

# Sunday Times TOP BRANDS

Avusa Media Supplement

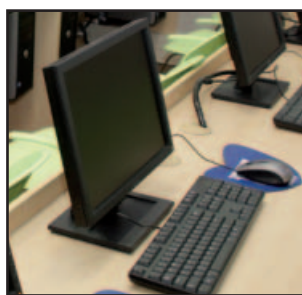
29 August 2010

WHAT A  
YEAR  
WHAT A  
COUNTRY  
WHAT A  
BRAND



Brand South  
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Sunday Times  
TOP BRANDS

Winners Celebrated

# Two new awards to die for

*Wayne Rooney may not be the sharpest pencil in the box, but he knows enough to understand that the respect of your peers is always the most important recognition of all*

Andy Rice

So when Wayne was voted the Professional Footballers' Association's Player of the Year in England, he was able to articulate (just) his pride in being singled out by his peers for particular praise.

And so it is for the first of the two new awards that grace the Sunday Times Top Brands survey this year. The Marketing Personality of the Year trophy is awarded to the individual who, in the eyes of his fellow marketing

professionals, has done more to further the cause of successful brand building than anyone else over the last 12 months.

This is not an easy award to win, but it comes with the same chest-swelling sense of pride that Rooney must have felt, because no matter how supportive your mother, your wife, your kids and your staff may be, it's your industry peers who really can tell the champs from the charlatans. And this year's inaugural winner is certainly a champ. Serame Taukobong has a CV to die for: Unilever-trained, then on to the SAB

"brand academy", followed by a spell at M-Net and then a plum role in MTN's international expansion programme.

Serame's success in the competitive field of marketing and branding creates more



Serame Taukobong

ammunition for those militants (myself included) who believe that most academic qualifications are overrated. Serame's primary university degree was in biochemistry, not an obvious entrée into marketing. But if you are sussed enough to measure candidates not by what they have learned, but by how they think, then Serame's your man.

The second new Top Brands award

celebrates teamwork, by acknowledging the behind-the-scenes contribution that is so often made by winning brands' communications agencies. Fittingly, this award has been named in honour of the late Robyn Putter, the creative and strategic genius behind Ogilvy's contribution to the sustained success of their clients' brands.

I was lucky to have been a small part of the team that back in the early 1990s was responsible for formulating a new global positioning for the Ogilvy group. Robyn Putter was a pivotal contributor to the debate that eventually culminated in the adoption of "brand stewardship" as the Ogilvy offering.

It seems that this legacy has been sustained to this day, because Ogilvy Johannesburg is the inaugural winner of the Robyn Putter Brand Agency of the Year award. This award is earned the hard way – through the successes of the agency's clients. Across all of the Top Brands winners, Ogilvy Johannesburg was the agency responsible for more finalists and winners than any other.

Robyn would be happy to see his legacy enduring.

## Tried and tested

*This year's Top Brands Survey shows that strong brands have weathered the recession better than newer ones, as customers returned to the brands they know and love*

Andrew Gillingham

Neil Higgs, director: innovation and development at TNS Research Surveys, says that although the present research regime has only been in place for two years, it is possible to track developing trends.

For example, this year's survey clearly showed that in the tough economic conditions people reverted to familiar, well-known, iconic brands.

He says that this is typical recession behaviour as people stop experimenting. Money is tight so they cannot take chances on brands that may not perform. Generally, lower-income individuals tend to buy the established brands while richer people often try out new brands as the consequences of a brand that does not deliver are not as serious.

With prudence the order of the day, many people opted to rein in purchasing, particularly of larger items. The sharp drop in car sales during the recession shows this, as people decided to hang on to existing vehicles.

Today, consumer confidence is up and car sales are up by 28% this year compared to last year.

"For many people the recession focused their attention on survival. There were significant job losses and, at the same time, our consumer confidence measure showed a massive decline. While South Africa was not as badly affected as many other countries, breadwinners were under a lot more pressure as, in many cases, they had to stretch their income to provide for other family members who were out of work," Higgs says.

TNS added eight new categories to this year's survey, including essential foods, canned foods, household cleaning, laundry care, personal care, beauty and cosmetics, hot beverages and mouth care. Some categories disappeared, such as sunglasses and watches.

"The survey has a more down-to-earth set of categories this year, bringing it into line with the environment in which customers are making their buying decisions," Higgs says.

In addition, the survey was

stricter in terms of its application of its measures.

Non-user perceptions stayed a key element, counting for half the weighting of users.

However, the criterion governing users was tightened and to be counted as users, respondents had to have used the brand within a minimum timeframe, such as one month for fast-food brands, 12 months for fashion clothing, and two years for cars.

This change caused some shifts in the results as people could not rely on brand memory but had to provide their assessment based on recent experience.



P3: Market returns

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Marketing Returns

# Morale booster

*The 2010 FIFA World Cup is one of the top country brand marketing exercises of all time*

Andrew Gillingham

“There has never been anything comparable to 2010 done anywhere else on the African continent, though the Muhammad Ali vs George Foreman fight hosted in the former Zaire in 1974 also succeeded in shining a very positive international spotlight on the continent,” says Enver Groenwald, GM: marketing and communication at Avusa Media.

He says no one could have wished for a more organised, better-run sports spectacle than the 2010 World Cup.

Furthermore, the benefits to South African far exceed the costs and the return on this country’s investment will flow into the economy for years to come.

“The marketing return will far outstrip any immediate cash benefit. We

are already starting to see the tip of the benefits iceberg in the form of the recent announcement by British Airways that, at a time when the airline is rationalising its flights around the globe, it has opted to increase the number of flights coming into Cape Town,” Groenwald says.

There are other spin-offs, namely that South Africa was able to use the World Cup to showcase a number of this country’s pockets of excellence.

The stadiums were constructed in record time. “Against all expectations that there may have been to the contrary, we delivered them on time and to the highest international standards.

“In addition, through sponsorships, many homegrown brands, such as First National Bank and MTN, achieved an international profile and established themselves as global brands in their own right,” Groenwald says.

At a time of heightened concern about security around the world, the South African Police Services came to the fore magnificently, ensuring one of the safest spectacles in World Cup history, he adds.

“There are also a number of social benefits that are flowing from the event. Further, we are likely to see an increase in the number of offshore companies voting with their wallets and opting to invest directly in South Africa. Moreover, even in the short space of time since the World Cup we are already seeing the tourism benefits,” Groenwald says, adding that South Africa has come into its own as a maturing democracy that has demonstrated its ability to pull together on all fronts.

“The World Cup has boosted morale in this country and made ‘Proud to be South African’ a reality rather than just a



Enver Groenwald

*Continued on page 6*

P4: Investing for success

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succeed, try, try  
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TOP BRANDS

Investing for Success

# The top marketers speak out

Once again – the seventh year – we asked the top marketers to bare their souls and talk about their inner feelings

Jeremy Sampson

Now this is a rare treat, as those who are the chief marketing officers (CMOs) of the top brands in the land are renowned as a group that, while having considerable budgets, is under huge pressure to deliver. Their time is always under pressure, they are highly secretive, yet they wield huge power and touch the lives of all of us. Age averages 35 – 50, but experience is highly valued in these tough conditions. Increasingly brands are seen as the major assets of companies. This survey celebrates the winners, those who with almost boring consistency stay at the top of the polls. It does not happen by accident. Rather it is a tribute to the marketing team who maintain the momentum, and to the company that owns these brands for consistently investing in their future success.

Considering that Reckitt Benckiser is

consistently investing globally 12% of its turnover on marketing, is to show the sort of muscle it is able to exercise.

We still live in recessionary times. Some see the green shoots of spring, but the majority sees the difficult times lasting for some time to come.

Those who responded represented brands from a wide range of categories, in no order: the First Rand Group (FNB, RMB, Momentum, Wesbank), Kulula, Mercedes-Benz, Telkom, British Airways, Liberty, Tsogo (includes Montecasino), Ceres, Stanlib, LiquiFruit, Caltex, The Discovery Group, Nedbank, Nescafé, Parmalat, Simonsberg, Bar One and MTN. For which great thanks.

While not all budgets are public knowledge, and marketing spend has many grey areas, we can safely assume that the brands listed spend a total of between R2.5- to R3-billion annually. That's a lot of money.

This is the feedback we received:

To some the big event of the past year was FIFA and 2010

- One big project, not lots of small ones
- The halo effect
- The country came together
- But to the majority 2010 was about:
- Acceleration of social media
- Fragmentation of the media
- New legislation
- Digital, digital, digital
- Aligning the internal with the external
- Our brands enjoying increased recognition internationally
- Growth of cheap, value offerings
- Still adapting the company from buoyant economy to no growth / low growth

And a dream brand to work on apart from the total dedication to the brands already worked on

- South Africa
- McLaren (Formula One)
- Apple
- Cirque du Soleil
- Greenpeace
- Ferrari
- Capitec

An interesting list of global megabrands and one local brand making waves.

And the new trends emerging

- Merging of creative and media
- Social media accelerating into mainstream digital marketing
- Consumers remain willing to pay for established 'safe' brands
- Communities vs. segments – so-called new media, etc.
- Environment and sustainability are now marketing issues
- Trading down
- Extreme consumerism and individualism coupled with a philanthropic, community-oriented zeitgeist
- Impact of traditional advertising methods are diminishing

What keeps them awake at night?

- Keeping the brand promise of helpfulness alive among customers and staff alike
- Budget and time
- Where to for my next job!
- The challenge to change perceptions
- The lack of depth in marketing skills
- Managing two very different brands
- South Africa's macro socio-economic challenges
- Nothing!
- Untapped opportunities, new frontiers to conquer and exciting ideas to explore

What are they most passionate about? Being relative and creative

- The power of a truly brand-centric corporate culture
- Leading
- Raising the bar
- Explaining the business impact of marketing
- South Africa
- Raising awareness and understanding of marketing and brand at board and exco level
- Seeing brands grow and prosper
- Driving continuous improvement for the benefit of customers

So there we have it. By all accounts a very challenging year indeed, with the impact of FIFA 2010 still to be accurately gauged and its impact extremely selective. But as a group the CMOs come across as very professional and battle-hardened, for the most part hanging in there and grinding it out in a world that is getting ever more complex and challenging.

No mention of the rest of Africa, nothing about the strong rand, lots of patriotism, little sign of the good times returning just yet.

But a major challenge remains: the education of boards and ExcOs to the crucial role marketing and brands play.

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P6: Must-have brands



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## Must-have Brands

*Continued from page 3*  
slogan. “This achievement is amply illustrated by the subsequent Bafana Bafana game against Ghana which saw South Africans from all walks of life make their way to the stadium in Soweto. “People pulled together to support the national soccer team and this upsurge in support must have helped our

team achieve victory against Ghana,” Groenwald says.  
While Bafana Bafana had not performed at peak for some time prior to the World Cup, the team changed all that when it came up against the world’s top soccer nations in the event itself.  
Turning to the Top Brands Survey, Groenwald says that the survey has

particular relevance in light of the recession and its effect on consumer spending.  
“A brand that has established itself in the marketplace often allows the manufacturer or brand owner to charge a premium for the product or service. This protects the company’s margin.  
“Therefore, the Top Brands Survey

highlights those companies that have successfully invested in their brands and thus protected their revenue streams even in a recessionary environment. A brand’s success is demonstrated by consumers consistently supporting it despite being under pressure,” Groenwald says.

Therefore, he points out, those companies whose brands feature in the Top Brands Survey will tend to generate better revenues than many of their peers as they have some built-in protection and consumers still see their brands as “must haves” rather than “nice to haves”.

Further, Groenwald says that leading brands support their marketing and advertising spend during recession, helping their products to gain market share in an environment where their competitors are pulling back and cutting their brand investment.

