

# BRANDS IN ***MOTION***

Australia



# BRANDS IN MOTION

AUSTRALIA



Category	Emotional	Rational
Computing Devices	38.8	40.2
Smart Home	26.6	26.5
Finance	17.0	31.6
Health and Wellness	23.9	27.9
Technology B2B	41.8	42.5
Healthcare B2B	21.0	25.3

Australia Adjusted Axis Points: 32 Rational, 28 Emotional based on average responses to category level drivers.



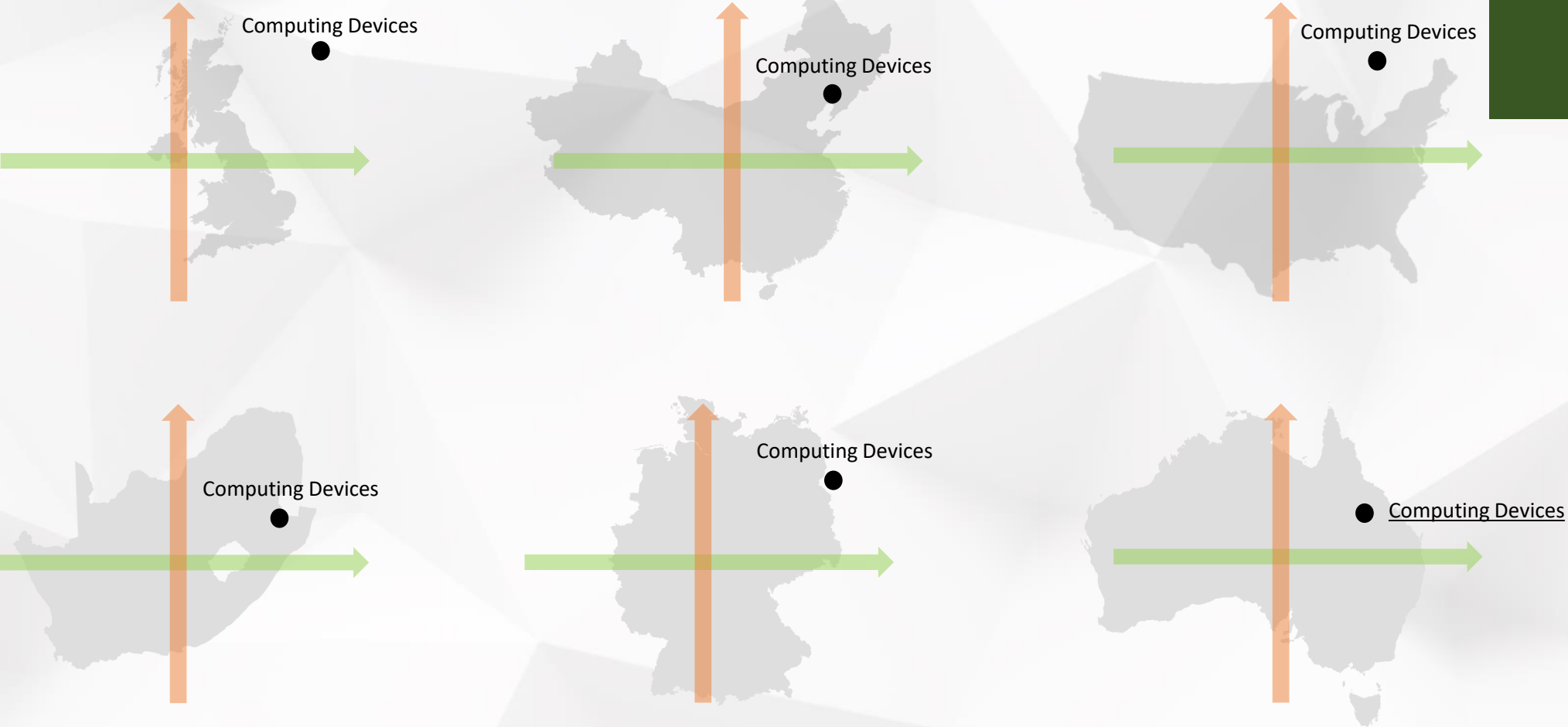
# COMPUTING DEVICES

## CATEGORY DEFINED

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



# MOVER ACROSS ALL MARKETS

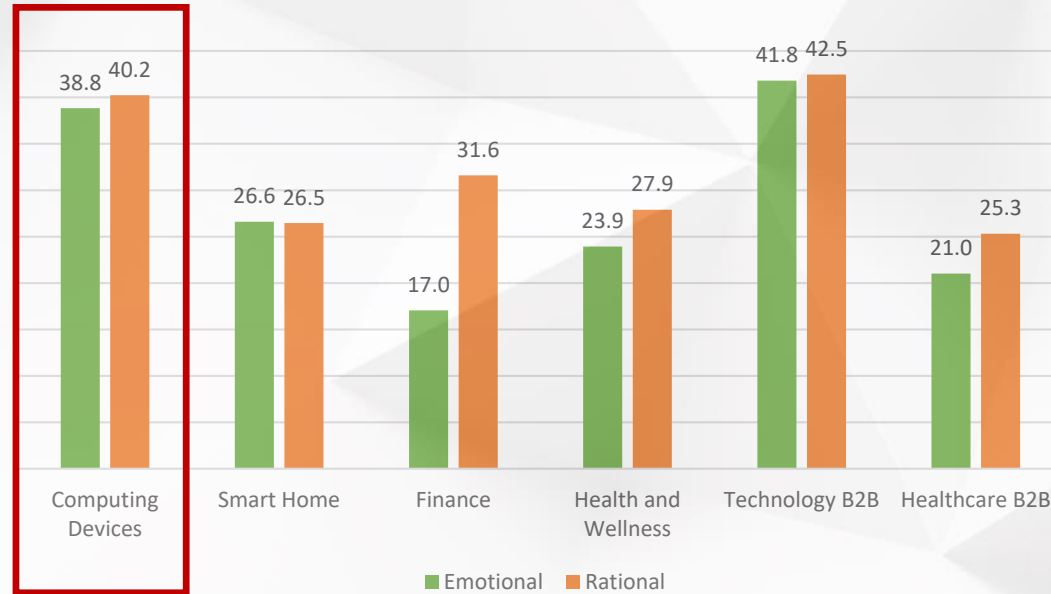


# COMPUTING DEVICES

## CATEGORY COMPARISON

### Observations:

- Category had an average emotional response of 38.8, which was the second highest average amongst categories surveyed.
- Category had an average rational response of 40.2, which was again the second highest average amongst categories surveyed.

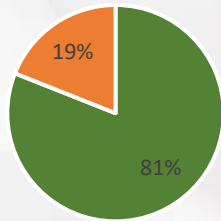


# COMPUTING DEVICES

## EMOTIONAL DRIVERS

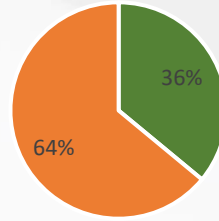


### Defend/Shame



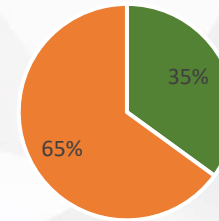
■ Join in the public shaming ■ Defend to the bitter end

### Experience



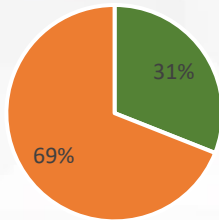
■ Completely miserable ■ It's a pleasure

### Disappeared



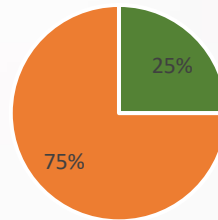
■ Good Riddance ■ I need it back!

