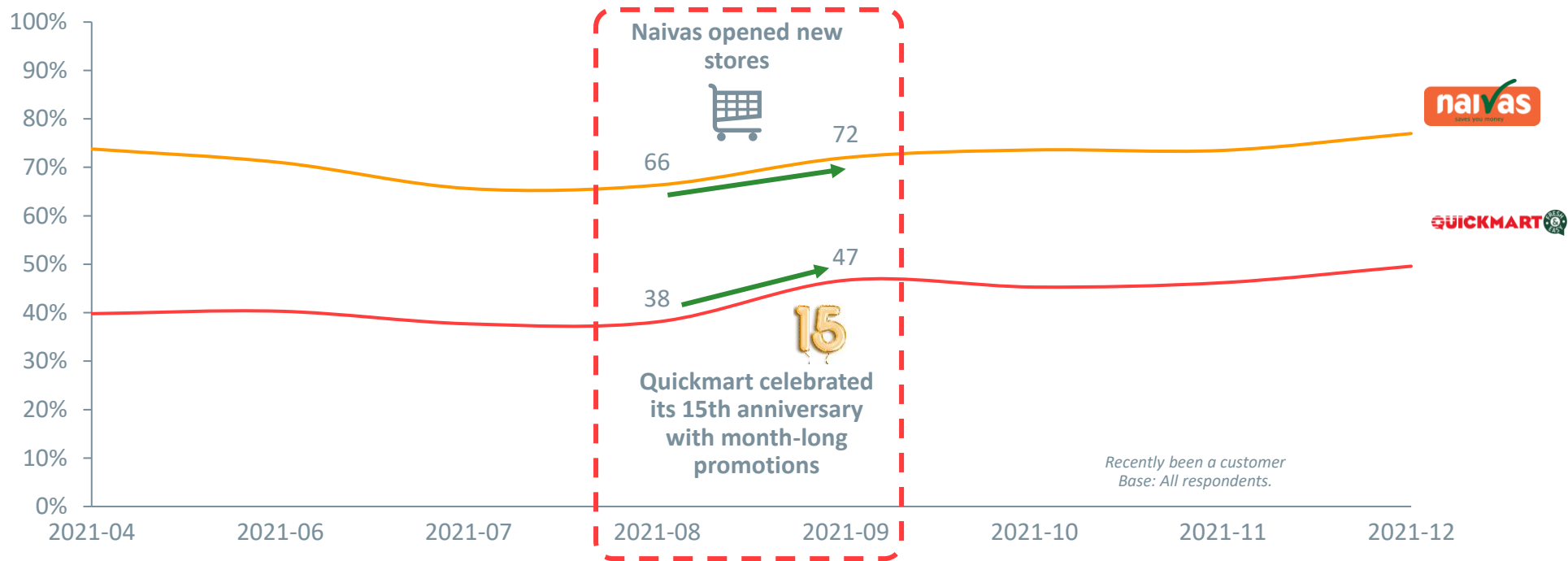


- Both Naivas and Quickmart also experienced increased consideration between August and September 2021
- Quickmart consideration increased by 18%, HOWEVER, Naivas increased more significantly by 25% – the campaign was somewhat effective in increasing consideration for the brand, however, opening new stores proved to be a more effective technique for raising (and maintaining) consideration of Naivas

Recent customers increased for Quickmart at a greater rate than that experienced by Naivas. No significant changes long term



Case study 1: Supermarkets Kenya | Assessing the impact of marketing campaigns



- Quickmart experienced some increased recent purchases between August and September 2021 – increased by 24% but this rate of increase did not continue
- Despite the new store openings, Naivas increased only slightly by 9%
- We can therefore conclude that it is much harder to influence actual purchases than it is echo or consideration, regardless of whether the strategy is to open new stores or run a promotional period

Agenda



- 1 Introduction to Sagaci Research
- 2 Benefits of brand tracking
- 3 Case study 1: Assessing the impact of marketing campaigns
- 4 Case study 2: Compare brand performance against the competition
- 5 Case study 3: Assessing the impact of external market shocks
- 6 Case study 4: Compare brand performance between countries
- 7 Case study 5: Be aware of up-and-coming brands
- 8 Case study 6: Diagnose brand strengths and weaknesses
- 9 Solutions by Sagaci Research
- 10 Q&A

Case study 2: Whisky in Côte d'Ivoire

Compare brand performance against the competition



Background

- The Ivorian whisky market is highly competitive with much variety between value / premium / super premium segments
- Affordability is a key strategy for many, whereas others focus on offering quality and maintaining a luxury brand image



Where does each brand rank compared to the performance of others? How does this compare for each aspect of the brand's performance – awareness, consideration, purchase rates, satisfaction etc? Where do opportunities exist to grow the brand to achieve / maintain a strong ranking in the market?



Are there certain demographics driving the overall performance of each brand? Do certain demographics over/under perform, and is this a trend within the whisky category? Which demographics should each brand focus their marketing efforts on to keep up with the performance of competitors amongst this group?

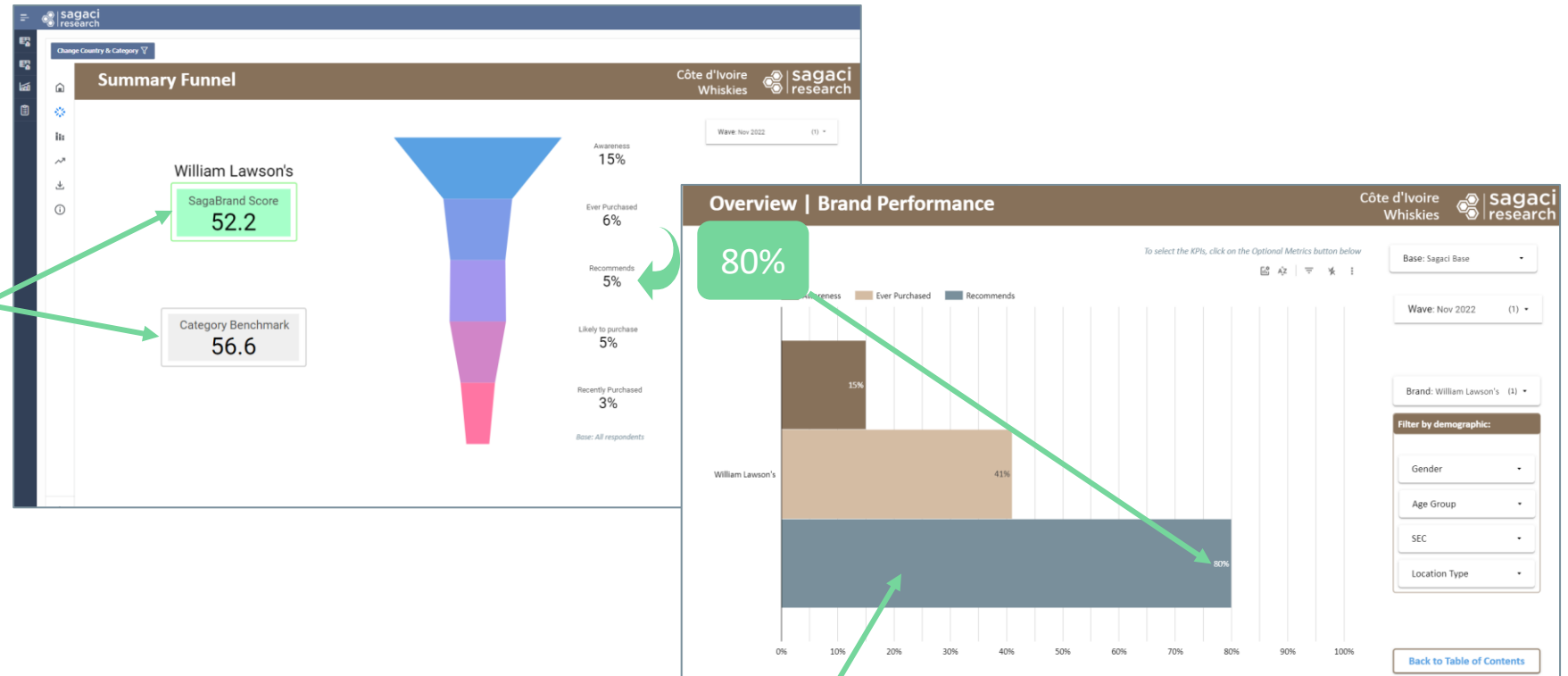
William Lawson's performs below Whisky category average, but has a strong recommendation rate