Top Brands also helps consumers by shining the spotlight on brands that have stood the test of time.

The Sunday Times itself is one such brand, having been established more than 100 years ago and hence its association with other iconic brands through the Top Brands Survey.

“Iconic brands understand their markets, reinvent themselves consistently in a responsible fashion, and ensure that they remain fresh and relevant,” Groenwald says.

In addition to recognising the brands that find the most favour with South African consumers, Top Brands also awards those companies that have had the courage to successfully take their brands in new and innovative directions.

The 1990s saw a lot of repetitive brand building, with a strong focus on trends in western European and North American markets. There was little effort made to strike out and develop true iconic South African brand images.

However, some brands, by virtue of their brand marketing teams, have managed to become household, South African, brand names. “Those brands have taken on lives of their own.

“Every so often a brand personality comes along that understands the emotional link that consumers form with their favoured brands. This year’s Marketing Personality of the Year – Serame Taukobong, chief marketing officer at MTN – fully recognises the bond between brands and consumers,” Groenwald says.

Acknowledging the other side of the brand-building equation, Top Brands has also created the Brand Building Agency of the Year Award.

“This year’s inaugural award has been launched as the Robyn Putter Award in honour of the Ogilvy Group’s worldwide creative director.

“Sadly, Robyn Putter passed away from cancer. He was the doyen of the South African advertising industry and was credited with some of the most memorable brand advertising campaigns that South Africa has ever seen.

“It is both a tribute to the man and indicative of his legacy that this year’s award winner is Ogilvy Johannesburg,” Groenwald says.

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TOP BRANDS

Community Upliftment

# Make brands healthy

Brands are still learning to properly apply Corporate Social Investment

Andreas Sieren

eMalahleni in Mpumalanga, formerly known as Witbank, is a municipality that faces much the same problems in the education sector as many other towns in South Africa. The Vodacom Foundation recognised this gap and decided to create an ICT Resource Centre to provide e-education facilities to educators and learners. The foundation, set up in 1999, is the Vodacom Group's corporate social responsibility arm.



K'Naan performs Wavin' Flag in Soweto at the final stop on the Coca-Cola Trophy Tour

Vodacom scored high in the 2010 TopBrands Survey, coming in second after Coca-Cola in the category 'brand done the most for community upliftment'. This is up one place from its

third-place ranking last year. This survey, conducted by market research company TNS Research Surveys, found that the mobile telecommunications company is spearheading a trend in South African corporations to invest in communities: corporate social investment (CSI). Such investment is becoming increasingly sophisticated and sustainable.

Mthobi Tyamzashe, chairman of the Vodacom Foundation, knows companies have an advantage when they use core business expertise to find solutions to social problems: "In view of business's vested interest in community members as current and future customers and employees, the importance of complementing government's efforts in community upliftment programmes has become a business imperative for investors with a long-term view of the future."

The ICT Resource Centre in eMalahleni, opened in June 2010, offers 50 computers, educational aids and internet connectivity. Partners in the initiative include the Department of Education, along with IT big hitters Microsoft, Dell and Cisco. The Vodacom Foundation intends to establish a resource centre in each province in the country. Says Tyamzashe: "There is no doubt that e-education will be at the heart of future excellence in education, and has the potential to play a crucial role in the training of South Africa's teachers to be effective educators."

CSI or corporate social investment

was established as a concept in the early 1970s. Its central idea is corporate self-regulation as an integral part of a business model. Businesses are expected to observe legal and ethical standards and apply international norms within their operations.

In essence corporate social investment emphasises stakeholders rather than shareholders.

More recently, the term Triple Bottom Line (TBL) became prominent as a framework for developing and evaluating CSI. It guides a value system that lets companies measure success on a broad spectrum, including economic, ecological and social impact. TBL, also known as "people, planet, profit", has been ratified by the United Nations.

For Gordon Cook, the co-founder and national school navigator of Vega, The Brand Communications School, in Johannesburg, the TBL approach is not yet fully developed. He supports ideas that promote responsible branding by applying a more holistic approach. "CSI has to become a much more core business than to do good. We are still at a stage where financial profit is the main thing to shareholders."

Cook is concerned about the velocity at which global brands roll out their consumption campaigns. Cook has a suggestion: let's look at the health of a brand. An article he co-authored argues that despite managing meaningful CSI programmes, some brands continue to have an unhealthy impact on their environment.

Continued on page 12

P10: Hitting the right note

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**Sunday Times**  
**TOP BRANDS**

Hitting the Right Note

# Get me the feeling

*Coca-Cola engages people in rolling out their corporate social investment campaign. The impact is momentous*

Andreas Sieren

It is a simple song with a strong rhythm and a chorus easy to remember. Wavin' Flag by the Somali-Canadian artist K'naan became the unofficial anthem of the recent 2010 FIFA World Cup in South Africa. It got the masses moving and excited. The song was

regularly played before the beginning of a match and people in stadiums or fan parks would start to wave flags or trumpet vuvuzelas. Everybody joined in when K'Naan sang "When I get older, they'll call me freedom just like a wavin' flag ..." Wavin' Flag, it became obvious, united fans. In Africa it became a rallying cry for pride and unity.

In this Coca-Cola seems to have found the right combination of mixing brand management with engaging the people. In the Top Brands survey, Coca-Cola came first in the category "brand done the most for community upliftment".

Wavin' Flag was part of Coca-Cola's promotional campaign around and during the FIFA World Cup. The company sponsored 20 000 tickets for young people from 200 schools. Two programmes provided youth the opportunity to become a member of either the official flag crew or ball crew – after qualifying through a competitive community development project focusing on recycling. Coca-Cola also branded and equipped 1 000 township taverns with televisions.

K'Naan performed the song in 13 African countries as part of the FIFA World Cup Trophy Tour that allowed the fans to get close to the most important sports trophy in the world.

According to Sandya Leckram, senior brand manager of Coca-Cola South Africa, Coca-Cola is the universal icon of happiness, globally promoted in 2009 through the Open Happiness Campaign. "For over 120 years, Coca-Cola has been inviting people around the world to enjoy life, and this remains the key legacy which the brand continues to build, showing that optimism will take us anywhere we want to go." That includes corporate social investment (CSI).

In South Africa, the Coca-Cola Company runs a comprehensive CSI campaign that includes sectors such as workplace, community, marketplace and environment. Community activities range from recycling, water, and health to entrepreneurship and education. With a range of partners Coca-Cola promotes responsible marketing, encourages environmentally friendly activities and supports active lifestyles. The latter produced the Pan-Africa COPA Coca-Cola Football Stars schools tournament that brought together teams from 14 African countries.

Zayd Abrahams is the head of marketing for the Sparkling Category at Coca-Cola South Africa. He tries to understand what teenagers are all about: very self-assured, confident, and clear about what they want and don't want. "So you give them an experience they won't forget. We are making the brand relevant and entertaining," he says.

Coca-Cola re-invests some of its profits and, according to its own description, shows "an enduring commitment to building sustainable communities" and focuses on "initiatives that protect the environment, conserve resources and enhance the economic development of the communities" where it operates.

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P12: Development work





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Continued from page 10

They came up with a number of healthy brand indicators. These ask critical questions about brand purpose, authentic communication, sustainable relationships and added value to peoples’ lives. “The healthy brand respects that collectively, these indicators need to be believed in and upheld to grow revenue. The healthy brand argues that its reason to exist leads to its business practice and that profit is a consequence of, rather than a reason for, this practice.”

Locally, a number of companies have applied social responsibility successfully, show the results of the 2010 Top Brands Survey. Top of the list is Coca-Cola, which used the 2010 FIFA World Cup to couple brand management with engaging communities. Vodacom came second, Pick n Pay third, Shoprite Checkers fourth. Number six was MTN.

Through its MTN Foundation, established in 2002, a new integrated whole-community development strategy was adopted in 2008. It focuses on benefiting selected cluster communities in six South African provinces, tackling development shortcomings in education, health, entrepreneurship, and arts and culture. Almost two-thirds of the CSI



The ICT Resource Centre in eMalahleni donated by the Vodacom Foundation

budget is spent on education, particularly on school connectivity, and interactive tele-teaching platforms. Says Eunice Maluleke, head of MTN SA

Foundation: “Our education portfolio is successful because it is anchored where other portfolios of health, entrepreneurial, arts and culture converge to provide an integrated approach to develop learners holistically. Our capacity development programmes in critical learning areas of maths, science, technology and literacy combined with life skills are targeted at both learner and educator to leave an everlasting impact. The aim is to break the cycle of poverty.”

That is easier said than done. Corporates are swimming in deep waters when engaging in development work, which is traditionally far removed from their core business: getting and keeping customers through marketing and selling of a product. The learning curve is steep.

“Brands that interact directly with people and create an experience are doing well,” says Debbie Booth, client service business manager with TNS South Africa, the company commissioned to conduct the research for the Top Brands 2010 Survey. That explains the success of Coca-Cola in the survey. TNS asked the 3 000 survey respondents questions about favourite brands, uplifting community contribution,

environmentally friendly and greatest impact on marketing campaign. Consumers ask themselves how brands can add value to their lives.

The latter is a phenomenon which applies more to developing countries where people live in communities that often lack adequate public service delivery – a common problem in South Africa. Here, social boredom and limited perspectives, especially for the youth, can be interrupted by an exciting event, such as a sports tournament or a community project. It is the experience that counts and brands are beginning to understand and provide this.

There is institutional support. As of June 2010, the Johannesburg Stock Exchange requires all listed companies to submit an annual integrated report. Previously companies were obliged to provide an annual financial report and a separate sustainability report. The integrated report is a lot more holistic, including information on environmental, social and economic impact, which is measured alongside financial performance. The Integrated Reporting Committee (IRC) of the JSE is developing reporting guidelines for companies that will also include best practices.