### Love/Hate



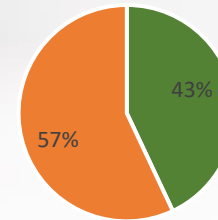
■ Hate them ■ Love them

### Overall Impression



■ It is the worst ever ■ It is amazing

### Social Impact



■ Does harm ■ Out for Common good

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

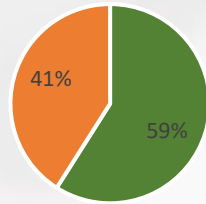


# COMPUTING DEVICES

## RATIONAL DRIVERS

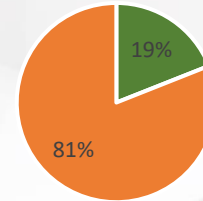


### Executive Behaviour



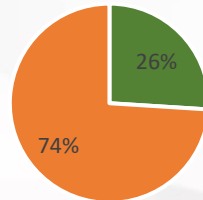
■ Strong influence ■ Not influence at all

### Innovation



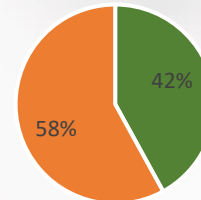
■ Stuck in the stone age ■ Cutting Edge

### Necessary



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

### Intent to Purchase



■ No way ■ Absolutely plan to purchase

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



# SMART HOME

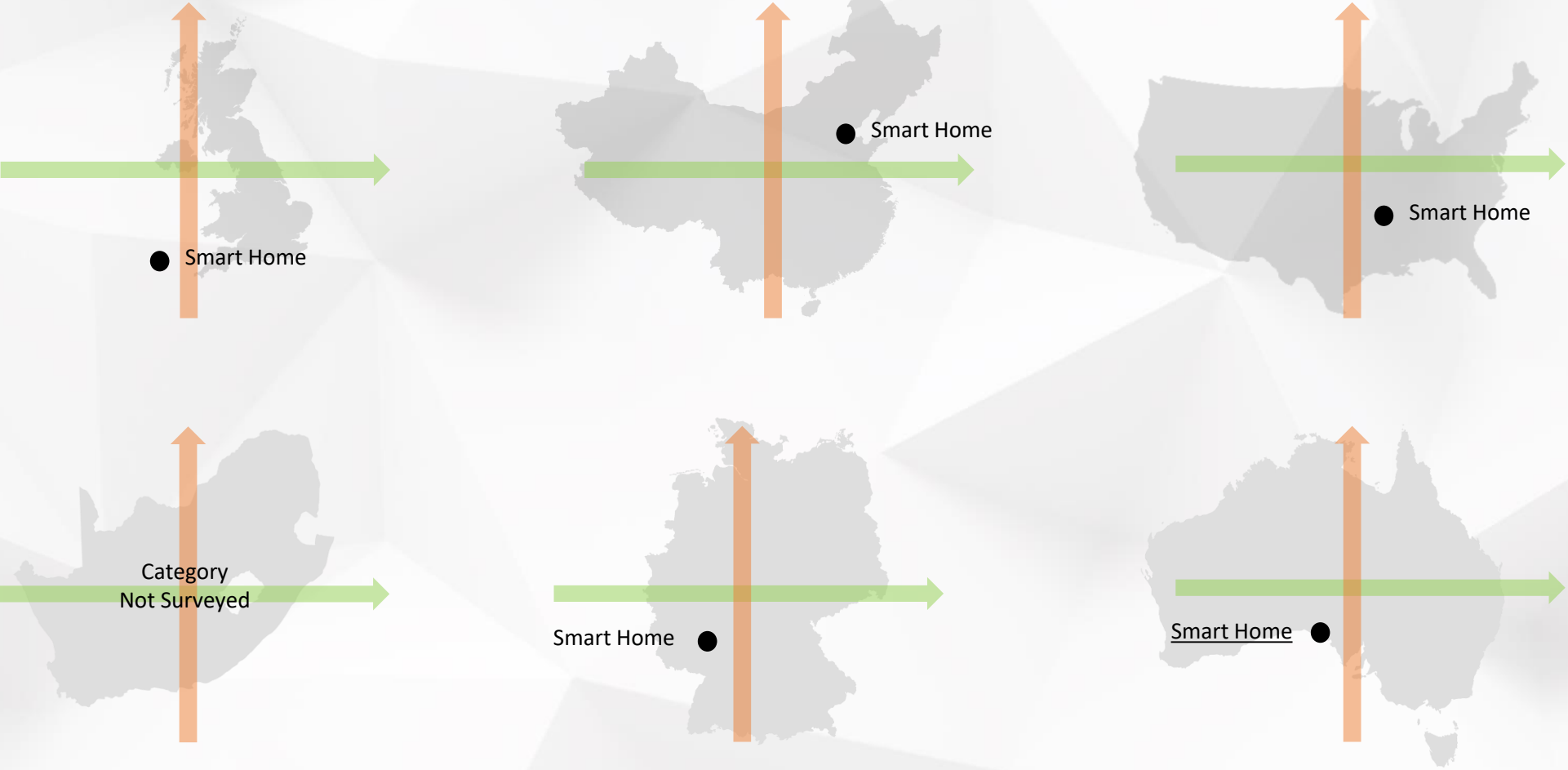
## CATEGORY DEFINED

**Smart Home:** Including devices and subscription related hubs, smart appliances (fitness, washer/dryer, baby monitors), smart entertainment (gaming, TVs), utility management (thermostats, light switches) and safety and security (security cameras, door and window locks)





# MOTION ACROSS ALL MARKETS



# AUSTRALIA

## CATEGORY COMPARISON

### Observations:

- Category had an average emotional response of 26.6, which was the third highest average amongst categories surveyed.
- Category had an average rational response of 26.5, which was only one point higher than the lowest category surveyed.

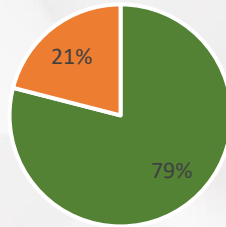


# SMART HOME



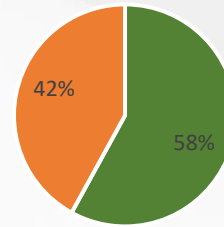
## EMOTIONAL DRIVERS

### Defend/Shame



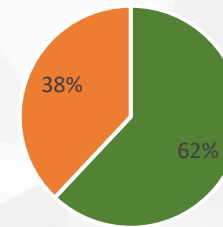
■ Join in the public shaming ■ Defend to the bitter end

### Experience



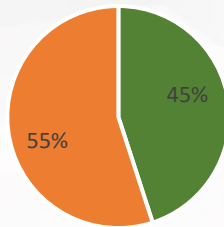
■ Completely miserable ■ It's a pleasure

### Disappeared



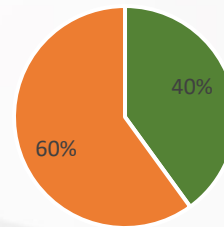
■ Good Riddance ■ I need it back!