Case study 2: Whisky in Côte d'Ivoire | Compare brand performance against the competition



William Lawson's performs below Whisky category average at selected point in time

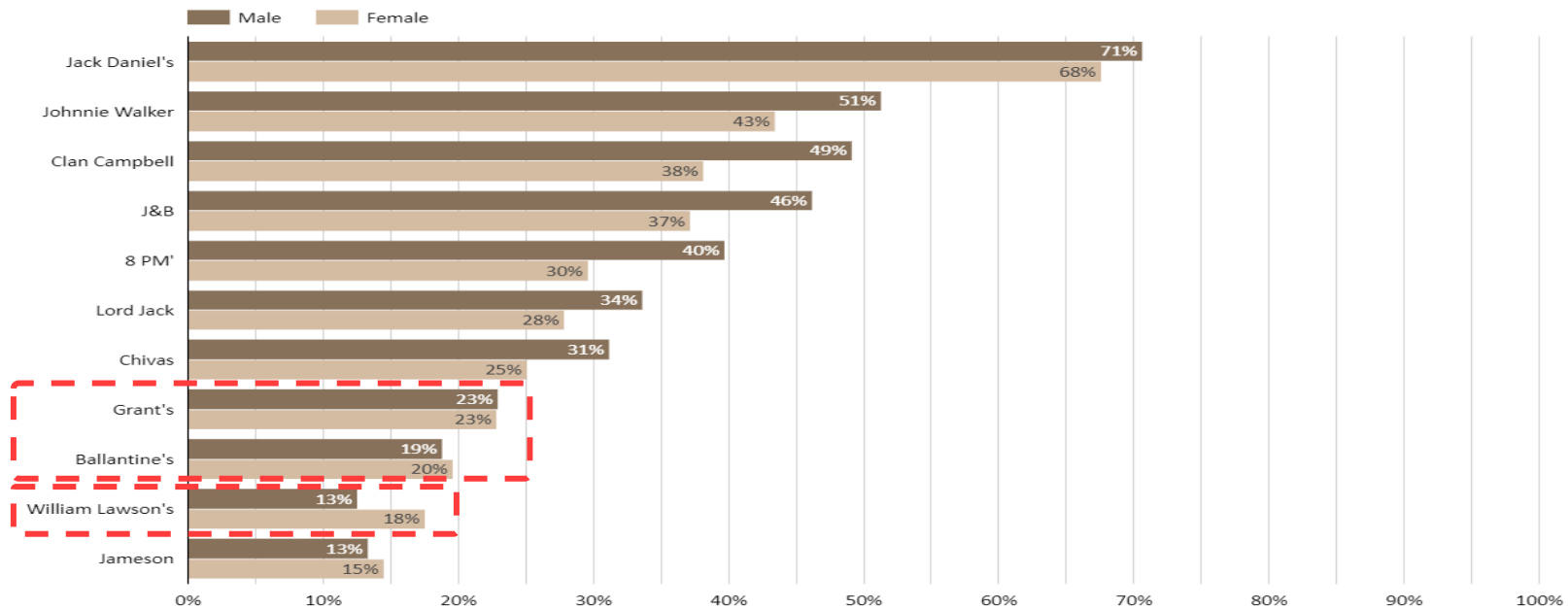


The dashboard summary funnel quickly shows that William Lawson's low SagaBrand score is likely driven by low awareness (15%), and purchases (6%), but increased by a strong customer recommendation rate of 80%



Brand awareness can differ by gender for each brand

Case study 2: Whisky in Côte d'Ivoire | Compare brand performance against the competition



- Across the market, males tend to be more brand aware than females
- However, for lesser known brand William Lawson, it is actually females who are more aware (18%) than males (13%) – the brand has, therefore, either had a successful female awareness strategy OR has the potential to narrow the gender awareness gap by improving male awareness levels
- On the other hand, brands like Ballantine's and Grant's tend to be known equally by males and females

Visualisation by income group allows you to monitor positioning and core target groups



Case study 2: Whisky in Côte d'Ivoire | Compare brand performance against the competition

brand	income_group / Consideration				
	1 - Affluent (Above 1,000 USD)	2 - Middle class (500 to 1,000 USD)	3 - Aspiring Middle Class (250 to 500 USD)	4 - Lower Middle Class (100 to 250 USD)	5 - Bottom of the Pyramid (Less than 100 USD)
William Laws...	42.1%	44.4%	48.1%	19.2%	56.1%
Lord Jack	31.6%	30.4%	50.8%	30.3%	52.2%
Johnnie Walker	63.9%	52.8%	54.2%	49.5%	60.0%
Jameson	61.1%	42.9%	44.0%	33.3%	72.2%
Jack Daniel's	70.8%	72.5%	65.0%	64.0%	63.5%
J&B	64.7%	61.3%	45.0%	43.8%	47.8%
Grant's	33.3%	42.9%	45.3%	32.0%	43.2%
Clan Campbell	51.5%	42.4%	42.9%	52.2%	51.3%



- Similar consideration rates from the middle and aspiring middle classes, for both William Lawson (ranked 10/11 for overall brand awareness) and Jameson (ranked 11/11 for overall brand awareness)
- Interestingly though, the lower middle class and bottom of the pyramid respondents were much more likely to consider purchasing Jameson than they were William Lawson's

Agenda



- 1 Introduction to Sagaci Research
- 2 Benefits of brand tracking
- 3 Case study 1: Assessing the impact of marketing campaigns
- 4 Case study 2: Compare brand performance against the competition
- 5 Case study 3: Assessing the impact of external market shocks
- 6 Case study 4: Compare brand performance between countries
- 7 Case study 5: Be aware of up-and-coming brands
- 8 Case study 6: Diagnose brand strengths and weaknesses
- 9 Solutions by Sagaci Research
- 10 Q&A

Case study 3: Foodservice in Kenya

Assessing the impact of external market shocks



Background

- KFC suffered a shortage of fries in early 2022 as a result of supply chain issues from their potato suppliers in Egypt. As a result, KFC removed the popular side dish from their menu
- Certain competitors sourced their potatoes locally, which allowed them to capitalise on both KFC's commercial woes and the public backlash
- Burger King was quick to release adverts taunting their competitor about their lack of fries



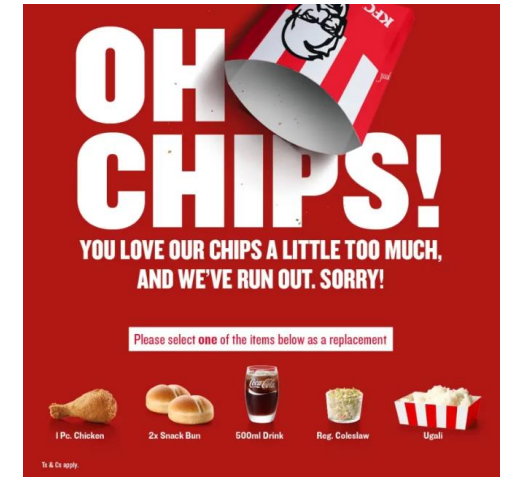
Did the removal of fries from KFC's menu reduce purchase consideration or customer recommendation?