## 1st for women



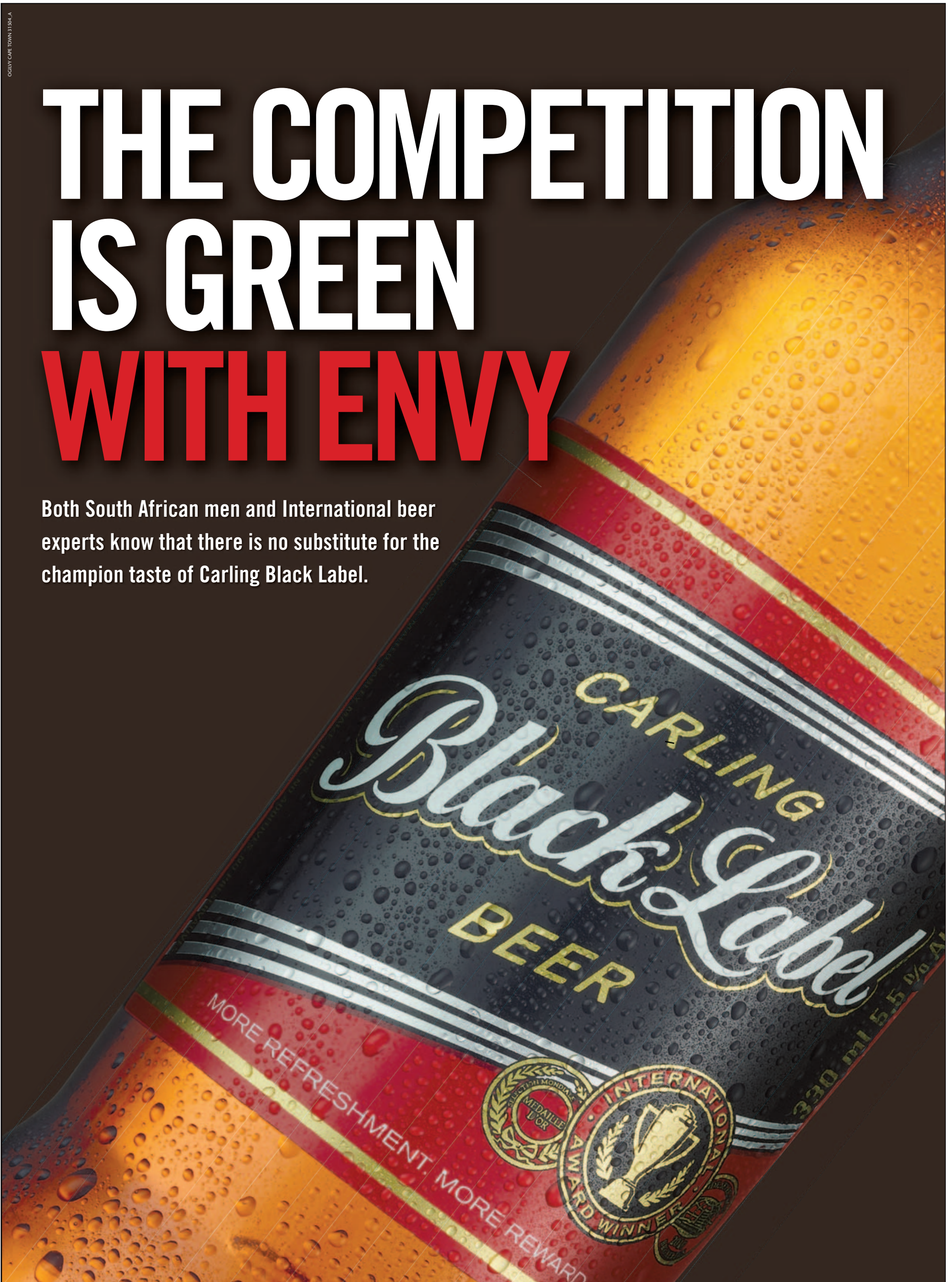
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Sunday Times  
TOP BRANDS

Brand Welfare

# Brands beat the recession

The results of the Top Brands survey in the business-to-business sector suggest a certain resilience to the recession

Erica Webster

“One would expect air travel to be one of the first things people would cut back on in a recession in the business sector, but we didn’t see a decline in this area,” says TNS Research Surveys business manager Debbie Booth. “What we did notice was that while many businesses were still keen to continue using SAA, there was a greater tendency to choose a no-frills airline with an increase in usage of Mango, Kulula and 1Time.”

In the business-to-business category Comair came in strong with British Airways taking top spot, followed by Kulula. SAA took third position. In the business-to-consumer category, on the consumer front SAA maintained top position with British Airways in second place and Mango in third. Kulula was fourth and 1Time fifth.

So while business-to-business



appears to have come out relatively unscathed, the same cannot be said for the business-to-consumer survey, which suggested greater susceptibility to recession regression.

“Cars are probably the category most

influenced by the recession. The market dropped by 40% virtually overnight, so it really was doom and gloom. The category is now in recovery mode,” says Booth. BMW came first, with Toyota second and Volkswagen third.

Andy Rice, chairman of Yellowwood Future Architects, says the car market is a prime example of how changing from one brand to another during a recession is false economy. “Buyers in the car market still understood value, but just postponed buying decisions. It’s a good measure of what brand value and equity is all about – when the chips are down the brands that win are the ones that have built that equity.”

Whisky remains the tippie of choice, with seven out of the top 10 spirits being whisky brands. Brand choice may be partly cost-driven, says Booth, but brands that have stuck it out in the recession and have continued to communicate with consumers have enjoyed success. “This year’s new winner – Bell’s Whisky – has been doing a lot of above-the-line communication. The campaign resonated with the South African population.”

Last year’s winner, Jack Daniel’s, came fourth while Johnnie Walker came second and J&B came third.

Jeremy Maggs, editor of the Marketing Journal, says in order to survive the recession brands need to punch smarter and above their weight. “You can’t just hide your head in the sand and hope for the recession to pass. You’ve got to come out fighting and, more than ever, give people a reason to

engage with the brand, whether through advertising, promotion, incentive or all of these – brands can’t be shy at a time like this. The brands that work harder will survive this recession a lot better.”

Booth says beer is a closely contested category, with Carling Black Label staying at number one, Amstel rising to second place, third place to Castle Lager, while Heineken dropped to fifth place.

A new category – essential foods – sees Tastic leading by a long way.

“This came as a surprise, because we thought the mieliemeal brands like White Star, Ace and Iwisa would come out strong. Tastic was competing with the likes of these key staple foods, but it is a brand with very strong brand clout as well as delivering on what the brand has promised.”



P16: All the winners



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16

Sunday Times  
TOP BRANDS

All the Winners

# When the going gets tough...

*‘Recession resilience’ was a feature of this year’s business-to-business survey results, which remained stable in comparison with last year’s results*

David Jackson

Despite the economic downturn, the travel sector typified this resilience well, with the hotel category showing growth.

British Airways performed strongly in the airlines category, again taking top honours, followed by Kulula.com.

Avis leads the car-hire pack but Europcar’s rebranding seems to have made an impact. Europcar moved up the rankings to second place this year, shifting Budget down to third place.

Says Dawn Nathan-Jones, CEO of Europcar South Africa (the former Imperial Car Rental): “Becoming a global player made good business sense. And our corporate customers in South Africa needed a global reach and network.”

The hotel group category has seen the most shifts. A tightly contested category sees Hilton winning (up from second in 2009) with last year’s winner – Sun International hotels and resorts – slipping down to third position.

In cellphones, Nokia remains the clear winner but Blackberry and iPhone show a dramatic increases in usage as well as relatively higher brand ratings.

Apple Mac is number one in the computers and laptops category, pushing HP down to second place.

In the business banks sector, Standard Bank stays number one, followed by FNB, with Nedbank third.

The medical aids category is dominated by Discovery Health, with Momentum in second place.

In the long-term insurance sector, Discovery Life is the category winner this year, repeating last year’s performance, with Alexander Forbes climbing from fifth last year to second this year, and Liberty in third position (dropping from second last year).

In the short-term insurance category, Outsurance is the winner (moving up from fourth last year). Santam drops from first last year to second place, with Mutual and Federal in third place.

In the electronic business media – radio, sister stations Talk Radio 702 and Cape Talk 567 take first and second place respectively. 702 is the clear winner.

In the electronic business media – TV category, Sky News is the channel of choice for business news, followed by CNN. e-News is in third position but is first in terms of ‘local’ news channels.

The business-to-consumer survey results were more susceptible to the ‘recession regression’. In the airlines category SAA were the winners again, followed by British Airways in second place and Mango in third.



Dawn Nathan-Jones CEO of Europcar South Africa

In the car category, BMW took top spot with Toyota close behind in second place and Volkswagen third.

The petrol stations category was won by BP, marginally beating Engen, with Shell in third position. The survey was conducted before the recent BP oil spill.

In financial services, the retail banks sector was won by ABSA, followed by

FNB with Standard Bank in third place.

Old Mutual again won the long-term insurance category, with Sanlam moving from fourth to second and Metropolitan Life dropping from second to third.

First For Women took top position in the short-term insurance category, followed by ABSA Insurance, and then by Outsurance (last year’s winner).

P18: Feel good factor

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18

Sunday Times  
TOP BRANDS

Feel Good Factor

# Aspirational brands

*When times are tough, a little bit of what you fancy often does you good – an adage supported by findings in this year's Top Brands research survey*

David Jackson

Consumers under financial pressure during the recession have not been averse to splashing out on the odd luxury to lighten the economic gloom, sometimes aspiring to brands that are normally beyond their budgetary reach.

Companies in the business-to-business section were found to be more resilient in withstanding the recession, compared with the business-to-consumer component.

In the chocolates category, results showed that people were prepared to spend on indulging themselves to help them feel better in tough times. Alcohol is another “recession-proof” category that weathered the recessionary storm.

Many premier brands of chocolate, such as Lindt and Ferrero Rocher, have

climbed the ladder quite substantially. Lindt took third place in the chocolates category, behind repeat winners Cadbury slabs and second-placed Lunch Bar.

And while consumers have tried to cut out non-essential purchases during the recession, aspiring to an occasional treat is difficult to resist – especially one that titillates the palate.

Brands which continued to communicate with consumers during the recession also placed themselves in a favourable position. Says Jeremy Sampson, executive chairman of the Interbrand Sampson group: “Younger people of all races, including many young executives, aspire to status symbols – whether it be a Lindt chocolate, a BlackBerry smartphone or a BMW.”

Another fashionable aspirational brands rocketing up the popularity



ladder is BlackBerry. Last year it fared well in the Business-to-business section – now its appeal embraces the business-to-consumer category as well.

According to Deon Liebenberg, regional director Sub Sahara Africa for Research In Motion (RIM), the company behind the BlackBerry solution: “If something is aspirational but doesn’t

deliver on what it promises, then over time that aspiration will disappear.

“BlackBerry enables successful people to have control in their busy lives – both business people and consumers. People are on the move and time is of the essence. BlackBerry is constantly telling you what is happening in your life, and it happens at the moment you need it.”