### Love /Hate



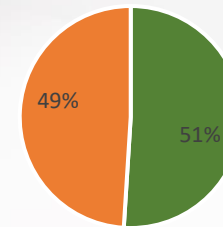
■ Hate them ■ Love them

### Overall Impression



■ It is the worst ever ■ It is amazing

### Social Impact



■ Does harm ■ Out for Common good

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

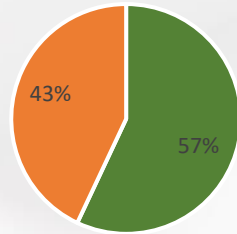


# SMART HOME



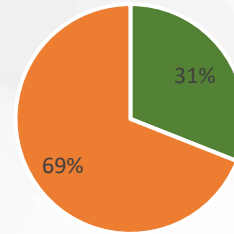
# RATIONAL DRIVERS

### Executive Behaviour



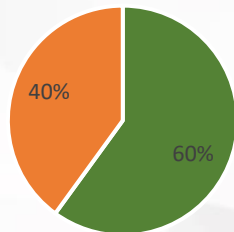
■ Strong influence ■ Not influence at all

### Innovation



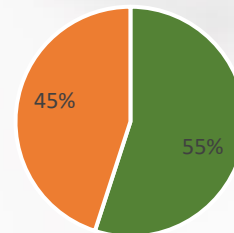
■ Stuck in the stone age ■ Cutting Edge

### Necessary



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

### Intent to Purchase



■ No way ■ Absolutely plan to purchase

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



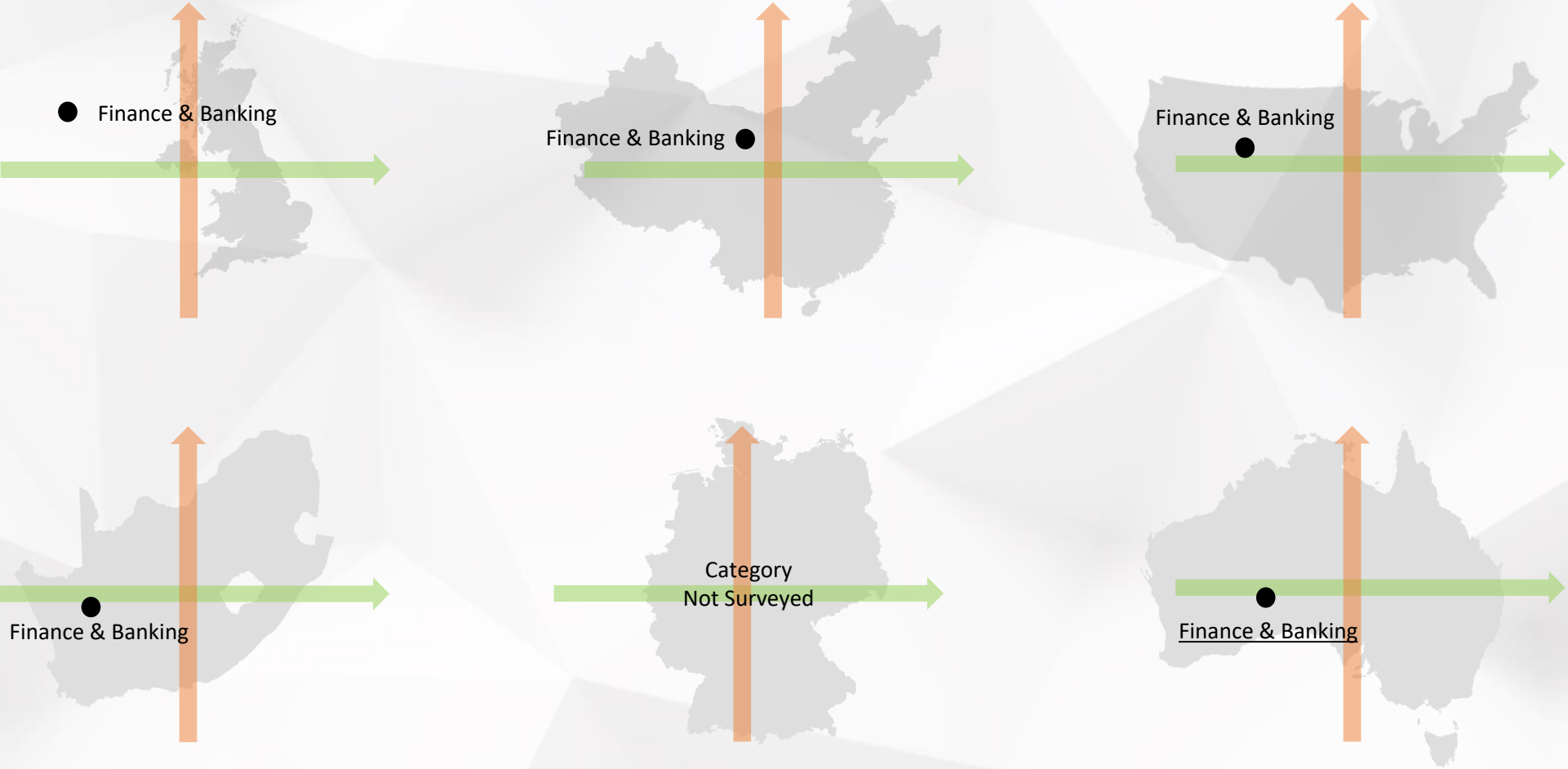
# FINANCE & BANKING

## CATEGORY DEFINED

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



# DEFENDER/SURVIVOR ACROSS ALL MARKETS



# AUSTRALIA

## CATEGORY COMPARISON

### Observations:

- Finance/Banking received the lowest average emotional response of all the categories surveyed in this market.
- Category had an average rational response of 31.6, which was the third highest behind Computing Devices and Tech B2B.

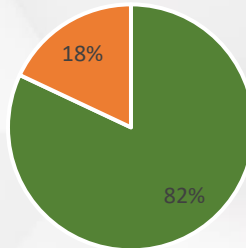


# FINANCE/BANKING



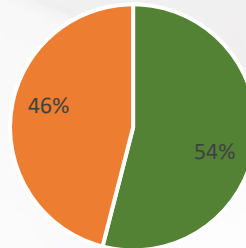
## EMOTIONAL DRIVERS

### Defend/Shame



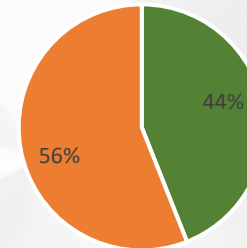
■ Join in the public shaming ■ Defend to the bitter end

### Experience



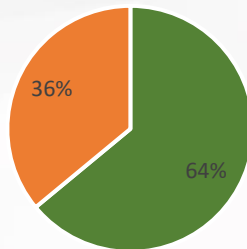
■ Completely miserable ■ It's a pleasure

### Disappeared



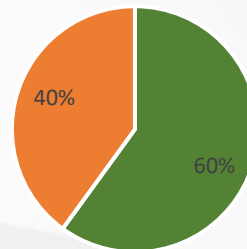
■ Good Riddance ■ I need it back!