Did Burger King's witty social media campaign help to attract attention and customers?



Which other brands were impacted by the potato shortage?



Source: Twitter @KFCinKenya 3.1.22

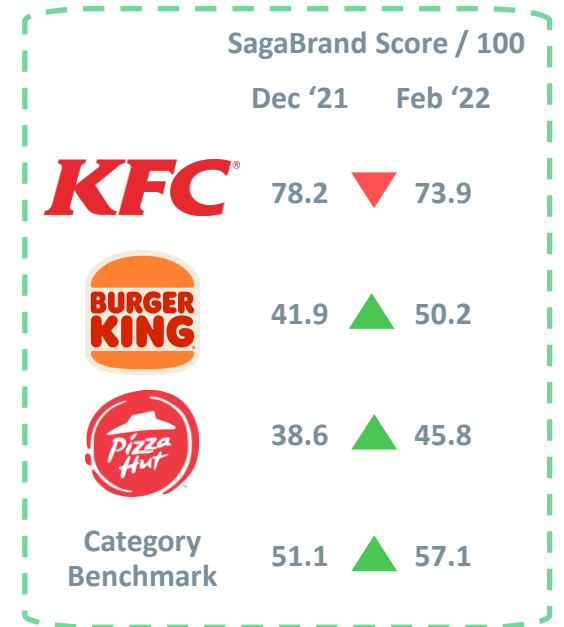
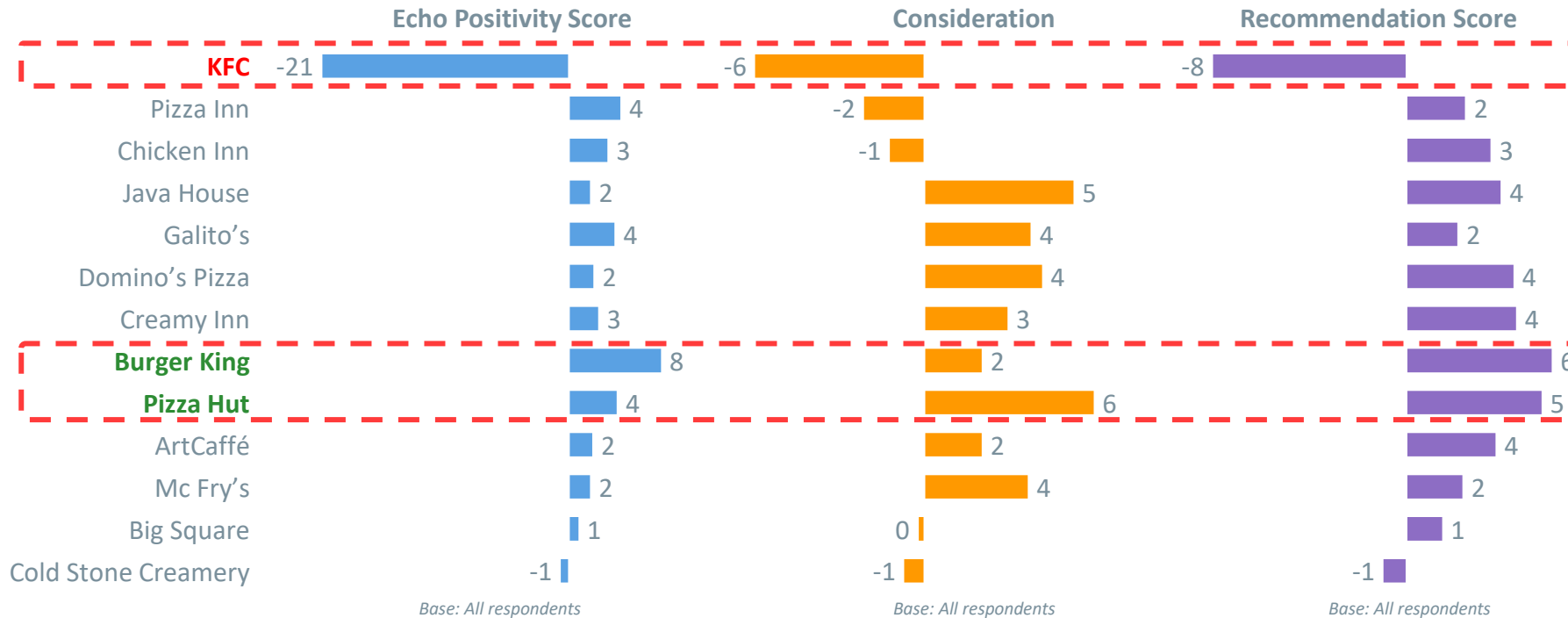


Source: Instagram @burgerking.ke 4.1.22

Percentage point score change for the period before and during the fries shortage (December 2021 & February 2022)



Case study 3: Foodservice in Kenya | Assessing the impact of external market shocks

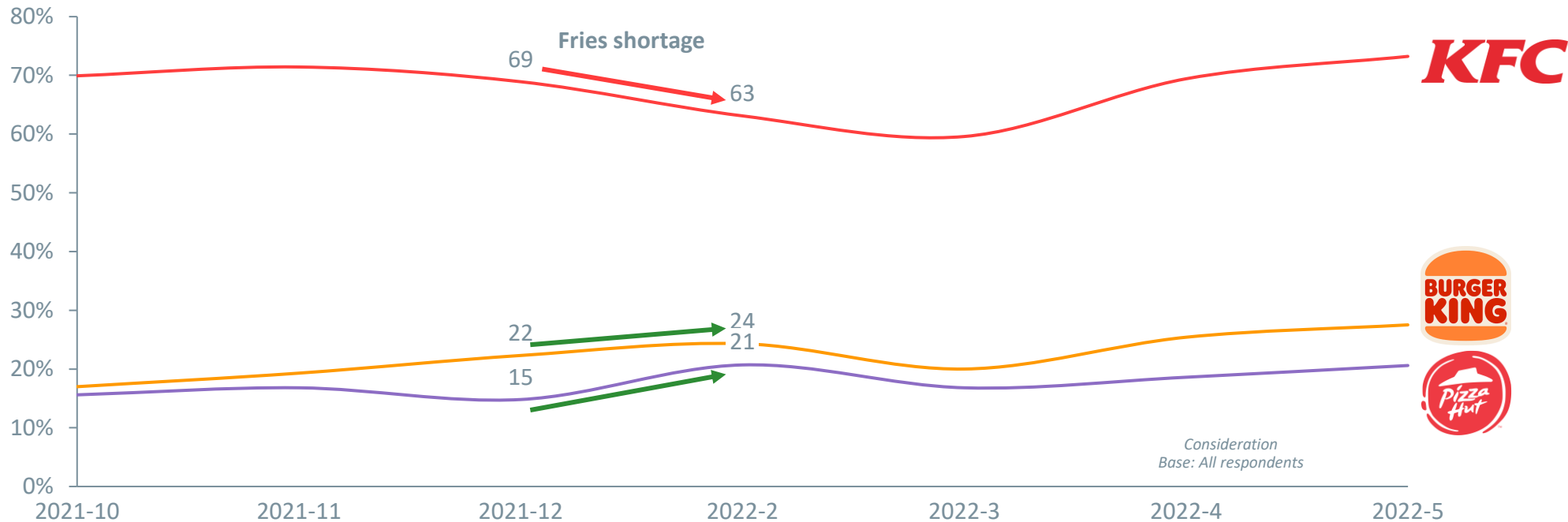


- Amongst other KPIs, Echo Positivity Score, Consideration and Recommendation Score all significantly dropped for KFC following the fries shortage. Other than Cold Stone Creamery, it was the only brand with adverse movement during this period
- As KFC struggled, these KPIs improved for Burger King thanks to their marketing efforts. However, although consideration increased, the extent was lesser than for competitors such as Pizza Hut