P20: Survey results

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*We're very proud to have been voted one of the Top 3 brands in the Sunday Times 2010 Top Brands Survey!  
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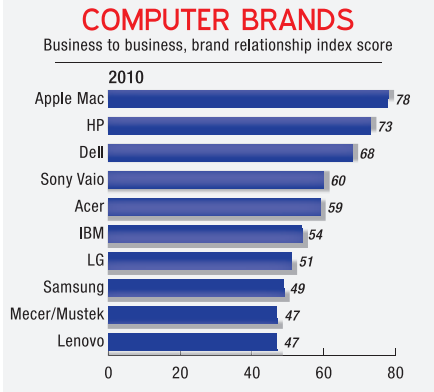
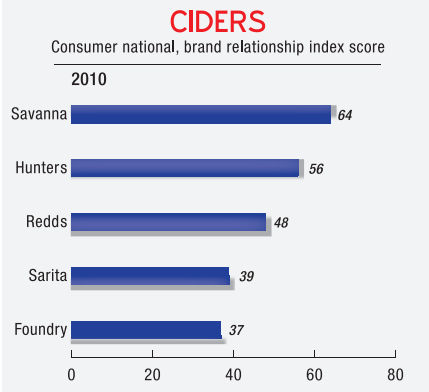
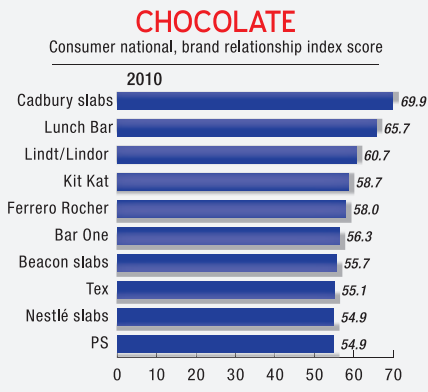
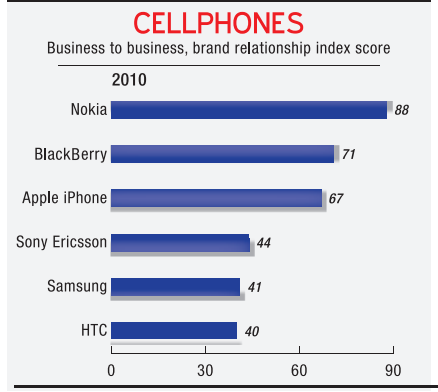
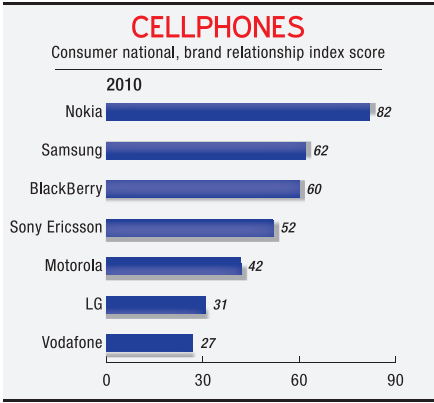
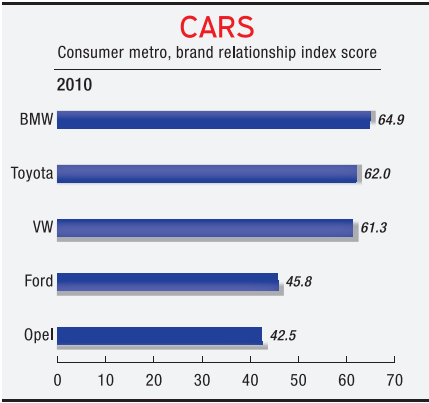
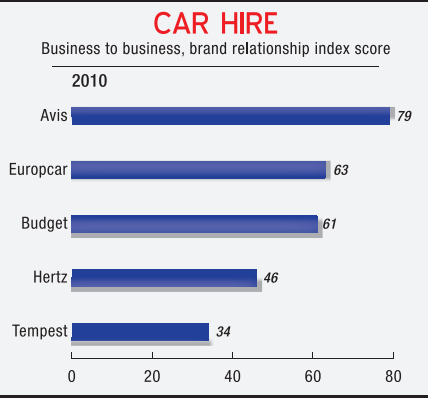
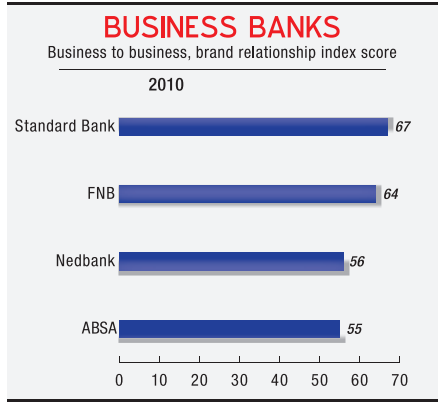
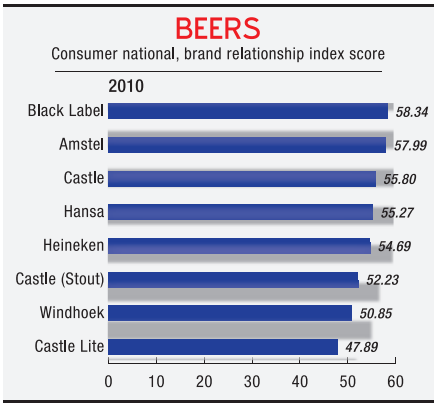
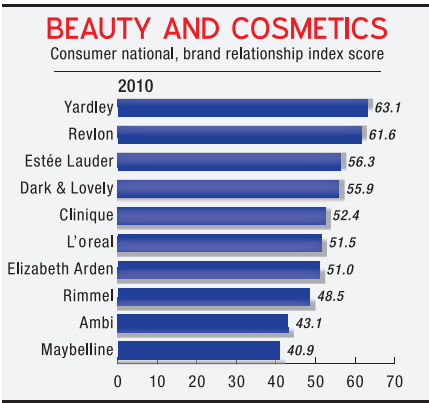
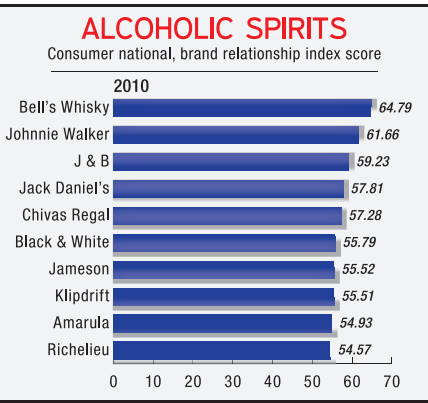
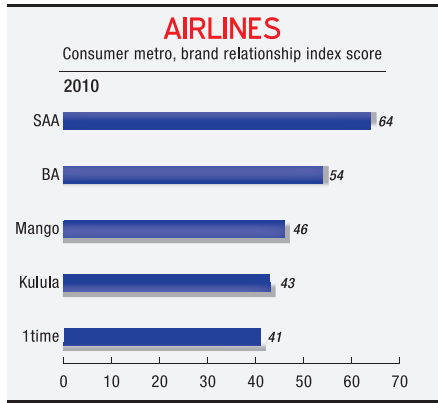
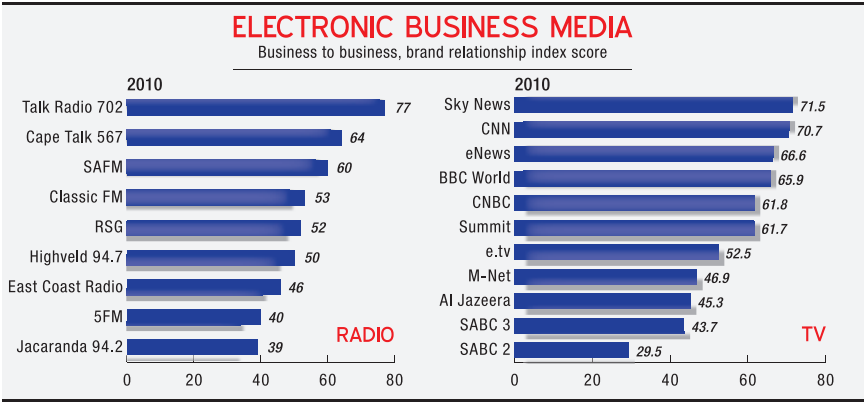
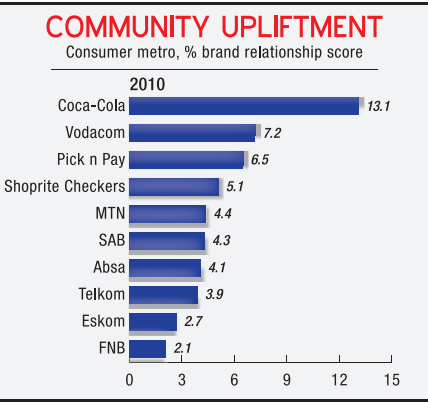
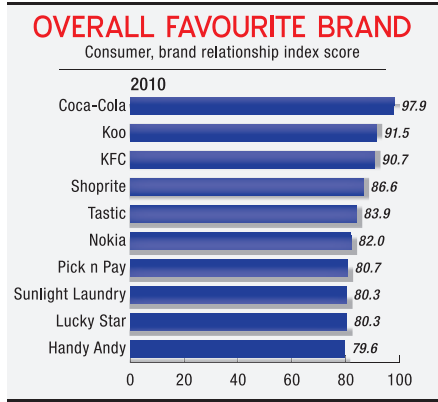


20

Sunday Times  
TOP BRANDS

Survey Results

# Brand leaders



P21: Graphs

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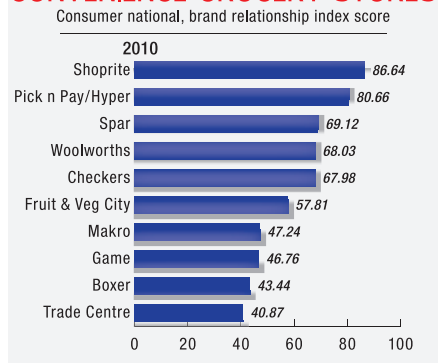


Survey Results

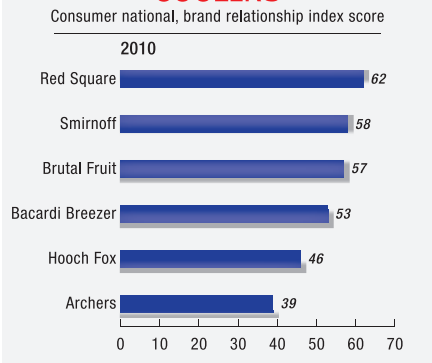
Sunday Times  
TOP BRANDS

21

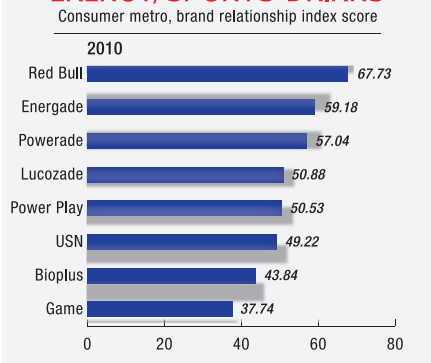
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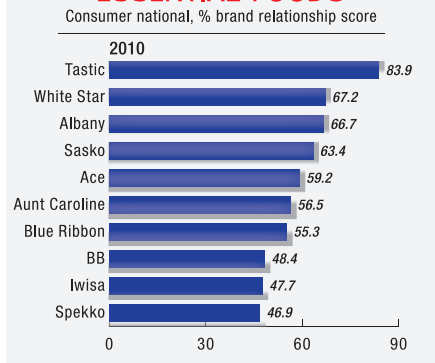
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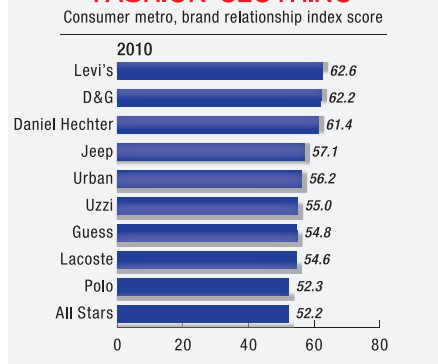
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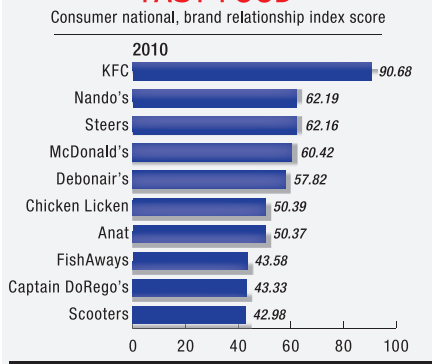
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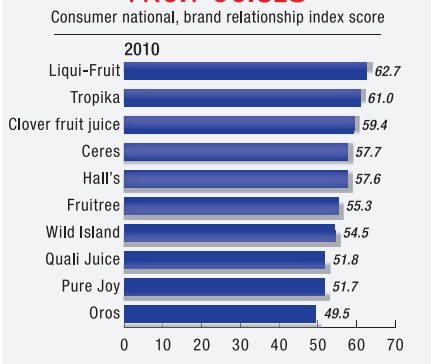
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FAST FOOD



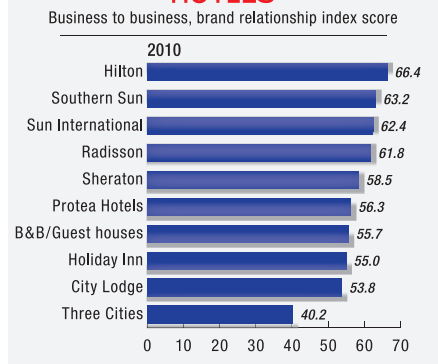
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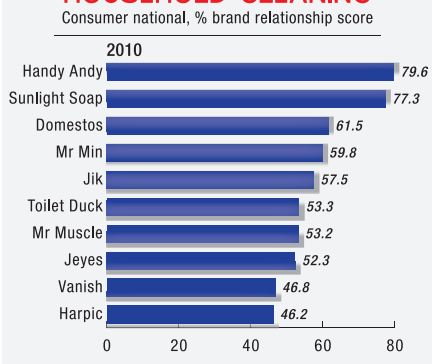
HOT BEVERAGES