### Love/Hate



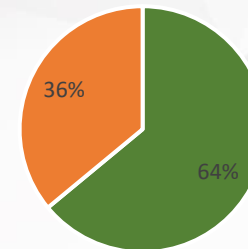
■ Hate them ■ Love them

### Overall Impression



■ It is the worst ever ■ It is amazing

### Social Impact



■ Does harm ■ Out for Common good

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



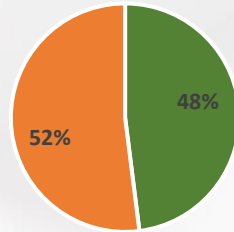


# FINANCE/BANKING

## RATIONAL DRIVERS

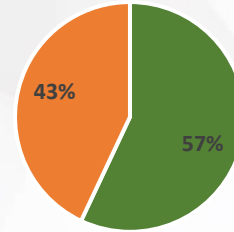


### Executive Behaviour



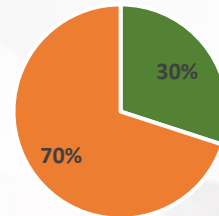
■ Strong influence ■ Not influence at all

### Innovation



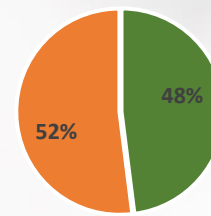
■ Stuck in the stone age ■ Cutting Edge

### Necessary



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

### Intent to Purchase



■ No way ■ Absolutely plan to purchase

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



# HEALTH & WELLNESS

## CATEGORY DEFINED

**Health and Wellness Products:** Products and services that protect, enhance, help to regain or maintain health and wellness. This includes prescription drugs and over-the-counter treatments, vitamins, supplements, health, nutrition and fitness services and devices



# SURVIVOR ACROSS ALL MARKETS

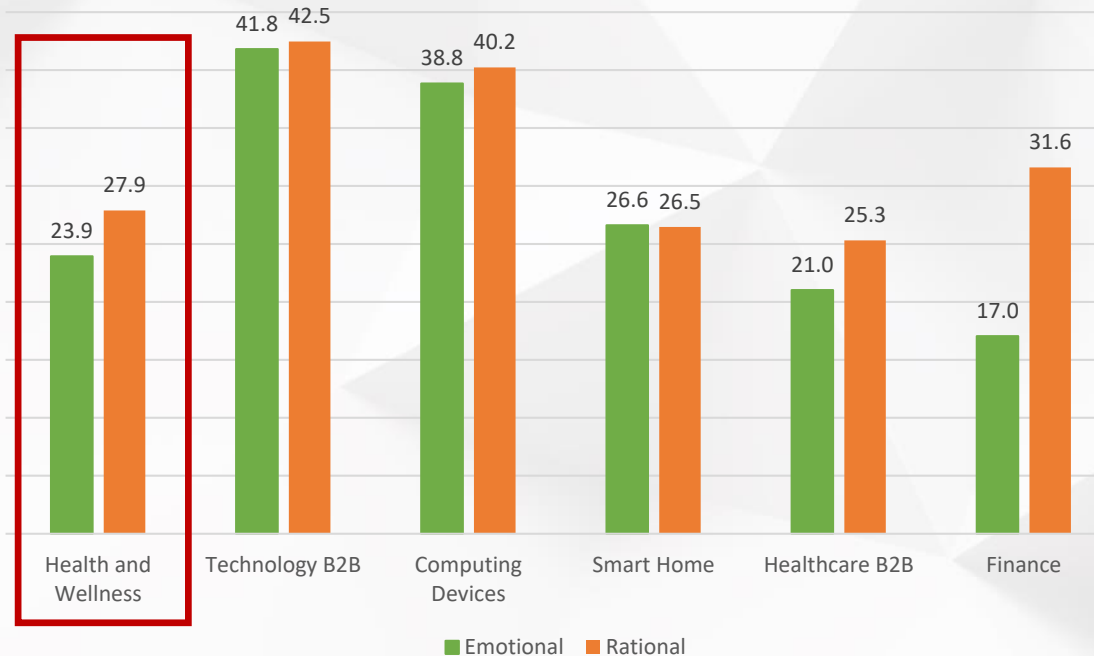


# AUSTRALIA

## CATEGORY COMPARISON

### Observations:

- Health & Wellness Category had an average emotional response of 23.9, which is nearly half of the emotional responses of the Tech B2B Category.
- Health & Wellness Category had an average rational response of 27.9, which was only higher than Healthcare B2B and Smart Home.

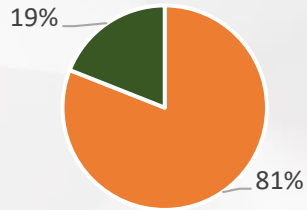


# HEALTH & WELLNESS

## EMOTIONAL DRIVERS

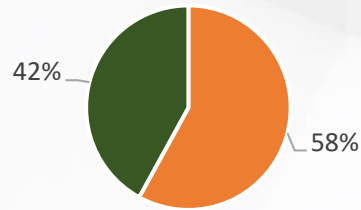


### Defend/Shame



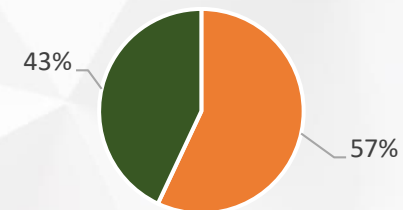
Join in the public shaming ■ Defend to the bitter end

### Experience



Completely miserable ■ It's a pleasure

### Disappeared



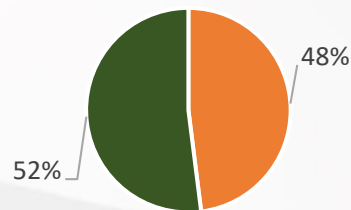
Good Riddance ■ I need it back!

### Love/Hate



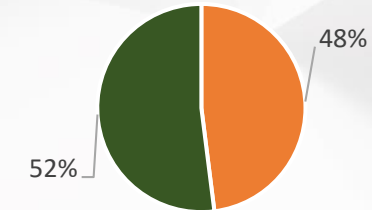
Hate them ■ Love them

### Overall Impression



It is the worst ever ■ It is amazing

### Social Impact



Does harm ■ Out for Common good

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

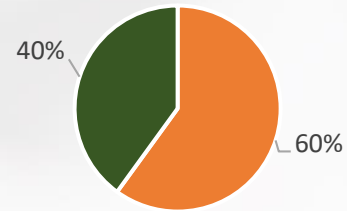


# HEALTH & WELLNESS

## RATIONAL DRIVERS

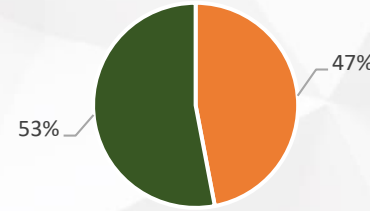


### Executive Behaviour



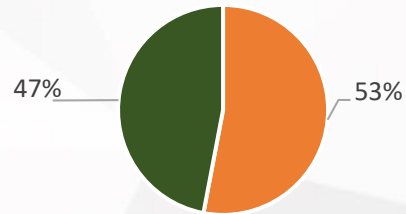
■ Strong influence ■ Not influence at all