Monthly tracking shows trends over time – consideration for KFC decreased during the fries shortage but recovered in the following months



Case study 3: Foodservice in Kenya | Assessing the impact of external market shocks



- In terms of purchase consideration, whilst KFC did momentarily suffer as a result of the fries shortage, they were able to make a full recovery by May 2022, and remain in the lead as #1 considered foodservice brand in Kenya
- Burger King’s campaign caught attention and somewhat increased overall purchase consideration. This followed a market wide trend in March, dropping slightly, but has since begun regaining momentum

Agenda



- 1 Introduction to Sagaci Research
- 2 Benefits of brand tracking
- 3 Case study 1: Assessing the impact of marketing campaigns
- 4 Case study 2: Compare brand performance against the competition
- 5 Case study 3: Assessing the impact of external market shocks
- 6 Case study 4: Compare brand performance between countries
- 7 Case study 5: Be aware of up-and-coming brands
- 8 Case study 6: Diagnose brand strengths and weaknesses
- 9 Solutions by Sagaci Research
- 10 Q&A

Case study 4.1: Banking across Africa

Compare brand performance between countries



Background

- A competitive pan-African landscape for banks competing to perform and capture customers across the continent
- Although headquartered in the UK, British multinational bank, Standard Chartered, have a strong focus on its footprint in Africa & Middle East region, and have invested heavily in recent years, particularly in relation to its digital capabilities
- In 2022, they announced future plans for a full exit of operations from Angola, Cameroon, Gambia, Sierra Leone and Zimbabwe, as well as changes in Tanzania and Cote d'Ivoire



In which of their African countries does Standard Chartered perform best amongst consumer opinions, and in which is there room to improve?



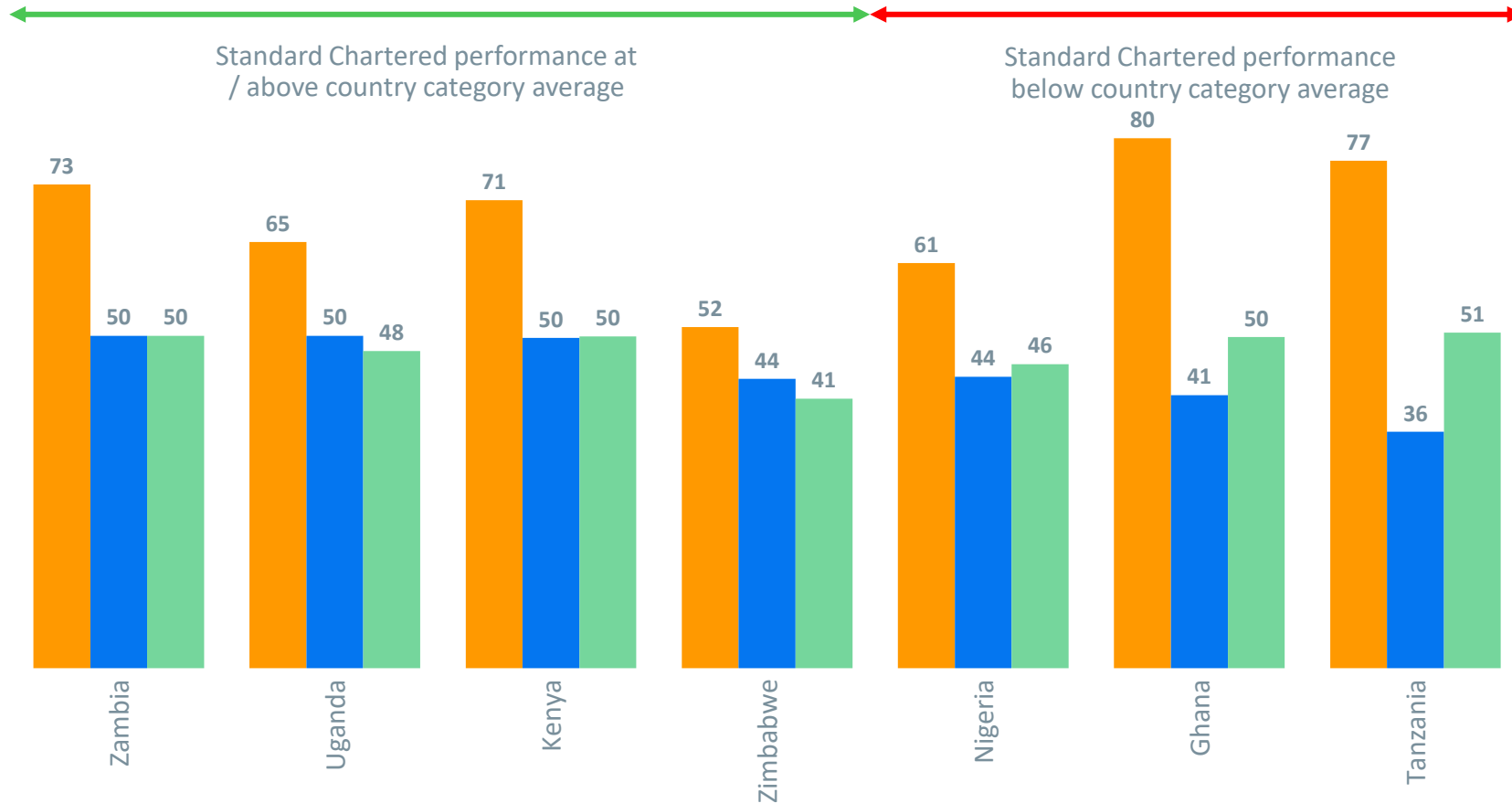
What can the bank learn from their performance in strong countries, to apply to weaker countries?

Standard Chartered's strongest performance is in Zambia, Uganda and Kenya – scoring around the category average. Weaker performance in Ghana and Tanzania



SagaBrand Score / 100

April / Q1 2023 Results



- Standard Chartered has a fairly consistent performance across the 7 highlighted markets
- The brand performs around the category average in 5/7 of the highlighted markets, and below average in 2, indicating significant opportunities to narrow the gap with the best performer
- Lower performance in Tanzania reflects the structural changes announced in 2022