HOTELS



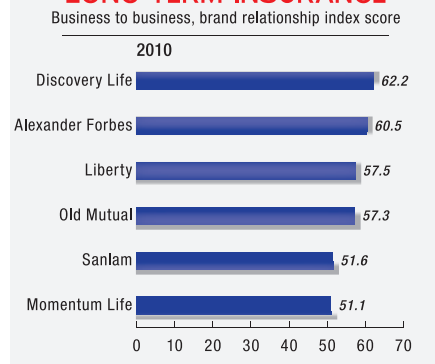
HOUSEHOLD CLEANING



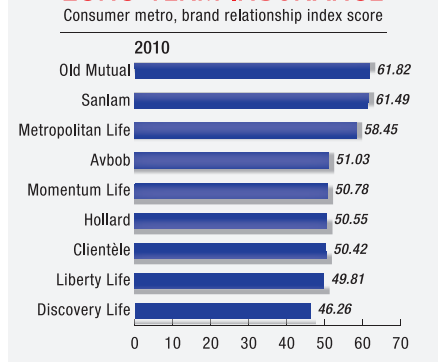
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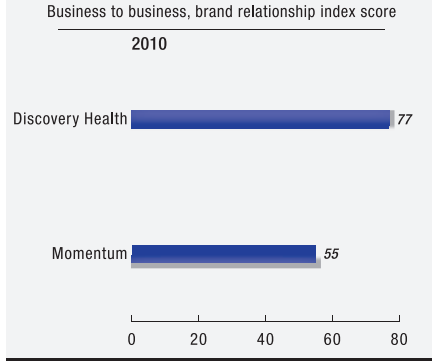
LONG-TERM INSURANCE



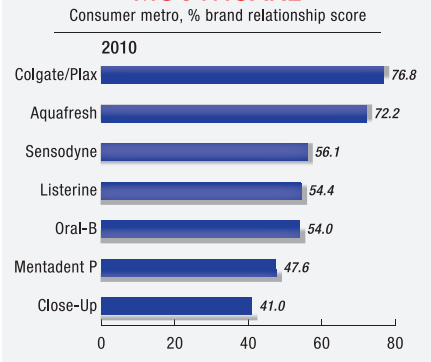
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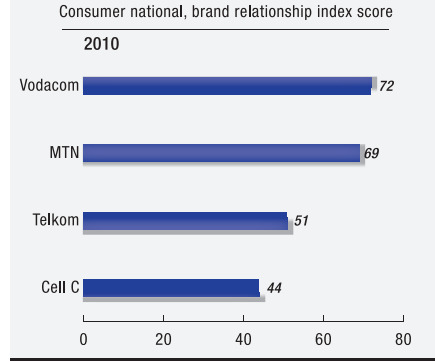
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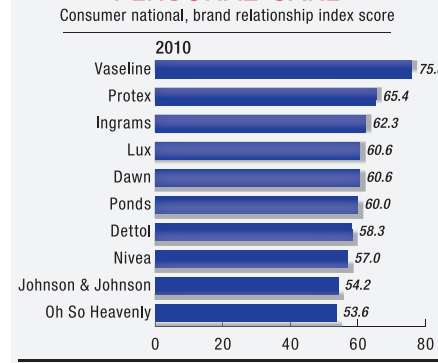
MOUTHCARE



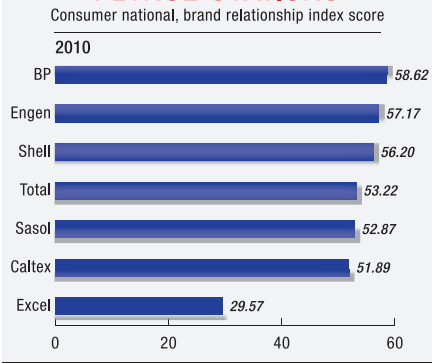
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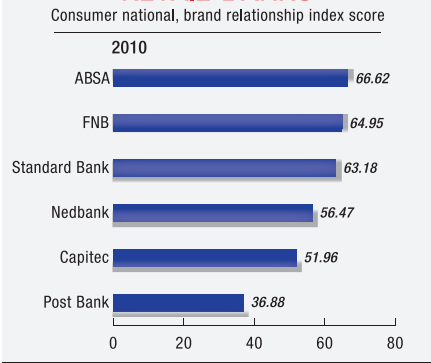
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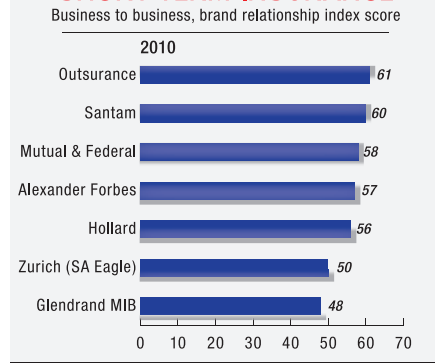
PETROL STATIONS



RETAIL BANKS



SHORT-TERM INSURANCE



P22: Graphs

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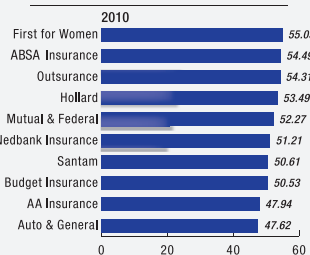
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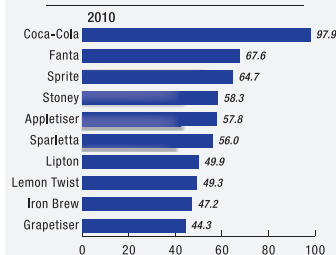


## Survey Results

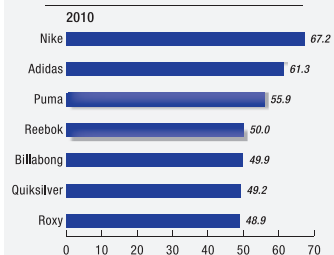
## Consumer metro, brand relationship index score



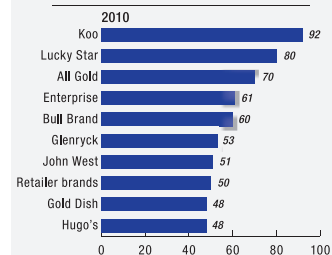
## Consumer national, brand relationship index score



## Consumer metro, brand relationship index score



## Consumer national, brand relationship index score



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a. Kishoff, Lielze Vermeulen, Shireen Clayton, Gerard Mare, Thys van Vuuren, Chris Richards, Terry Pingle, Helen Cassarichs and Arends Dippenaar. Congratulations from your ad agency on achieving this magnificent accolade. If anyone deserves recognition, it's you guys. 4925 Eng



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24

Sunday Times  
TOP BRANDS

Environmentally Friendly

# Going green is worth it

*The grand prix award for the brand that has done the most to promote 'green' or 'environmentally friendly' sees a repeat performance on last year: Pick n Pay wins, followed by Woolworths and Nedbank close behind in third place*

Erica Webster

Managing executive at TNS Research Surveys Karin du Chenne believes Pick n Pay's success comes from its consistent messaging. "While positioning themselves as championing the cause of the consumer, the environment is also a cause they really embrace. They create awareness of the need to sustain our world through recycling, energy saving and tree-planting initiatives. Their iconic green bag is a tangible way of linking the company with green issues.

But to what extent does being green influence the buying decisions of the South African public?

According to Andy Rice, chairman of Yellowwood Future Architects, interest in sustainability and environmental issues is more than just a passing fad. "It definitely is a driver of choice, but only a significant driver of choice when all other performance factors are met. The absolute challenge for marketers is to say: I can do everything that you want functionally, and I'm green as well – that's the seduction message."

Rice recalls about decade ago when Reckitt and Colman were pioneering environmentally friendly household products, but were unable to deliver a product that was as good as its non-green competitors, some of which were also green. "The consumer wasn't prepared to make that sacrifice – it was a trade-off too far," he says.

Justin Smith, good business journey manager at Woolworths, says there is a growing awareness in the company's customer base about products – where they come from, how they're produced and their contribution to job creation and



Woolworths' Farming for the Future campaign promotes proper management of our water resources

community development.

He says the company tries to integrate environmental and social attributes into its core product messaging. A recent initiative is Woolworths' Farming for the Future campaign. "Pesticides, fertilisers and chemicals are being used far too extensively in agriculture in SA and it's affecting soil health, crop production and water in particular," says Smith.

"Being a water-scarce country, we need to manage our water resources a lot

more carefully and improve waste water management as well. A lot of the work we're doing from an agricultural perspective is focused on those areas."

Greg Garden, group brand executive at Nedbank, says while not everybody sees being green as a compelling reason to buy a company's products or services, it has unquestionably enhanced Nedbank's reputation as a brand, bank and company.

He says Nedbank's Green Affinity programme, which celebrates its 20th

anniversary this year, has been a key driver in the bank's image as an environmentally friendly company.

Nedbank is involved in a wide range of environmental initiatives, and is the only bank in SA that is a signatory to the Equator Principals and is one of 25 banks worldwide and three companies with primary listings in SA to be included on the Dow Jones Sustainability Index. It recently became the first bank and listed company in SA to acquire carbon neutral status.

P26: Bringing it home

AA31/13

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26

Sunday Times  
TOP BRANDS

Bringing it Home

# Local brands are lekker

Many of SA's brands are homegrown – locally generated by a local company. For many that's the main characteristic they use to define themselves ... and often with excellent results

Erica Webster

The recent World Cup is a case in point where, says Jeremy Maggs, editor of Marketing Journal, many homegrown brands capitalised more on the World Cup than brands that were official sponsors of the tournament. And at a cheaper price.

He cites the example of Kulula, whose ambush marketing may have got it into a spot of bother with FIFA for stating it was “the unofficial carrier of the you know what”. But Maggs believes that by pushing the envelope and not taking themselves too seriously, they came out a lot stronger.

“It is brands like Kulula, Nando's and Castle that capitalised on the spirit of the World Cup, that truly succeeded in getting people to engage with them,” he says.

Andy Rice, chairman, of Yellowwood Future Architects, believes that the most interesting homegrown brands are those that also differ from the international norm, brands that are not just local, but that are pioneering as well.

“In that respect Nando's is a brand that has done fantastic things globally; there aren't many people in other countries who realise that it's a South African brand. Kulula too has done an excellent job in creating a clearly South African personality,” he says.

Homegrown humour is the common denominator between these two brands, but humour does not always work, says Rice.

“If a brand can genuinely and with authenticity, and not with forced style,

adopt a platform which is fundamentally humorous, then it has a good chance. Unfortunately, too many people think South African humour is about having some voice-over artist try to do a ‘dof oke from Welkom’. Humour has to be in the DNA of the brand and not just the communication. That's where Kulula and Nando's have done so well with their whole proposition.”

Keeping the message simple can work too, however, if Koo brands are anything to go by. Zin Mabaso, managing executive groceries at Tiger Brands, says because Koo is so deeply entrenched in South African households it does not try to be anything but a partner in the household.

“The brand has kept its simplicity since its launch in 1940. Even when we've innovated, like the recently launched Koo flavoured tomato pastes, we've maintained the brand's authenticity. We respond to consumers' needs without trying to be too clever.

“We've used media which is quite personal and intimate and in line with the brand's nurturing positioning. Radio is one of our key vehicles of communication for our total market and is delivered in all the South African languages. We've also carried that through into our billboards where we try to use all the languages that are part of South African culture.”