### Innovation



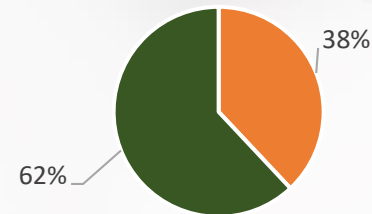
■ Stuck in the stone age ■ Cutting Edge

### Necessary



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

### Intent to Purchase



■ No way ■ Absolutely plan to purchase

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



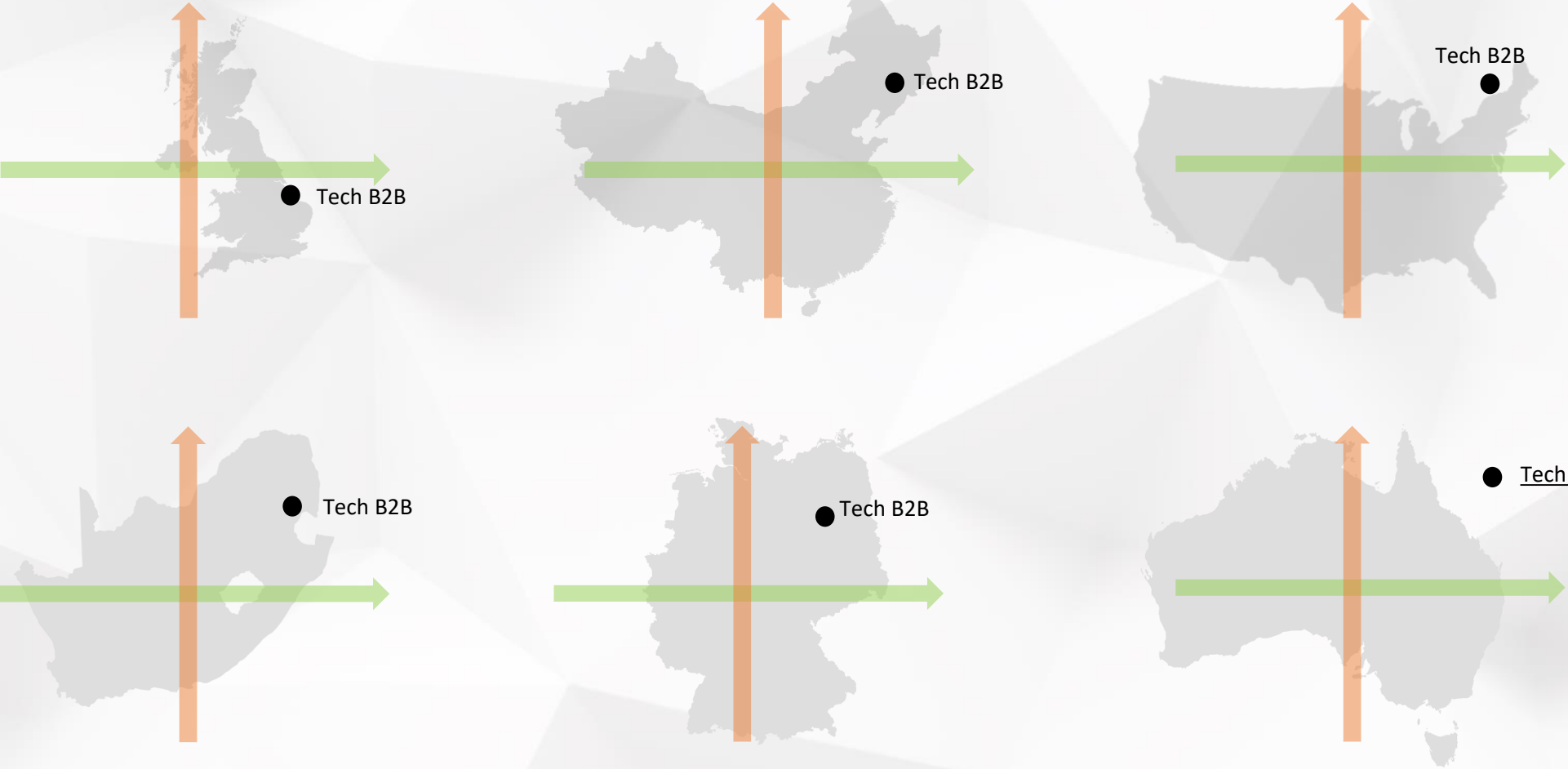
# TECHNOLOGY B2B

## CATEGORY DEFINED

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



# MOVER IN AUSTRALIA





# AUSTRALIA

## CATEGORY COMPARISON

### Observations:

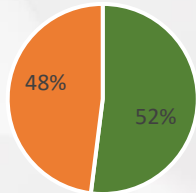
- Tech B2B Category received the highest average emotional and rational responses of any category surveyed in this market.



# TECHNOLOGY B2B

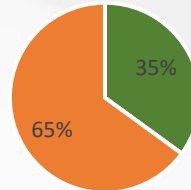
## EMOTIONAL DRIVERS

### Defend/Shame



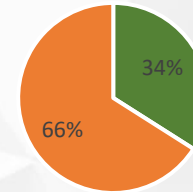
■ Join in the public shaming ■ Defend to the bitter end

### Experience



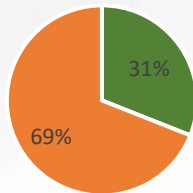
■ Completely miserable ■ It's a pleasure

### Disappeared



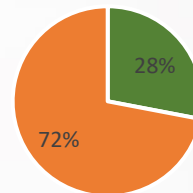
■ Good Riddance ■ I need it back!

### Love/Hate



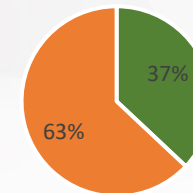
■ Hate them ■ Love them

### Overall Impression



■ It is the worst ever ■ It is amazing

### Social Impact



■ Does harm ■ Out for Common good

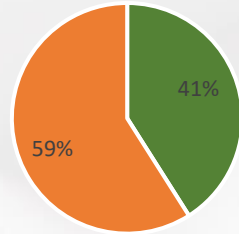
\*Percentages represent the percent of respondents who responded above or below the average emotional score by category driver.



# TECHNOLOGY B2B

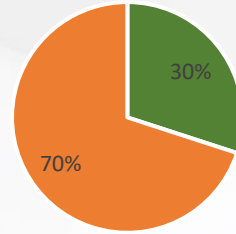
## RATIONAL DRIVERS

Executive Behaviour



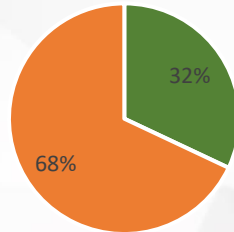
■ Strong influence ■ Not influence at all

Innovation



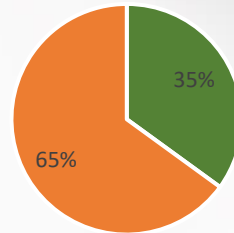
■ Stuck in the stone age ■ Cutting Edge

Necessary



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

Intent to Purchase



■ No way ■ Absolutely plan to purchase

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



# HEALTHCARE SOLUTIONS

## CATEGORY DEFINED

**Business Healthcare Solutions/Supplies:** Including employee healthcare plans, insurance, pharmaceuticals, machines, devices and supplies for hospitals and other healthcare-related industries.