Case study 4.2: Online streaming services across Africa

Compare brand performance between countries

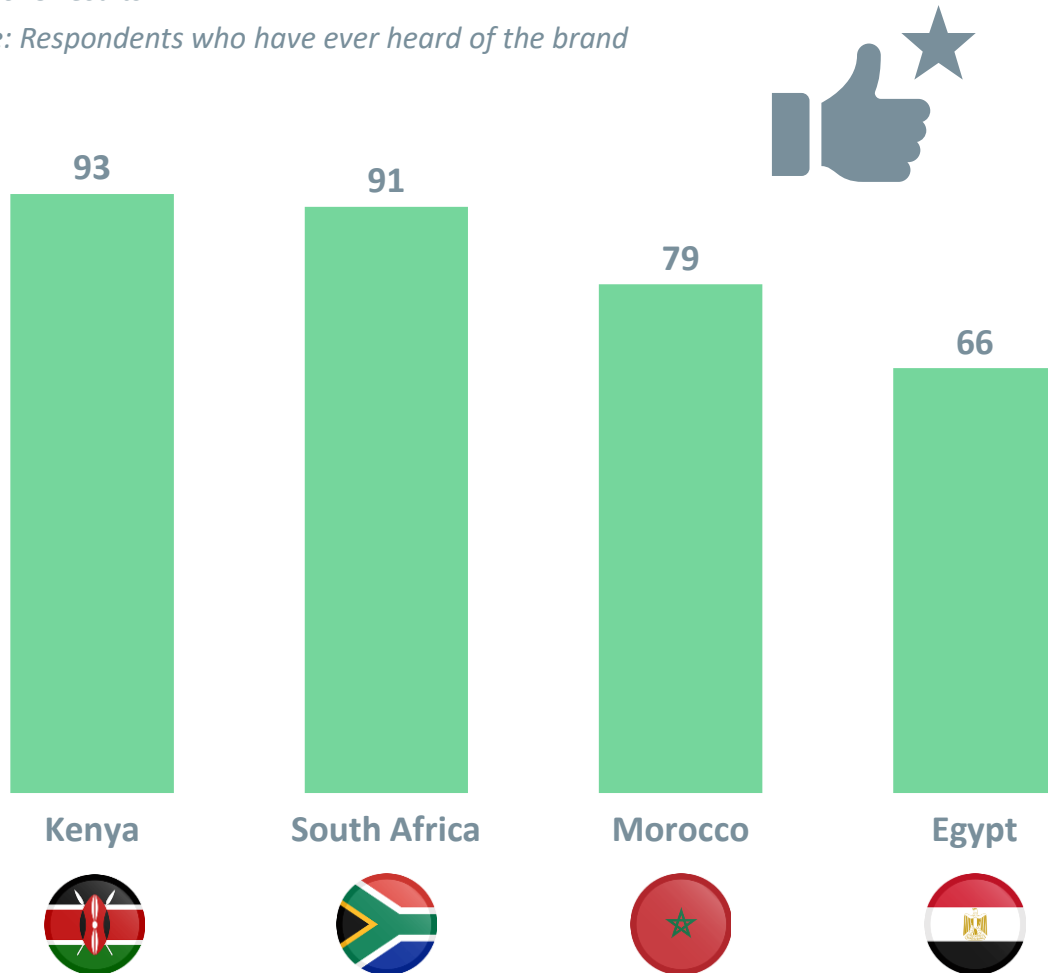


NETFLIX

Good Quality: Which of the following brands represents GOOD quality? (%)

H1 2023 results

Base: Respondents who have ever heard of the brand



Background

- To be a totally global brand, Netflix need to ‘crack’ all markets



Do people have the same perceptions about the brand quality across all African countries?



- Quality perceptions may reflect cultural and language preferences
- Re-occurring cultural controversy in Egypt may be contributing to lower quality scores
- E.g. Netflix’s first original film in Arabic, “Perfect Strangers”, which launched in 2022, was described in a lawsuit as a “plot to disrupt Arab society”
- More recently, Egyptians have launched social media campaigns over the depiction of Cleopatra in the Netflix documentary “Queen Cleopatra”

Agenda



- 1 Introduction to Sagaci Research
- 2 Benefits of brand tracking
- 3 Case study 1: Assessing the impact of marketing campaigns
- 4 Case study 2: Compare brand performance against the competition
- 5 Case study 3: Assessing the impact of external market shocks
- 6 Case study 4: Compare brand performance between countries
- 7 Case study 5: Be aware of up-and-coming brands
- 8 Case study 6: Diagnose brand strengths and weaknesses
- 9 Solutions by Sagaci Research
- 10 Q&A

Case study 5.1: Carbonated soft drinks in Cameroon

Be aware of up-and-coming brands



Background

- As in Angola, Burkina Faso, Egypt, Côte d'Ivoire and Senegal months earlier, strategic decisions by Castel (through Les Brasseries du Cameroun / SABC) and the Coca-Cola Company culminated in a production halt in 2022. Coca-Cola sales in Cameroon literally crashed in a matter of a few months
- Meanwhile, in a declared gesture to promote affordability and African culture, competitors steadily started filling the shoes left by Coca-Cola: Source du Pays with American Cola under license from Monarch Beverages and SABC with World Cola launched only in March 2022
- Soon, Coca-Cola found an agreement and the newly created Coca-Cola Gracedom Bottling Company resumed production of products (including Fanta and Sprite) early 2023.



How have these events, including the entry of the new brand to the market, affected consumers' brand preferences?



Will Coca-Cola maintain their brand image and 5th place preference (2022) despite the drop in market share?



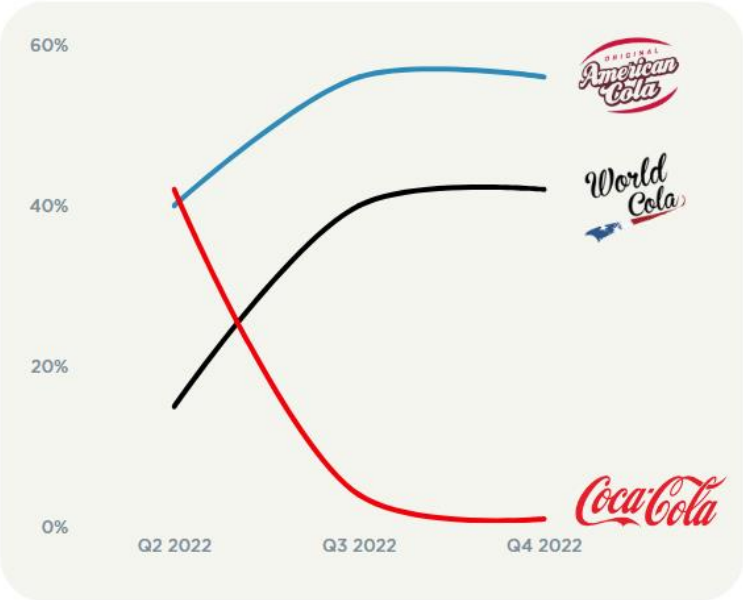
How long will it take World Cola to catch up to the more established players?

SagaTracker Retail Audit 2022 found a sharp decline in volume sales, availability & share of stock for Coca-Cola, but sudden growth for American Cola and World Cola

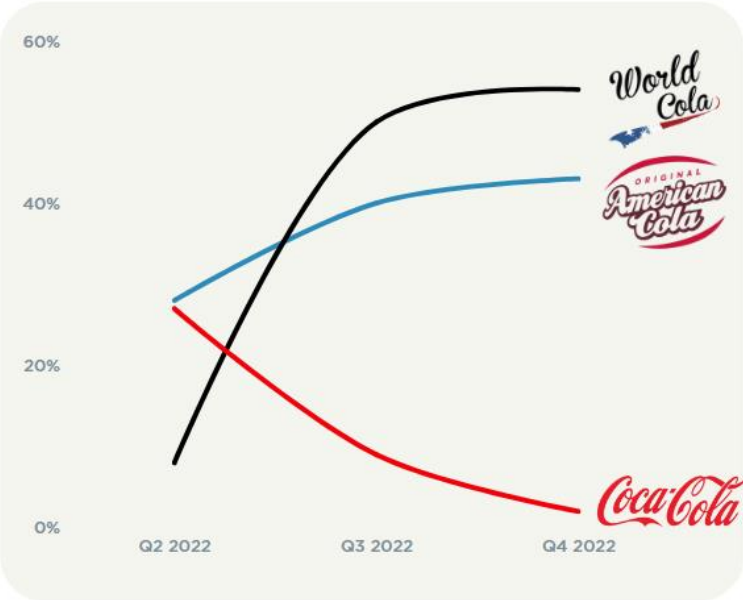


Case study 5.1: Carbonated soft drinks in Cameroon | Be aware of up-and-coming brands