She says although the brand has moved with the times, it has kept its core message. “We keep it modern without having to change the values. For some of the products, like Koo baked beans, the recipe hasn't changed because there hasn't been a need to change it – it's a



Nqobile Mthethwa, 9, and Siphamandla Gwala, 13, at Illovo Beach on KZN's South Coast

brand people know and trust.”

Koo came up trumps in the Top Brands tinned food category, beating the others on all fronts – usage, user brand ratings and non-user brand

ratings. In second place is Lucky Star with All Gold trailing by a reasonably large margin in third place. Koo also nabbed second place in the grand prix for overall favourite brand.

P27: Dominant players



## THE NEW kid on the block is GROWING FAST!

**Caltex** has recently introduced a new convenience format to convert its existing Starmart stores to **Freshstop** stores. As one of the fresh faces in the forecourt convenience market, Freshstop at Caltex is fast making a name for itself as an innovative industry leader.

With funky and fun new in-store departments, fresh and modern décor, and more than 22 stores that have already opened their doors, you can expect to hear a lot more about us in the future. We hope to see you soon!



CALTEX

FRESH  
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Dominant Players

# Beer battles hotting up

The South African “beer wars” are intensifying, as Brandhouse snipes away at South African Breweries’ lion’s share

David Jackson

Recently-released statistics indicate that Brandhouse has gained a further 2.6% share of the total South African beer market, bringing its market share to 12.8%. SAB’s is put at 87%.

The gain in market share was achieved via Brandhouse’s substantial growth in its beer volume sales of 36.7% across Heineken, Amstel and Windhoek, according to the latest Nielsen National Off-Con data. These figures are for the three months ending June 2010.

And according to this year’s Top Brands survey findings, Carling Black Label (in the SAB stable) remains number one. But this year sees the rise of Amstel (now in the Brandhouse portfolio) to second place (from fifth) which is driven by its much improved non-user ratings. In third place is Castle Lager (SAB), up from fourth last year.

Robyn Chalmers, SAB head: media and communications, says SAB welcomes increased competition in the industry “as it results in greater choice, innovation, higher quality and lower prices for consumers. We believe in challenging our competitors fairly and with the kind of passion and honesty that has characterised SAB since its foundation 115 years ago. We are committed to playing hard but fair and always ensuring that consumers and retailers are well informed about their choices.”

She says SAB had significantly increased its marketing support for its four ‘power brands’ – Carling Black Label, Hansa Pilsner, Castle Lager and Castle Lite.

Jeremy Sampson, executive chairman of the Interbrand Sampson group, pointed out that SAB in beer terms is among the world’s top three beer producers by volume. “They regard South Africa as their turf, and Castle as the brand of South Africa. Carling has come through to the top, arguably matching the demographics of SA. The city slickers might be knocking back their Peronis or their designer beers, but this segment represents a very small percentage of the market.”

Brandhouse’s successful growth has not only shown itself in the beer market; it is now the second-largest alcohol beverage company in South Africa by value share, according to Nielsen.

Brandhouse is the result of a joint venture between three regional and international alcohol beverage companies – Diageo plc, Heineken International N.V and Namibia Breweries Ltd – and began trading in the South African market in July 2004.

It has a portfolio of premium brands in the beer, RTD, white and brown spirits categories. Top brands include Amstel Lager, Windhoek, Heineken, Johnnie Walker, J&B, Smirnoff, Bell’s, Foundry,

Strongbow, Guinness, Jose Cuervo, Tanqueray, Bertrams and Captain Morgan, among others.

Priscilla Singh, corporate and brand

our suppliers and customers; and the benchmark multinational Sedibeng brewery.”

Earlier this year, the new Sedibeng

returning the rights to the Amstel brand in South Africa to Heineken, and Heineken’s decision to repatriate Amstel into the Brandhouse portfolio.



PR manager at Brandhouse, says that Brandhouse’s promise to consumers is to offer them greater choice and access to brands. “Our aim is to bring genuine competition to the South African market. We pride ourselves on our innovative approach, and believe that the increased choice we bring to the market will benefit customers and consumers alike.

“We aim to be the top employer in South Africa by providing an exceptional work environment; rated the number one industry partner by

Brewery, south of Johannesburg, was officially opened, built at a total cost of R3.5-billion (€310-million).

Singh says the decision to construct a local brewery was taken following the international court ruling in early 2007

The brewery, constructed within budget and ahead of schedule, was the first to be built in South Africa in more than a decade.

P28: Food for thought

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KINGJAMES GROUP



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Sunday Times  
TOP BRANDS

Food for Thought

# Stars of fast-food fame

Once again, KFC has taken the lead in the fast-foods category – a winner by a long stretch. Trailing in second place is Nando's with Steers following hot on its heels and closing in rapidly



Erica Webster

**K**FC, which snatched third place in the grand prix for overall favourite brand, is in a league of its own in the fast-foods space and remains an aspirational brand for non-users.

But how can a brand that enjoys 100% awareness top itself? Says David Timm, chief marketing officer of Yum Restaurants International Africa, owners and operators of KFC, it's one thing to have great awareness, but another to be top of mind. "One of the mechanisms for becoming top of mind is relevance, firstly with respect to product positioning and

connecting with consumers. Secondly we're looking to take our brand into a space that is value driven and that delivers a positive message – relevance here is created through our Add Hope hunger relief initiative and our involvement in supplier arrangements and sponsorships – the Proteas, Cricket SA and KFC Mini Cricket."

He says while awareness and penetration has remained strong during the recession, there is a portion of the lower LSM grouping who struggle to afford KFC. "We've tried to cater for them by making sure we have very strong products and our communication is focused around value. We've put more

emphasis on our Streetwise brand as a result of market conditions."

KFC is innovating and exploring continually. Innovation is key, says Timm, because it keeps the brand fresh and relevant and because consumer choice and demands are changing constantly. "While there is still a huge demand for the traditional products that we've had for years, there are changes in the marketplace and some people want healthier alternatives. We feel that we should be providing that choice."

KFC's SA market has a strong innovation department, but it also looks to other markets for inspiration to see what has worked well and gained

consumer acceptance. "What sets us apart from a lot of markets around the world is that we appeal to such a diverse group of people and have strong, loyal consumers in practically every LSM grouping. That's an amazing achievement for the brand."

Nando's user ratings have dropped off slightly since last year while Steers' ratings have increased. Despite Nando's having a slight edge in terms of usership, perceptually Steers is in a marginally better position.

Nando's marketing director, Quinton Cronje, says the brand is known for being irreverent, cheeky, unpredictable and brave. "We try to seize unconventional opportunities and take a different look at stories and events around us. I think that South Africans enjoy this – they like to laugh at themselves and they like to laugh at their imperfections.

"But at the end of the day – we're all about chicken. We believe we make the best and tastiest chicken in the world, and our focus will always be on ensuring that our customers continue to experience this."



P30: Customer loyalty

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Customer Loyalty

# Survival strategies

*Recession can jeopardise marketing budgets allocated to iconic brands, often depending on the brand's prior performance and the profits the brand is required to generate*

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Thank you for lifting us to new heights this year.

Andrew Gillingham

Hilton Lawler, founder of Hilton Lawler Strategy Consultants, says that even a top brand could have its budget cut if it was not performing as well as expected.

By reducing marketing expenditure companies can retain margins and, therefore, profitability. "There is a danger of even an iconic brand losing its status in the market. However, recessions are usually short-lived and a top brand can usually retain consumer top-of-mind status for as long as six months," Lawler says, adding that top brands have a lot of brand equity built up over years and consumers remain loyal for a period of time even when the brand's advertising profile is reduced.

In addition, products in the fast-moving consumer goods category are being used all the time and many of them are necessities, particularly those in the household cleaning category.

An iconic brand's ability to sustain its market presence is easy to understand when it is considered that iconic brands are not simply products that have been



Hilton Lawler

well packaged and marketed. Instead, a key to an uber brand's success is that it consistently delivers on its promise. In addition, much of a brand's success depends on the manner in which it is able to influence and intertwine itself in people's lives, thereby increasing the "touch points" for the brand.

For example, an effective competitor in the household cleaning category reduces the time people need to spend cleaning, thus giving them more time for other things around the house, becoming an extension of being house proud.

Neil Higgs, director: innovation and development at TNS Research Surveys, says that achieving iconic brand status requires consistency in terms of positioning a brand in the market.

"An iconic brand does not suffer from consumer confusion. In addition, brands that have been active in South Africa for decades also tend to benefit from brand memory that is handed down from one generation to another. However, this only works because such brands are consistent in their positioning," Higgs says.

P31: Best foot forward



# Playing by the rules

*A loophole in the official agreement relating to the wearing of football attire in the 2010 FIFA World Cup apparently enabled brand icon Nike to steal a march on one of its closest competitors, from the very first goal scored in the tournament – even though Nike was not a designated World Cup partner and the competitor was*

David Jackson

The very first goal of the 2010 tournament, scored by hosts South Africa against Mexico, was scored by a player wearing a Nike boot, even though rivals Adidas were the official World Cup partner and Bafana Bafana were kitted out in their clothing – boots apart in some cases.

South African goal-scoring hero Simphiwe Tshabalala was wearing Adidas gear, but the boot was the product of Nike.

Sean McCoy, chief executive of strategic brand consultancy HKLM, says the commercial agreement allows a specific brand to sponsor the team, with the exception of the boot. “You can’t insist on a brand on the player’s boot but you can equip them with the sponsored kit for the rest of the attire. The boot is the anomaly in the commercial agreement, which Nike has clearly made full use of.”

Nike is exceptionally high up in the awareness stakes with 98% awareness, pipping Adidas on 97%, says Debbie Booth, client service business manager for TNS Research Surveys: “The differentiating factor with these two brands are the brand ratings. The users love Nike and the brand has a great deal of aspirational value with non-users – it has got a lot of brand clout. Players want to wear the brand and to represent it, whereas Addidas does not quite have that footing in the market.”

Adds Gaby de Abreu, creative director: the Switch Group: “Even though non-affiliate brands were equally dictated to by FIFA, we saw many peripheral brands successfully leverage



PUTTING IN THE BOOT: Nike featured prominently in the Fifa 2010 World Cup.

the World Cup (possibly more effectively than official brands in some cases) without infringing on the branding rules and regulations.”

In most of these scenarios, we saw these brands leveraging ‘football’ as opposed to just the World Cup. The most interesting response to non-affiliated branding, he believes, came in the form of Puma taking ‘ownership’ of football in Africa. “In reflecting on Puma’s campaign, one sees just how far back it

was conceptualised and implemented – and how cleverly it was done,” says De Abreu. “Puma’s approach to the World Cup was to ‘adopt’ the continent – and football in the continent. It invested heavily in positioning its brand in countries like Ghana that would be representing the continent at the event.

“By sponsoring soccer clinics in these countries, aligning the brand with leading national players and designing the national squad’s kit, Puma created a

space where it was uniquely associated with the best of African football.”

Despite not being an official sponsor of the 2010 FIFA World Cup, Puma thus managed to leverage the imaginative space of both football and Africa to support the emergence of new and exciting markets on the continent.

Puma, says De Abreu, has arguably emerged as the winning World Cup brand – owning the conceptual space of post-2010 Africa.

P32: Targeted communication



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Sunday Times  
TOP BRANDS

Targeted Communication

# Knowing your market is key

*First for Women is South Africa's most-favoured consumer short-term insurance brand, followed by ABSA Insurance and then OUTsurance*

Andrew Gillingham

In the business insurance category it is OUTsurance that managed to take top honours with Santam and Mutual & Federal taking second and third places respectively.

Business OUTsurance has been active in the market for seven years and as such it is a relative newcomer to the business insurance market.

Peter Cronje, head of marketing at OUTsurance, says that the company is the only player of significant size that offers business insurance directly to its clients. "Unlike personal insurance, almost all commercial insurance is still offered through intermediary/broker channels," Cronje says, adding that in some industries brokers add value because they are able to provide specialist advice.