# ***SURVIVOR*** IN AUSTRALIA

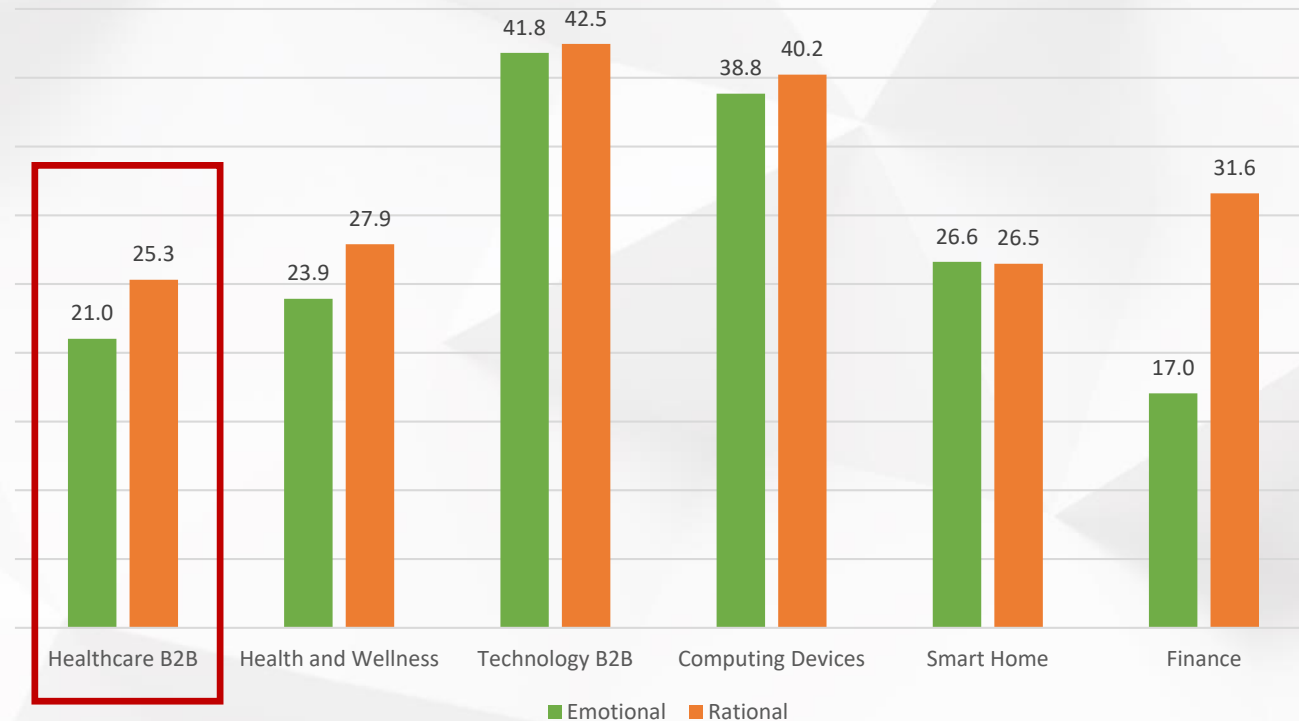


# AUSTRALIA

## CATEGORY COMPARISON

### Observations:

- Healthcare Solutions Category had an average emotional response of 23.0
- Healthcare Solutions Category had an average rational response of 25.3.

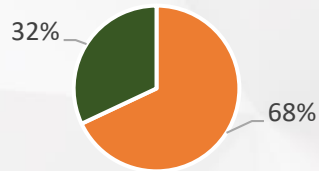


# HEALTHCARE SOLUTIONS

## EMOTIONAL DRIVERS

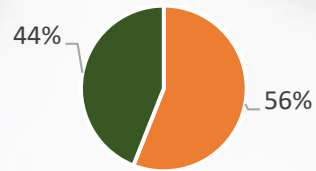


### Defend/Shame



Join in the public shaming    Defend to the bitter end

### Experience



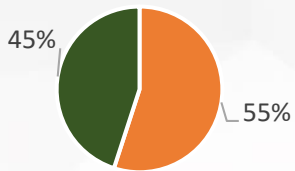
Completely miserable    It's a pleasure

### Disappeared



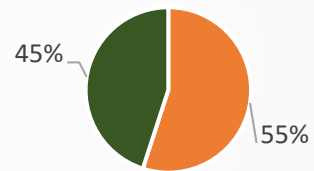
Good Riddance    I need it back!

### Love/Hate



Hate them    Love them

### Overall Impression



It is the worst ever    It is amazing

### Social Impact



Does harm    Out for Common good

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

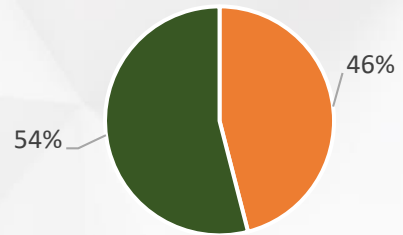


# HEALTHCARE SOLUTIONS

## RATIONAL DRIVERS

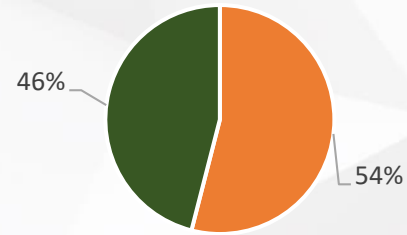


### Executive Behaviour



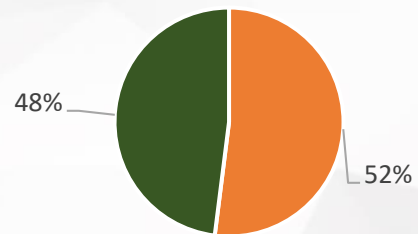
■ Strong influence ■ Not influence at all

### Innovation



■ Stuck in the stone age ■ Cutting Edge

### Necessary



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

### Purchase Intent



■ No way ■ Absolutely plan to purchase

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





# BRANDS IN ***MOTION***

APPENDIX



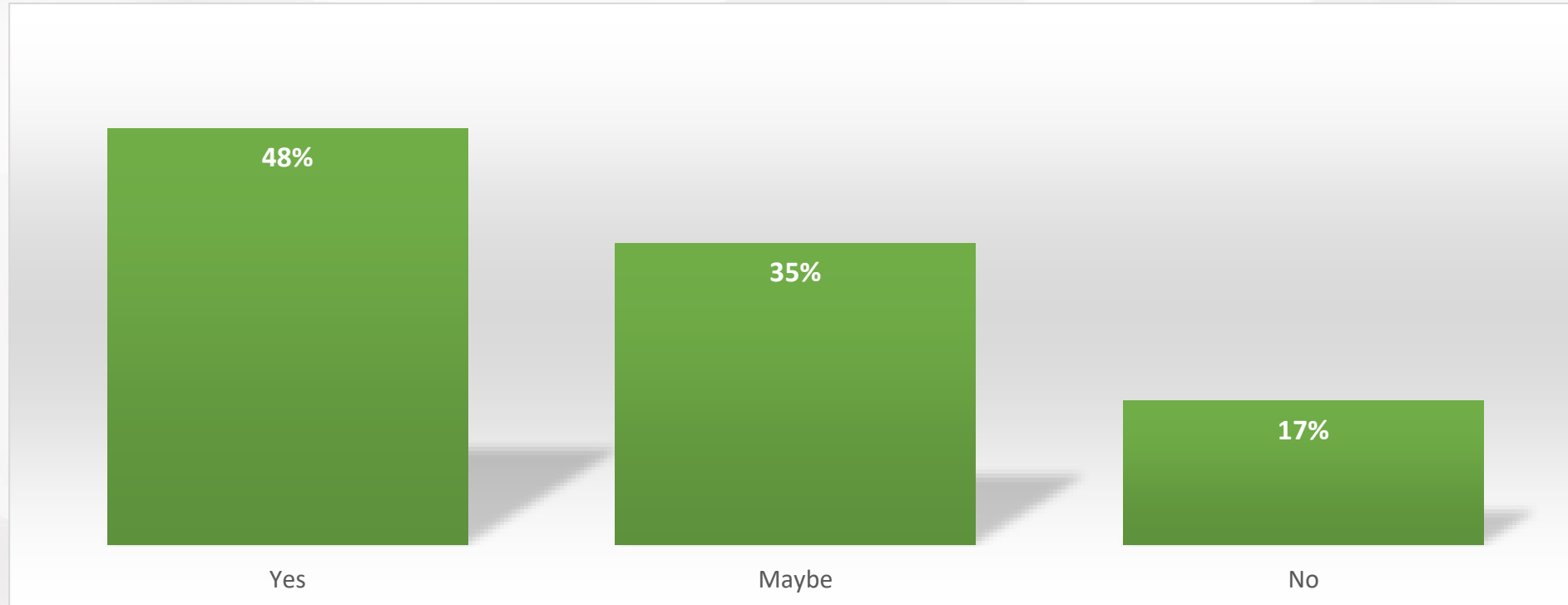
# Four Realities

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



# Reality #1: Stability is an element of motion

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



**83% of the 4908 respondents in AU believe that Business/Brands *may* have the CAPABILITY to provide stability. (China 89%, UK 75%, US 81%)**