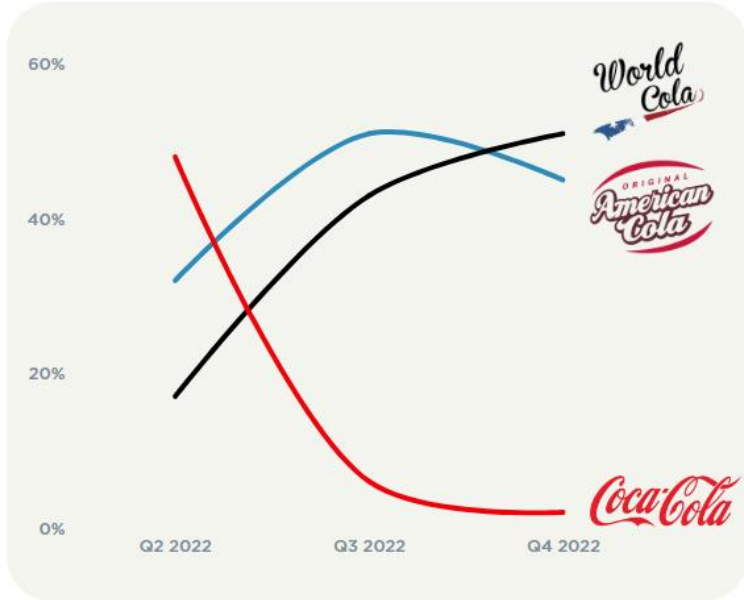
Volume Sales



Availability



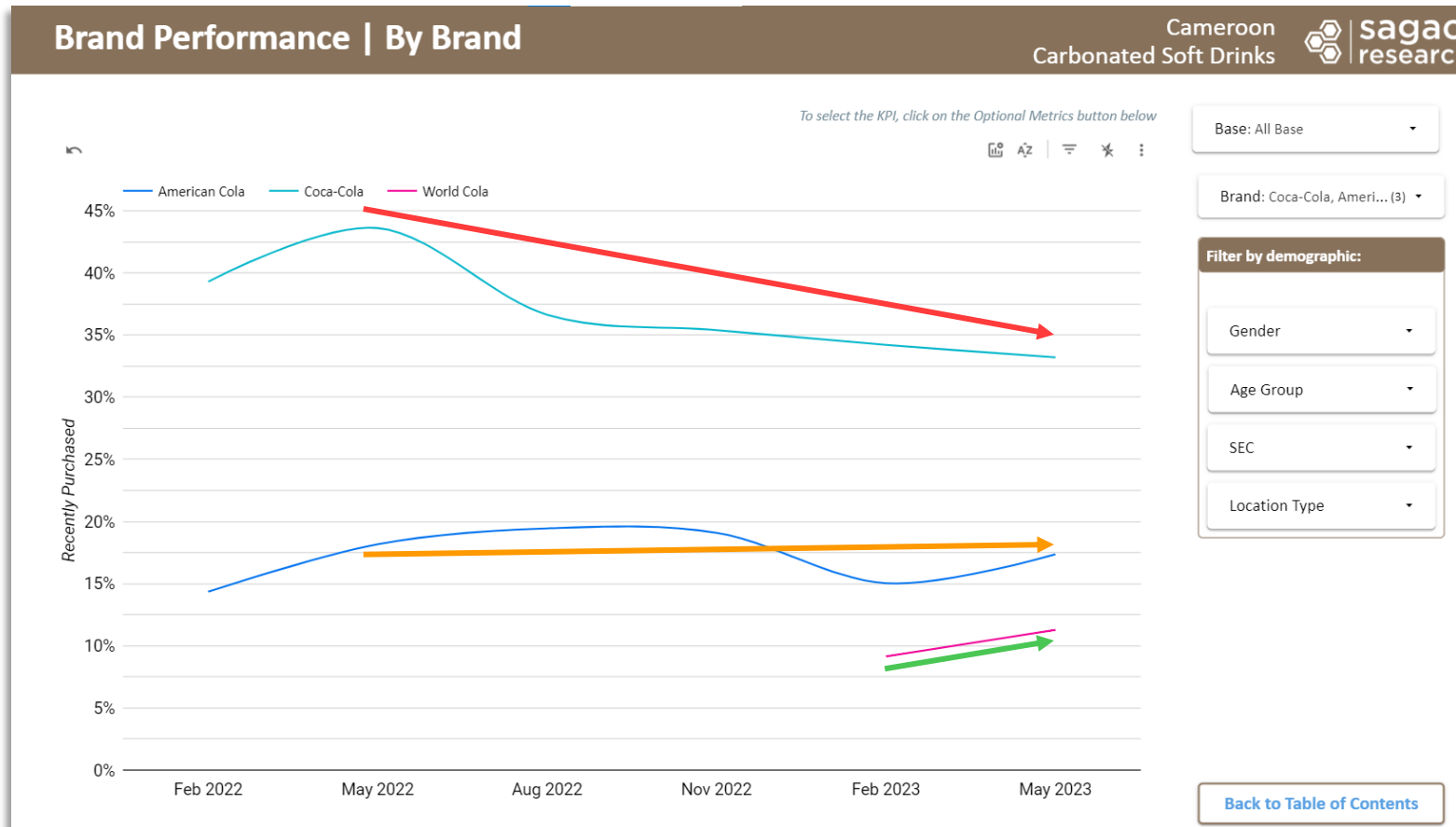
Share of stock



In line with trade findings, recent purchases of Coca-Cola have been declining over time, whilst American Cola and World Cola have seen growth



Case study 5.1: Carbonated soft drinks in Cameroon | Be aware of up-and-coming brands



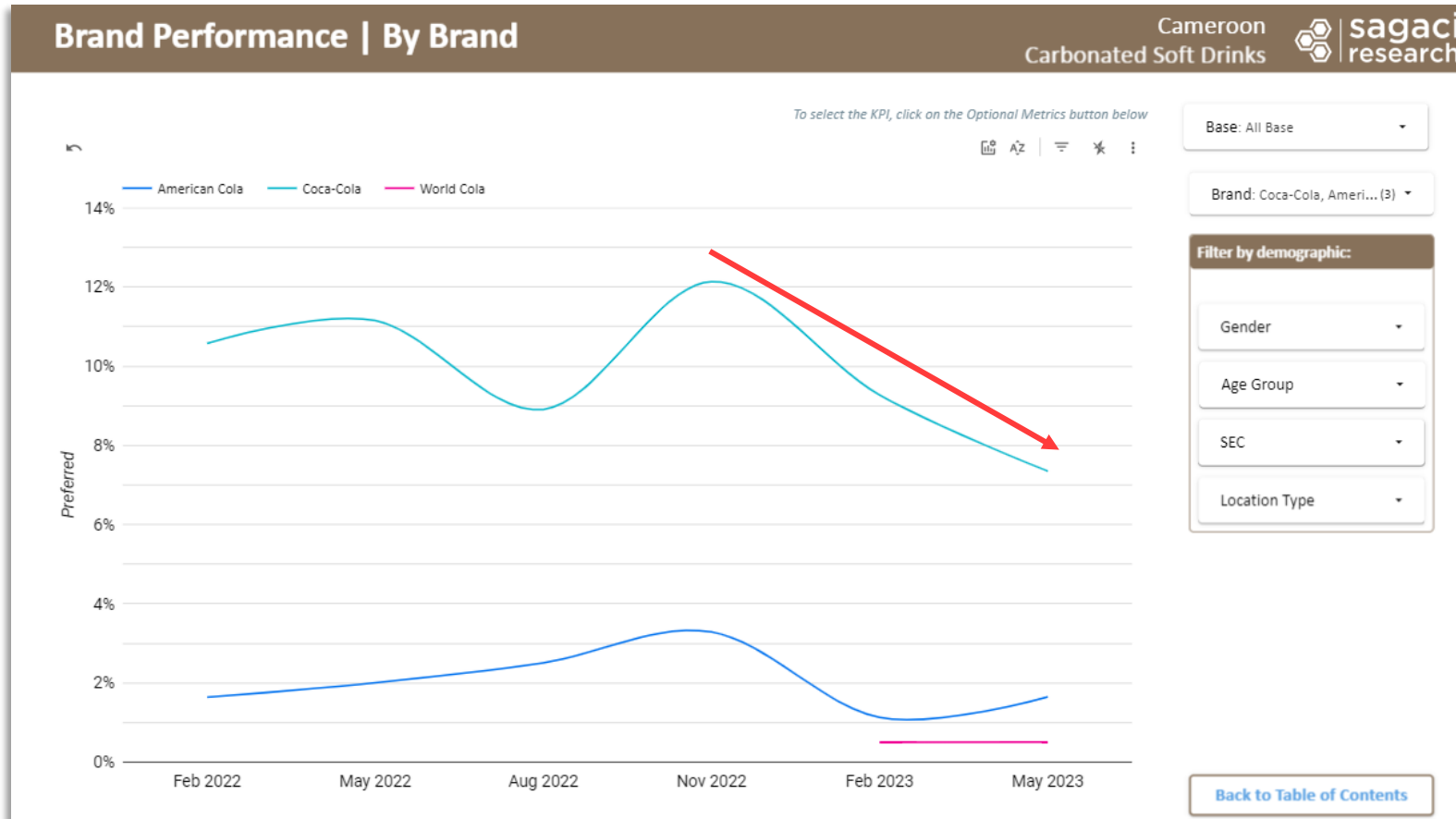
“Nature abhors a vacuum” – every space needs to be filled with something, and when Coca-Cola started dropping off the shelves, alternative brands found the gap. As Coca-Cola experienced a gradual decline in recent purchases, American Cola’s recent purchases remained stable.