However, Cronje does not see that as an impediment to Business OUTsurance as its consultants are able to provide similar expertise. In addition, business cover is becoming increasingly generic. Thus, while brokers catering to specific market segments may package solutions for their particular client bases, essentially these packages are made up of covers common to the business market as a whole.

He says that while the company does not limit itself in terms of the clients it addresses, it does not target the very large industrial risks that have extremely complex insurance needs and where the multibillion-rand risks are often underwritten by offshore insurers.

Business OUTsurance has enjoyed particular success in the small and medium end of the market. "Small and medium businesses are often run by entrepreneurs and owners that are used to taking control. They place a high priority on their cash flow and they are prepared to explore what Business OUTsurance offers," Cronje says.

Robyn Farrell, MD of First for Women Insurance Brokers, says that when it comes to marketing and building a female-focused short-term insurance brand, there are a number of elements to keep in mind.

At the top of the list is the fact that successful marketing to women can yield higher returns than marketing to men. She says women are more inclined to form long-term brand relationships and enhanced loyalty means that every marketing rand invested in female customer acquisition results in a higher retention rate.

Furthermore, word-of-mouth is more prevalent among women. "In essence, what women buy, women sell, however, the reverse also holds true," Farrell says, adding that women resonate with messages focused on similarities, affiliation and win-win mutuality. "As a result, they do not respond as well to messages based on gloating, boasting, or bragging."

In addition, Farrell says that a woman's sense of humour is different from a man's. "Women like to identify with the person in the situation and have 'Oh, my goodness, your husband does that too' or 'that's exactly like me'

moments. They like advertisements with which they can identify," Farrell says.

She notes that there are many other keys to marketing successfully to women and marketers need to recognise the subtle differences in women's buying styles and create advertising and sales strategies that appeal to women.

Tlalane Ntuli, brand manager, marketing and development at Glenrand MIB, says that while the company has a

across many of the offerings to customers. "It takes brand characterisation that delivers a powerful promise, backed by real customer benefits to distinguish a company in this space. Therefore, it was important to produce campaigns that showcase the benefits of the Glenrand MIB promise in an engaging, intriguing and relevant manner in what is still essentially a grudge purchase even in today's market.



particularly strong presence in the commercial and business sector, the company has placed fresh emphasis on its consumer base in recent years.

However, creating a differentiated position in this market is no easy feat given that it is highly regulated, resulting increasingly in product parity

"Accordingly, our campaign is based on the premise of the years of devoted practice, honing and craftsmanship that it takes to create something exceptional, the central 'linkage' being that Glenrand MIB delivers something exceptional in terms of short-term insurance products and services," Ntuli says.

P33: Preparation plus opportunity

The game of chess requires strategic and logical thinking. To become a master, true passion is needed.

## Through our passion, we have become the masters of our own game.

This year has been a year of great success for the Glenrand M•I•B brand. We were recently **nominated within the Top 10 short-term insurance brands in the Sunday Times Top Brands Survey.**

This is in addition to our other achievements which include, our 7th place ranking in the Financial Mail's Top 200 Listed Empowerment Companies Survey for 2010. As well as our ranking in the 41 top performing companies in the South African Women in Leadership Census conducted by the Businesswomen's Association. Now that's what you would expect from a master of the game.

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# Brand building - science or luck?

*Are brands born, or are they made? Is it nature or nurture? Is brand building an art or a science? Perhaps the answer lies in ‘planned happenstance’*

Rudi Kruger

No doubt if I opened up these questions to the branding fraternity on the [www.brandrelevance.co.za](http://www.brandrelevance.co.za) blog, they would be debated ad nauseum.

Recently I had the pleasure of meeting Nassim Taleb, author of two bestselling books that pre-empted the recent financial markets meltdown, *Fooled by Randomness* and *The Black Swan*.

Taleb is guided by the courage of his convictions. He does not beat about the bush when it comes to calling out the pretenders; while many of the so-called ‘experts’ were simply wrong, many others were merely the beneficiaries of dumb luck or the roll of the dice.

I believe in luck. I have been the beneficiary of ongoing luck of a different kind. Seneca said luck is what happens when preparation meets opportunity. Louis Pasteur said that luck favours the prepared.

My company once hired a behavioural psychologist to help us see how to make our own luck through ‘planned happenstance’. Pasteur was right, disciplined action is always better than relying on haphazard creation.

I am going to assert that brands are made and that brand building is based on scientific principles that are best applied by very experienced practitioners in times of receptive demand (luck).

One has to acknowledge the role of experience. In his book, *The Art of What Works*, William Duggan wrote about how success really happens; how brands are built, just as wars are fought in a “fog of uncertainty”.

Carl von Clausewitz wrote in his book *On War*, published in 1832, that all action must be planned in a twilight. The army general (experienced branding practitioner) must enter the fog with a “presence of mind”, expecting the unexpected. In an instant he/she must be able to cut through the fog in a flash of insight. The rapid discovery of the truth (market segmentation) is followed by resolution or disciplined action (go-to-market activities). This is the science of branding.

The Top Brands Survey measures brand relationship scores. The measure of any brand’s worth is its ability to sustain sales from loyal customers. To get there, a brand first needs to establish itself in the mind of the customer (awareness phase) and then has to build favourable attitudes (attitudinal phase). Finally, positive attitudes should lead to favourable purchase behaviour. For this reason, the brand relationship score is based on measuring spontaneous

awareness, trust, confidence and loyalty to a particular brand.

The above-listed criteria break down into a wide array of measures and action

elements that we can simply refer to as “brand clout”. The science of branding is about control and enhancement of these attributions. This is the disciplined

action or the preparation part of ‘planned happenstance’.

*(Rudi Kruger is a branding strategist and the CEO of Espial Branding & Design)*

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Sunday Times  
TOP BRANDS

Sharp Focus

# Building relationships

*Niche marketing is about finding a solution for a specific segment of the market, whether large or small*

Erica Webster

“One can find some extraordinary niches if need be,” says Andy Rice, chairman of Yellowwood Future Architects. “Each application of a filter knocks more and more people out of the market, so if you apply enough filters, you can be left with a really small niche.”

“The youth market is particularly lucrative, because any brand that follows people through the stages in their life

will have different niches as they go along. Banks do that – they have programmes aimed at being the first bank where the child will open an account, knowing that they tend to stay with that bank for life. And then they have campaigns aimed at students and campaigns aimed at young adults in their first jobs. Each of those, by definition, is a niche.”

Apple Mac, which has beaten its competitors in the business sector to the number one position, has created a great

perception about a niche brand with relatively small usership, says Debbie Booth, TNS Research Surveys business manager.

“Apple’s win is driven by stronger brand ratings among both its users and non-users. There is a lot of clout around the brand, particularly from a non-user point of view. And it resonates with a lot of people – it’s a brand they want to be seen and involved with.” Booth reckons that with the tech boom, a brand of this nature is poised for growth.

Targeting a relatively broad niche is 1st for Women, which took top position in the short-term insurance category, followed in second place by ABSA Insurance and in third place by last year’s winner, Outsurance.

The company’s MD, Robyn Farrell, says 1st for Women’s quarterly lifestyle networking events, which give like-minded women the opportunity to meet, network, talk and grow and learn, have become something of an institution.

“Both our below-the-line and above-the-line strategies have worked well for the business. In order to successfully market this product to women, we needed to recognise the subtle, yet very important differences in women’s buying styles and create advertising and sales strategies that appeal to women. Our tongue-in-cheek TV adverts that demonstrate why we insure women only, have proven to be the most effective.

“Author Deborah Tannen once said that men want to transact while women want to establish a relationship. This philosophy has moulded us into the brand we are today – a lifestyle support solution rather than a generic insurance product in pink packaging.”

She says the main challenges in entering this market were clearing the clutter in financial services marketing,



Robyn Farrell

processes and approaches tailored to the needs and expectations of the people who historically bought and sold most financial products and services – men.

“Because women are a lower insurance risk, we were able to offer lower insurance premiums. Statistics suggest that women take fewer risks,

*Men want to transact while women want to establish a relationship. This philosophy has moulded us into the brand we are today – a lifestyle support solution*

breaking down stereotypes concerning women drivers and making insurance, which has traditionally been staid and conservative, sexy. “Until our establishment, the majority of financial services companies still used sales

make more careful decisions, usually stick to the speed limit and frown upon road rage. In addition, the cost of repairs to vehicles crashed by women is, on average, lower than the cost of damage caused by men.”

P35: Tomorrow's transport

**KNOCK OUT BLACKOUTS**

Although there are a number of reasons for power failures (such as short circuits, lightning, load shedding, vandalism, etc.), the current problems are mainly caused by the demand for electricity outstripping the supply. Whatever the reasons may be, one fact is indisputable: power failures cost money and could cost you your business and your life. Power backup installation in your business is an added value and a distinct real asset.

**Scenarios:**  
In the (unfortunately all too likely) event of a power failure or load shedding, you may be faced with any or all of the following problems:

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# Carbon-free aspirations

*Cars were probably the Top Brands category most influenced by the economic recession, as evidenced by the decline in new motor vehicle sales during the toughest times*

David Jackson

And in an era in which carbon footprints and fuel efficiency are increasingly becoming factors for environmentally and price-conscious consumers, BMW took this year's top spot with Toyota close on their heels in second place and Volkswagen third.

Sean McCoy, chief executive of strategic brand consultancy HKLM, says Toyota's performance highlights its "resilience and tenacity in the face of recent challenges and pains. It shows what brand value can do in the long term in bringing an element of forgiveness on the part of consumers. BMW's performance is not surprising ... it remains great quality engineering, while being a very aspirational brand."

Debbie Booth, business manager: client services for TNS Research

Surveys, says the difference between second-placed Toyota and third-placed Volkswagen was minimal.

The overall score is based on a number of variables, the first being usership – how many people are using the brand – secondly on how many people are familiar enough with a brand to rate it, and thirdly, how users rate their brand experience and non-users rate the brand perceptually .

According to S'bu Manqele, business director of the Switch Group: "Cars are ushering in a new green era, where statements are going to be made about driving cars with less carbon emissions, for example.

"Pricing will sort itself out because there are more cars on the roads now than 10 years ago. This could create a debate about why, if there are so many cars on the road, they cost so much.



Sean McCoy

"And because South Africa has truly become a global brand, we are beginning to make comparisons with prices in other countries. People who would have bought either a German or Japanese brand are driving the equivalent of that in a Korean car, because there is a growing belief that the Koreans have sorted out their issues around quality and reliability. Their cars are priced better and the Koreans continue to look after their clients after they have bought the vehicle."

Manqele added that with the effects of climate change felt around the world, "South Africans are saying that maybe we need to be looking at cars differently. The latest advertisements from Mercedes-Benz, for example, are not about how the car performs, but about their commitment in developing cars that are friendly to people, and safe."

P35: Fierce competition

2010 Sunday Times  
Top Brands Survey

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Sheer  
Driving Pleasure



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Less emissions. More driving pleasure.





# It's not only about price

*Recession makes consumers more price sensitive and prudence in tough times takes them to those brands that have proved they offer consistent value and which keep their brand promises through good and bad times*

Andrew Gillingham

Regardless of economic conditions, people still need to buy food and groceries, making them very conscious of the stores that win their favour.

In the Top Brands convenience and grocery store category Shoprite won first place in consumer hearts, followed by Pick n Pay and then Spar.

Neil Schreuder, marketing director of Shoprite Checkers, says that Shoprite's brand message is "Lower Prices you can trust, Always".