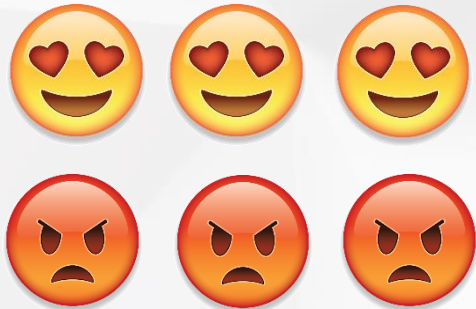
# Reality #2: Cutting –edge is transcendent

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



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

LOVE VS. HATE

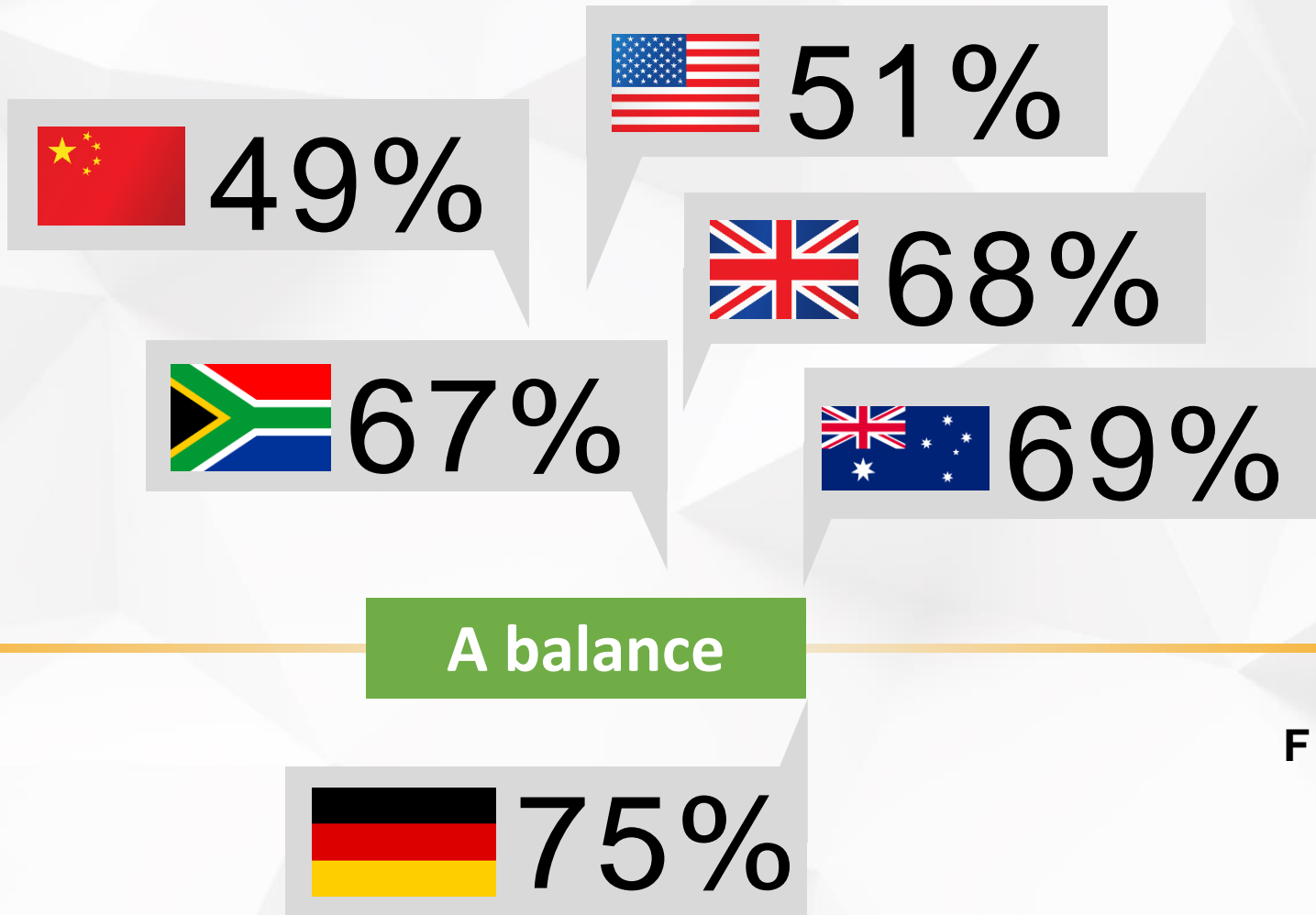


However

DEFEND VS. SHAME



# Reality #3: The Unilever effect



PURPOSE

FUNCTIONALITY

A balance



# Media Questions

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

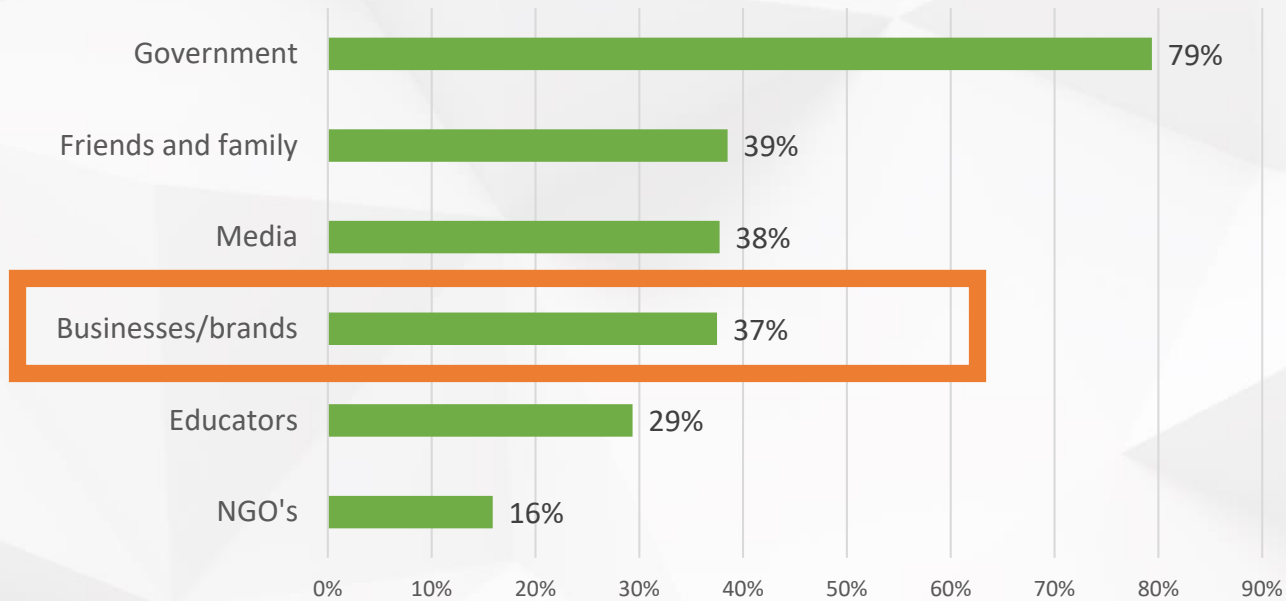


## Media Question (M1)

Who is responsible for stability?