World Cola – new to the Cameroonian market – also picked up reported purchases

Likewise, preference has noticeably declined for Coca-Cola. Some uplift for American Cola. World Cola preference has a way to go



Case study 5.1: Carbonated soft drinks in Cameroon | Be aware of up-and-coming brands



Likewise, consume preference of Coca-Cola also took a downward spiral, whilst American Cola saw some improvements throughout 2022. Preference for the newly-introduced World Cola brand has remained low throughout the first half of 2023, but should be monitored closely as the brand gains momentum and notoriety

Agenda



- 1 Introduction to Sagaci Research
- 2 Benefits of brand tracking
- 3 Case study 1: Assessing the impact of marketing campaigns
- 4 Case study 2: Compare brand performance against the competition
- 5 Case study 3: Assessing the impact of external market shocks
- 6 Case study 4: Compare brand performance between countries
- 7 Case study 5: Be aware of up-and-coming brands
- 8 Case study 6: Diagnose brand strengths and weaknesses
- 9 Solutions by Sagaci Research
- 10 Q&A

Case study 6: Yoghurt in Senegal

Diagnose brand strengths and weaknesses



Background

- As in much of Africa, demand for nutrient-rich beverages such as drinking yoghurt is driven by rising consumer health consciousness, improving consumer living standards...
- Quite a few dairy companies are working towards harnessing the growth of the dairy category in Senegal, some for example through innovation with the launch of new exotic flavours. We find a mix of players, some local (Les Mamelles Jaboot, Dolima – produced by Laiterie de Berger) but also international companies with local partnerships: Elle & Vire (owned by the Savencia group), Danone, Arla Foods, Lactalis, etc.



What are the strengths of the Crémor brand in Senegal? How do those compare against other yoghurt brands?



In which areas does Crémor have opportunity to improve?



Has this brand diagnosis been consistent over time, or have there been any recent changes?

Crémor ranks within the top 5 overall, but has a significant gap to close with leader, Dolima



Case study 6: Yoghurt in Senegal | Diagnose brand strengths and weaknesses

↑↓ Increase / Decrease at significance level >90%
Top 5

Base: Sagaci Base

KPI	Best Performer	crémor	Rank / 15	Category Average
SagaBrand Score	Dolima	56%	4	48%
Awareness	Dolima	39%	6	35%
Echo	Dolima	36% ↑	6	34%
Reach	Dolima	30%		
Ever Purchased	Dolima	73%		
Recently Purchased	Dolima	48%		
Preferred Brand	Dolima	54%	4	17%
Consideration	Dolima	75%	3	48%
Likely to Purchase	Dolima	89% ↑	2	72%
Echo Type Score		86%	4	68%
Quality Score		83%	3	54%
Satisfaction Score		75%	3	52%
Recommendation Score	Dolima	80%	3	57%

Crémor within the top 5 - driven by a strong performance for customer satisfaction, recommendation, likeliness to purchase... but weaker scores for reach and echo

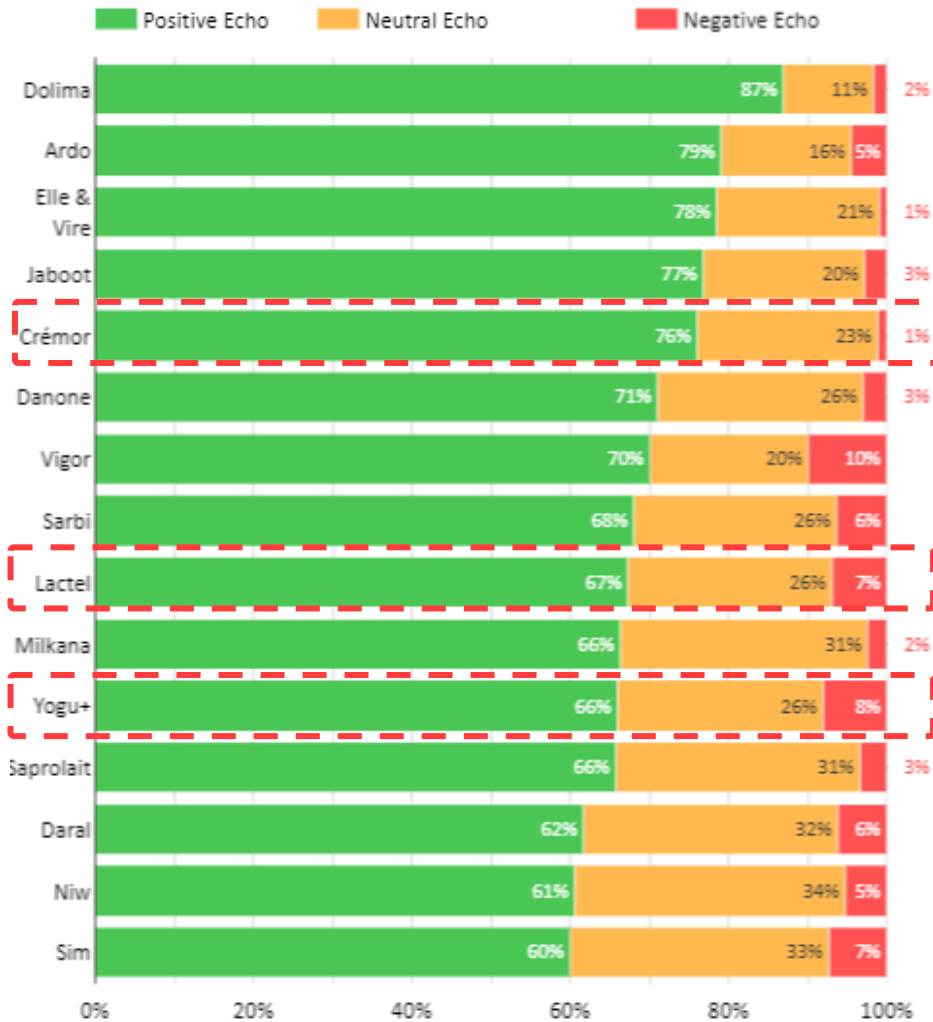
Even though buzz around the Crémor brand is low, significant increase in noise between Q1 and Q2

Dolima has maintained a very strong #1 position right across the board. Despite a decrease in 'ever purchased' rate, it still scored 93%

People have mainly been hearing positive things about yoghurt brands, although there was a little negativity heard for Lactel and Yogu+