"Shoprite serves the mass middle market, predominantly LSMs 4-7, and now has more consumers than any other supermarket brand with 16 million individuals who frequent Shoprite stores. Price is critically important to this core market since food makes up a



THE JOURNAL in association with **Sunday Times Top Brands** and **TNS Research Surveys** presents the

TOP BRANDS Mega Forum

Based on the success of our breakfast debates, **THE JOURNAL**, in association with Sunday Times and TNS Research Surveys are hosting the annual **Top Brands Mega Forum**. The Forum give attendees the opportunity to find out what these winning brands have done over the years to achieve their success. It won't just be a glory trip, as in true form, the Chair – Jeremy Maggs, has asked a panel of leading brand practitioners to dig a little deeper into the DNA of these specific brands.

<p><b>HOW WILL IT WORK?</b></p> <p>5 brand category winners will present their success stories at the Mega Forum. They will then be quizzed by our panel of industry experts.</p>	<p><b>Dates:</b> Thursday, 16 September 2010</p> <p><b>Venue:</b> Michelangelo Hotel, Sandton</p> <p><b>Times:</b> 07h45 to 11h00 (06h45 buffet breakfast)</p> <p><b>Cost:</b> R495 for subscribers to THE JOURNAL; R595 for non-subscribers; ex VAT</p>
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significantly larger proportion of their disposable income than that of more affluent consumers and the cost of food directly impacts on the quality of their daily lives. Therefore, Shoprite needs to be relentlessly competitive on price," Schreuder says.

Shoprite's corporate philosophy is built on continuously looking for ways to do business more cost efficiently, resulting in savings for consumers and delivering on the promise of everyday low prices rather than a quick price gimmick. "The tone in which we communicate becomes more rational as the tougher realities consumers are experiencing are taken into account. Empathising means showing customers how to save money in your store by shopping smartly," Schreuder says.

He says that as tougher economic times hit, marketing becomes more important. Price consciousness becomes fashionable, so as shoppers become informed, advertising messages are amplified in the void left by other brands slashing marketing spend.

"We sell the satisfaction of basic needs, so when communicating to customers we need to ensure it is relevant in three ways: to their head (rationally), to their heart (emotionally) and to their pocket (financially)," Schreuder says.

Malcolm Mycroft, GM: marketing at Pick n Pay, said that the new Pick n Pay brand heralded an evolutionary change, which, while quite different from the original, retains the key features that have made Pick n Pay distinctive in the retail environment.

"The rebranding exercise was no cosmetic facelift but rather an important signal of the deeper underlying transformation, change and revitalisation that the business was, and

still is, undergoing. Importantly, it is all about the customer and about turning insight into customer needs into action responses to those needs," Mycroft says.

He adds that the rebranding process gave Pick n Pay an opportunity to refresh, revitalise and re-energise the business, and most importantly to refresh the customer shopping experience on the shop floor.

Mycroft says that during recessionary times when consumers are more cash-strapped the supermarket giant increases the emphasis on its value messaging. "Experience has shown that this resonates exceptionally well with consumers. Since its inception, Pick n Pay has fought for the best possible deals and for its customers and this has not changed. We emphasise this fact more during recessionary times as it serves as a reminder to our valued customers that we really do offer the best value for money," Mycroft says, adding that the message must resonate with consumers.

In terms of Pick n Pay's new customer strategy, this lies at the heart of the entire rebranding exercise. "The new tagline clearly articulates this in that it points to the fact that everything we are doing – the changes we are making across the business – are all "Inspired by You" – the customer.

"Some of the changes that demonstrate what we have been inspired to do include our new and upgraded stores, improved fresh offering, new product ranges, and private label repackaging aligned around a clear 'good, better, best' positioning.

"We have also invested in a new supply chain which helps ensure fresher, quality products as well as better stock availability as well as rolling out Pick n Pay stores into areas not previously served," Mycroft says.



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Sunday Times  
TOP BRANDS

Faithful Friends

# Things go better with ...

South Africa's top three favourite brands are Coca-Cola, Koo and KFC – voted by metropolitan consumers

David Jackson

The “grand prix of all grand prix” for the overall favourite brand goes to Coca-Cola, for the second year in a row. Second place is Koo, up from third, while KFC comes in third.

Coke also won the Grand Prix award for the brand that has done most to uplift communities, moving Pick n Pay down two places to third position, with Vodacom in second place (up from third last year).

The award for the brand that has done most to promote ‘green’ or ‘environmentally friendly’ initiatives, in the eyes of metropolitan South Africa, has again been



scooped by the top three finishers from last year. Pick n Pay first, Woolworths in second place and Nedbank in third.

Says Debbie Booth, business manager: client services for TNS Research Surveys: “The emotional connect that people have with brands is far stronger than any functional delivery or benefit. And probably the most difficult part about understanding consumers is assessing how strong that connection is – and how you leverage it. It’s all about connecting emotively with brands.”

“Brands that have done this very successfully include Coke, Koo and KFC. Koo is a truly South African brand. KFC is an international brand, although many people perceive it to be a local brand and connect very strongly with it.”

Other household names among South Africa’s top 10 “favourites” this year included brands like Shoprite and Handy Andy. Local brand Carling Black Label won in the alcohol (fast-moving consumer goods) category, having surged in popularity during the 2010 World Cup.

Gaby de Abreu, creative director of the Switch Group, believes that Coca-Cola successfully leveraged its sponsorship to reinforce global consciousness about the brand and its products. “At a global level, Coca-Cola became the non-alcoholic drink of choice associated with the World Cup – translating directly into bottom-line sales. Not only did all advertising, roadshows and the brand’s Wave your Flag song culminate in the drinking of a bottle of Coca-Cola, but FIFA’s retail restrictions inside stadiums created a captive market for the product during matches.

“The ‘Coca-Cola experience’ thus became an essential part of the World Cup experience.” In this way, Coca-Cola’s association with the 2010 FIFA World Cup also served to re-enforce market knowledge about its brand and exposed consumers to its products.

Jeremy Sampson, executive chairman of the Interbrand Sampson group, says that brands that perform consistently well have boards of directors who understand the importance of investing in, building and growing their brands, while being innovative and creative in the process. “You don’t turn it on and off like a tap. You have to keep investing in the brand. Major players may see the recession as a time of great challenge, but also one of even greater opportunity.

“They often have the deeper pockets, the more muscle and the ability to squeeze margins – as well as the competition – sometimes out of the game. Top brands also understand the importance of marketing, more so in recessionary times.”

Booth says the business-to-consumer survey results indicated that people were more susceptible to ‘recession regression’ than in the business-to-business sector, but that “strong brands remain strong and sometimes even stronger, where people tend to turn and return to brands they know and love in tough times.”



P39: Back to the basics

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Back to the Basics

# Best of the banks

Consumers put ABSA in first place when it comes to their favourite retail bank, with First National Bank (FNB) in second place and Standard Bank taking third



Andrew Gillingham

However, in the business banking arena it was Standard Bank that topped the polls with First National Bank in second and Nedbank third.

Neil Higgs, director: innovation and development at TNS Research Surveys, says that in terms of business banking Standard Bank has the highest market penetration and this works in the bank's favour. Niche bank Investec also did well from a user ratings perspective but its smaller market penetration kept it out of the top rankings.

The survey showed a shift when it came to consumer perceptions of their favoured retail banking brands. While FNB took first place last year from ABSA, this year ABSA managed to regain first place. "A surprise entrant into the retail bank rankings is Capitec which managed to take fifth place just behind Nedbank. Capitec's user scores are exceptional but the bank's smaller market presence counts against it in the survey as does its lack of profile amongst non-users," Higgs says.

Happy Ntshingila, chief marketing and communication executive at ABSA Group, says that the bank has over 1 000 points of presence around the country, a self-service network of over 8 100 ATMs and more than 36 000 employees to serve its customers across the country. "This infrastructure provides our more than 11 million customers with convenient access to financial services," he says.

At the same time, he says that the

challenge remains to make banking easier for ABSA's customers and to deliver a consistent customer experience across all the bank's channels.

"We introduce innovative offerings that address customers' needs, including CashSend, an offering that scooped the grand prize IFS Award for Outstanding Innovation as well as the Most Promising New Product in the 2009 Financial Innovation Awards and continue our customer service improvement drive to meet the challenge," Ntshingila says.

He says that the marketing strategy has continued to focus on delivering value to customers through offering innovative products and services.

Derek Carstens, brand director at FNB, said that the word "helpful" sums up the bank's brand promise. "We are all about helping our customers with a helpful attitude, products and services and we have stayed with this brand promise for the past 11 years.

"FNB is doing better in a commercial sense and we are seeing significant improvements in our market share.

"This is as a consequence of us staying with our brand promise, incrementally improving our message and consistently working to improve our ability to help our customers," Carstens says. By holding to a consistent brand promise FNB ensures that customers are very clear about the bank's stance.

Further, as a service brand, delivering on the brand promise rests on the shoulders of FNB's staff and brand promise continuity has helped employees keep that promise at the forefront of

their customer interactions. "Our staff really have internalised the 'helpful' culture," Carsten says.

Jenny Pheiffer, director: brand and integrated marketing South Africa at Standard Bank, said that Standard Bank's business banking message is focused on making the right connection for its clients, connecting them to the world of banking and the opportunities that banking can offer through the bank's relationship managers and the expertise they can provide to different businesses in different sectors.

"Standard Bank has a clear group strategy and vision. In support of this, we have a very clear brand strategy and brand positioning that is able to stretch from the smallest business to the largest corporation in South Africa and across the 33 geographical areas in which we are active," Pheiffer says.

She says that the key to success is bringing the brand promise and positioning to life so that it is relevant and engaging to all the bank's customers.

To achieve this objective, a key focus area of the business banking team has been building skills and managing talent, as well as physically decentralising the team to get closer to customers, and get a better feel for their customers' environments.

"We moved them out of the head offices and into the regions to get them to where customers operate. It is only through allowing them to spend time with their business customers that they are able to understand their customers' business and banking needs," she says.

## Quality is the answer

Brands such as Unilever's Sunlight, Omo, Rama, Vaseline Mrs. Balls, are iconic brands that deliver on the promise made

Andrew Gillingham

Gail Klintworth, CEO of Unilever South Africa, says that Sunlight offers high quality and good value, whether in a dishwashing liquid that cuts grease better than any other product with only a teaspoonful, or in a washing powder that offers excellent cleaning, softness and a wonderful fragrance. "In each case the consumer knows she will not be disappointed.

"If we take another example, Mrs. Balls chutney: South African consumers know that they are going to get the original recipe full of the best quality peaches and other fruit that will turn the braai or curry into a masterpiece," Klintworth says.

The company has been around for many years during which Unilever has listened to consumers, provided what they need, changed as their needs change, and offered the best quality.

Recession always puts companies under pressure but she said that cutting marketing budgets is a last resort.

In the current recession, where price and promotion have been strong drivers of keeping consumers in the brand, Unilever needed to invest differently.

In some cases there may have been less spend on epic advertising on television and more investment in some of the other elements that are right now more critical in the consumer's choice. "This must be managed with enormous care. It is a slippery slope to only rely on deep price cuts to drive volume, since keeping the core brand promise and the quality of the brand foremost in the consumers' minds is what ensures they will always choose us."

She adds that in-store presence has become more important over the years. "Despite owning the pre-eminent space in the consumer's mind, many decisions are made in store."

The best marketing in the world will not persuade savvy consumers to award poor quality products with iconic status.

She says that quality is a critical part of the marketing mix.

Unilever has a high-profile quality programme in the business that benchmarks its products against competitors in both blind and branded studies to ensure that it is most often the best in quality.

"We have also developed clear profiles of what quality means to consumers across the full spectrum of her experience with the product. Consumers buy iconic brands because they trust us and disappointment is not an option," she says.



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