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

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



**37% of the 4908 respondents believe that Business/Brands are RESPONSIBLE for creating stability.**



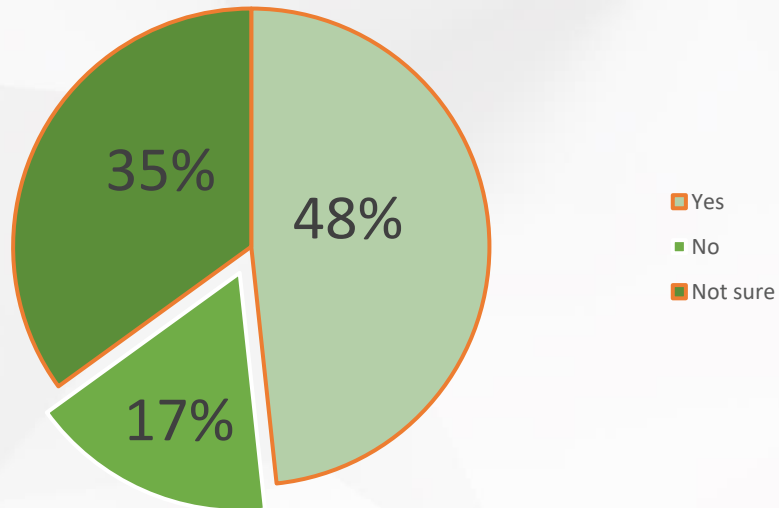


## Media Question (M2)

Can brands provide stability?

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

1. Yes 2. No 3. Not Sure



83% of the 4908 respondents believe that Business/Brands may have the CAPABILITY to provide stability.

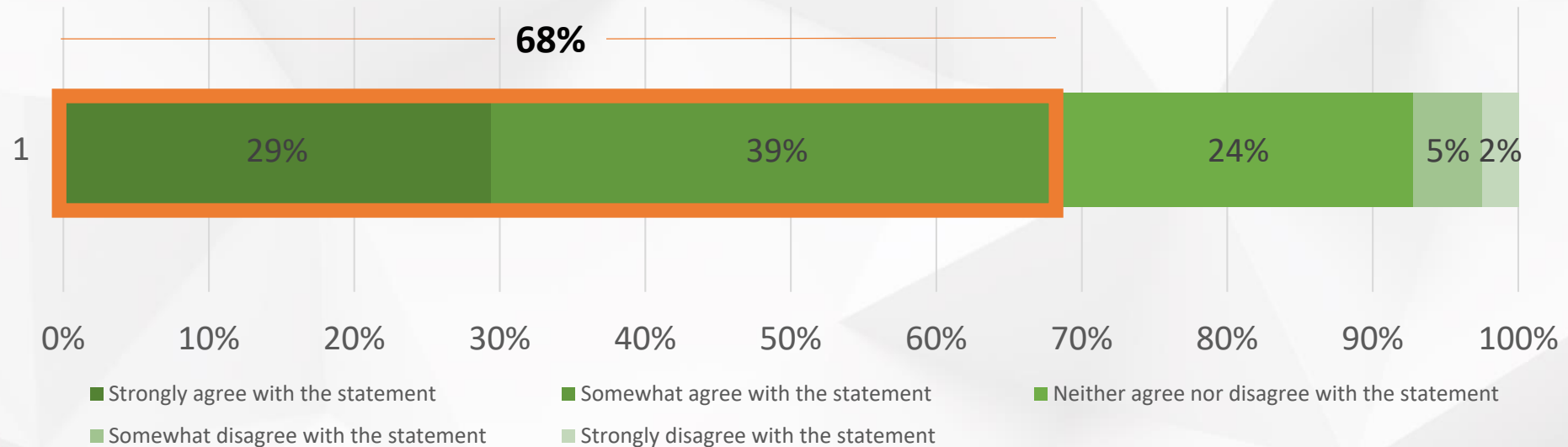


## Media Question (M3)

Should brands take a stand?

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

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



**68% of the 4908 respondents either strongly or somewhat agree that they EXPECT brands to take a stand on important issues.**

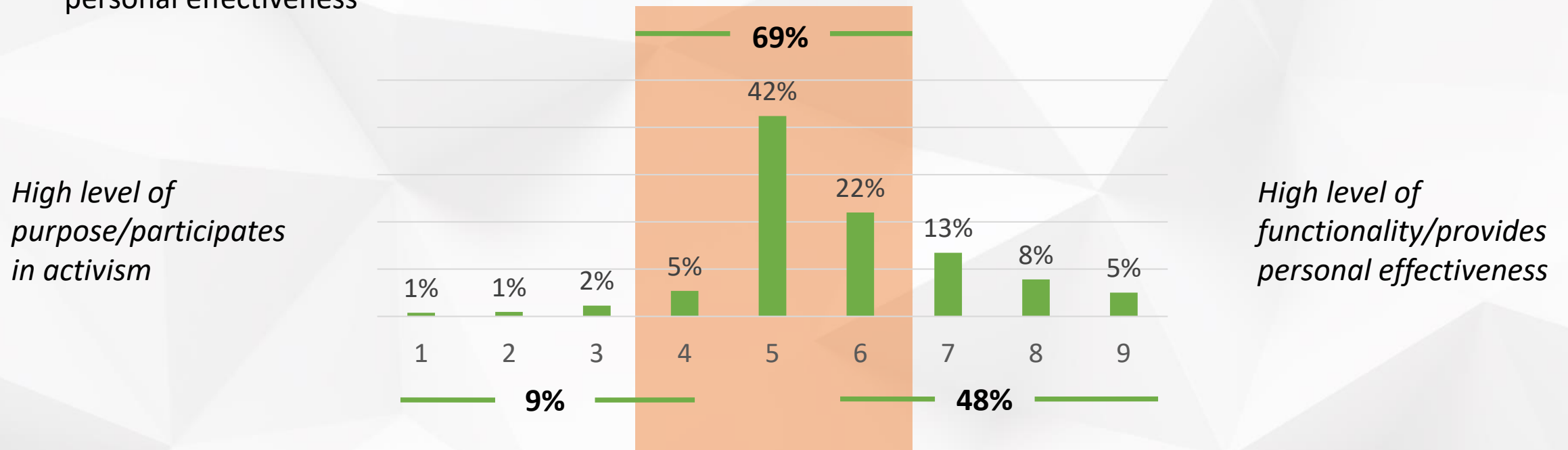


## Media Question (M4)

Support for committed brands

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

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



48% of the 4908 respondents gave an indication that they are more likely to support a brand that provides a high level of functionality/provides personal effectiveness.

**69% Straddle the middle = Unilever Reality/Expect both.**