Case study 6: Yoghurt in Senegal | Diagnose brand strengths and weaknesses

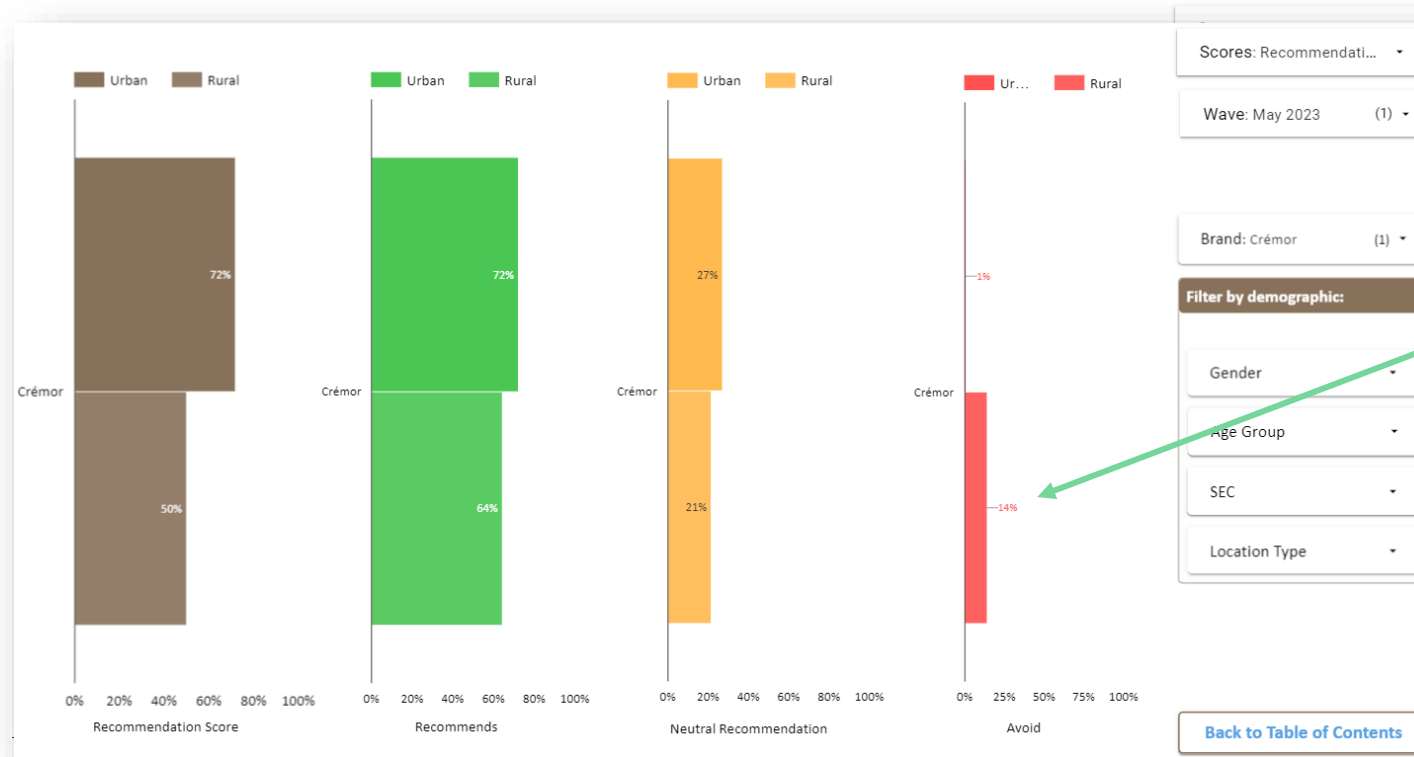


Echo around the Crémor brand is largely positive. This is the case for all brands on the market, however, Crémor has the advantage of minimal negative echo (1%), whereas brands such as Lactel and Yogu+ experienced some adverse noise

Opportunities for Crémor to improve recommendation rate amongst rural customers



Case study 6: Yoghurt in Senegal | Diagnose brand strengths and weaknesses



Urban customers tend to recommend Crémor more than rural customers, amongst whom there was some avoidance (14%)



- Overall, Crémor ranked #3 for recommendation score (70%), behind Dolima and Elle & Vire. This was largely driven by urban respondents, amongst whom there was zero avoidance
- In contrast, there is an opportunity to improve perceptions amongst rural respondents, with the goal to reduce avoidance

Agenda



- 1 Introduction to Sagaci Research
- 2 Benefits of brand tracking
- 3 Case study 1: Assessing the impact of marketing campaigns
- 4 Case study 2: Compare brand performance against the competition
- 5 Case study 3: Assessing the impact of external market shocks
- 6 Case study 4: Compare brand performance between countries
- 7 Case study 5: Be aware of up-and-coming brands
- 8 Case study 6: Diagnose brand strengths and weaknesses
- 9 Solutions by Sagaci Research
- 10 Q&A

SagaBrand: Sagaci Research's off-the-shelf solution

Live and continuous brand health performance tracker
based on a syndicated online survey



Up to **10,000 interviews** per year per brand



Representative sample of the adult population in each country



Online Dashboard & Downloadable Reports



Brand tracker

Measures and assesses **brand indicators** for your own brand but also **competitors** with the ability to zoom in on **sub-target groups**



Ad tracker

Measures and assesses the efficiency of your marketing activity.

Benchmarks your **performance** vs. competition



Competitive watch

Tracks **category specific trends**
Understand and analyze your competitors' trends

SagaBrand outputs

SagaBrand | The continuous tracking tool for brands across the African continent

25 KPIs analysed by demographics and waves

Access to data insights

- Daily data collection with monthly, quarterly or biannual access to performance updates
- Online Dashboard & Downloadable Reports



Brand Performance indicators



Awareness



Ever Purchased



Echo



Recently Purchased



Reach



Preferred



Consideration



Purchase Intent

Brand Health indicators



Satisfaction Score

Satisfied / Neutral / Dissatisfied



Recommendation Score

Recommends / Neutral / Avoid



Quality Score

Good / Neutral / Poor Quality



Echo Type

Positive / Neutral / Negative Echo



SagaBrand Score = average of all KPIs indicating brands' overall market position

“

**The improvement in trends is encouraging
and the reports shared during the year very
helpful**

”

- SagaBrand FMCG Client, 2022

Agenda



- 1 Introduction to Sagaci Research
- 2 Benefits of brand tracking
- 3 Case study 1: Assessing the impact of marketing campaigns
- 4 Case study 2: Compare brand performance against the competition
- 5 Case study 3: Assessing the impact of external market shocks
- 6 Case study 4: Compare brand performance between countries
- 7 Case study 5: Be aware of up-and-coming brands
- 8 Case study 6: Diagnose brand strengths and weaknesses
- 9 Solutions by Sagaci Research
- 10 Q&A

www.sagaciresearch.com
contact@sagaciresearch.com



Julien Garcier
Managing Director

julien.garcier@sagaciresearch.com



Caitlin Guillet
Product Manager

caitlin.guillet@sagaciresearch.com

Copyright and disclaimer

© 2023 Sagaci Research Ltd. All rights reserved.

All information, analysis, forecasts and data provided by Sagaci Research Ltd is for the exclusive use of subscribing persons or organizations (including those using the service on a trial basis). All such content is copyrighted in the name of Sagaci Research, and as such no part of this content may be reproduced, repackaged, copied or redistributed without the express consent of Sagaci Research Ltd.

All content, including forecasts, analysis and opinion, has been based on information and sources believed to be accurate and reliable at the time of publishing. However, in view of the natural scope for human and/or mechanical error, either at source or during production, Sagaci Research accepts no liability whatsoever for any loss or damage resulting from errors, inaccuracies or omissions affecting any part of the publication. All information is provided without warranty, and Sagaci Research makes no representation of warranty of any kind as to the accuracy or completeness of any information hereto contained.