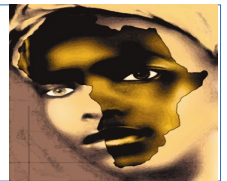


MSRA Newsletter



MARKETING & SOCIAL RESEARCH ASSOCIATION

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MSRA Events 2013

MSRA 2013 Conference - June 20th 2013 (Laico Regency Hotel)

GfK Verein and MSRA Interviewer Accreditation Program (Phase 1) - July 29th to Aug 3rd.

MSRA Mount Kenya Climb - August 17th - 20th 2013.

MSRA Basic Training - Aug 2013

MSRA 2013 CONFERENCE

"New Trends in Market Research"

The Marketing & Social Research Association (MSRA) will hold its 5th convention themed "**New Trends in Market Research**" on the 20th of June 2013, at Laico Regency, Nairobi Kenya.

Keynote Speaker 1

Dick Omondi, Head of Communications and PR, Airtel Kenya.

Dick has over 20 years of domestic and international experience in marketing, advertising, public relations and communications with proven track record in managing FMCG and telecom-



communications brands in East Africa like Vodacom in Tanzania, Celtel Uganda

(now airtel) and also held senior marketing and management positions at Celtel, Coca-Cola, Colgate-Palmolive, East African Breweries and Kenya Airways.

Keynote Speaker 2

Tim Chege, Regional Managing Director for Adcock Ingram E.A.

Tim has over 20 years experience



in Brand Management, sales, Marketing and General Management having worked for

Welcome (k) Ltd, SC Johnson Wax, and KBL. He also served as the Group Marketing Manager for Nation Media Group and CEO for Ketepa for 7 years.

TOP 100 MOST VALUABLE GLOBAL BRANDS

By MILLWARD BROWN

Apple remains the BrandZ™ Top 100 Most Valuable Global Brand for 2013, worth \$185 billion. Apple grew just +1% in the last year compared to a +51% growth for its closest competitor, Samsung, which is now no.30 in the global ranking with a brand value of \$21 billion.

Technology and Telecom brands together make up the largest segment of the BrandZ™ Top 100, both in the number of brands represented and in their aggregate value, with six in the Top 10, says Charles Foster, Regional Managing Director for Millward Brown Africa & Middle East: "The 2013 BrandZ ranking reflects the increasing influence and rise of Africa via the multiple global brands that are investing in the African continent. Whilst global brands like Coca-Cola have always reflected a significant share in Africa in their valuation, it is exciting to see the likes of Unilever, P&G, and Telco brands like Airtel, extend their influence as they grow in the African continent. And of course, the growth of African brands like SABMiller and MTN, reflect the increasing power of African brands as they extend into the wider globe."

"As the difficult economic times persisted in some markets, we saw a trend towards more in-the-home socialising as consumers became more careful in spending." Says Chris Githaiga, Managing Director for Millward Brown East Africa. "This, coupled with the fact that there are now more forms of entertainment in the home, including Pay TV, game consoles, DVDs and Internet, meant that consumers were less likely to leave their homes to seek entertainment in bars etc. Beer was the highest growth

category in the rankings this year partly driven by SAB Miller which has experienced tremendous growth while brands such as Nivea and L'Oréal have benefitted through their innovation, acquisitions and consumer centric approach."

Samsung's massive growth is also reflected in Africa - its recent push for new markets in Africa is no doubt paying off. Furthermore, it is set to open a television, laptop and printers' assembly plant in Kenya by end of year, positioning Nairobi as the nerve centre of its operations in East Africa. "Despite a more competitive marketplace and other challengers nipping at its heels, Apple's ability to maintain its no.1 position demonstrates the value that having a strong brand brings to business. People still love the brand regardless of its stock price."

The Top 10 Most Valuable Global Brands 2013

Rank 2013	Category	Brand	Brand Value 2013 (\$M)	Brand Value Change	Rank 2012
1	Technology	Apple	185,071	+1%	1
2	Technology	Google	113,669	+5%	3
3	Technology	IBM	112,536	-3%	2
4	Fast Food	McDonald's	90,256	-5%	4
5	Soft drinks	Coca-Cola	78,415	+6%	6
6	Telecoms	AT&T	75,507	+10%	8
7	Technology	Microsoft	69,814	-9%	5
8	Tobacco	Marlboro	69,383	-6%	7
9	Credit cards	Visa	56,060	+46%	15
10	Telecoms	China Mobile	55,368	+18%	10

Google is also a serious challenger for the no.1 spot, reversing last year's decline to grow +5% in brand value this year. The brand is no.2 in the ranking with a value of \$114 billion. IBM is no.3 in the ranking with a brand value of \$112 billion.

The combined value of the Top100 has grown by 77% since 2006. They are now worth \$2.6 trillion.

Continued on pg 2

- Eileen Campbell, Global CEO of brand research company Millward Brown added: **“Brand valuation and other measures that show return on marketing investment give marketers a stronger voice in the boardroom by ensuring that marketing is better understood and accounted for as a key driver of financial and business success.”**

The Most Valuable Global Brands 2013 - African Relevant Brands

Rank 2013	Category	Brand	Brand Value 2013 (\$M)	Brand Value Change	Rank 2012
17	Telecoms	Vodafone	39,712	-8%	12
30	Technology	Samsung	21,404	+51%	55
32	Personal Care	Pampers	20,594	13%	35
42	Personal Care	L'Oréal	17,971	30%	57
60	Telecoms	Orange	13,829	-10%	50
49	Oil & Gas	Shell	17,678	-1%	39
50	Personal Care	Colgate	17,250	15%	51
75	Soft Drinks	Pepsi	12,029	-5%	67
79	Telecoms	MTN	11,448	23%	88
80	Retail	Woolworths	11,039	N/A	N/A
87	Banks	Standard Chattered	10,160	1%	79
89	Telecoms	Airtel	10,054	-13%	71
91	Fast Food	KFC	9,953	12%	91
98	Shipping	DHL	8,940	18%	100

Key findings highlighted in this year's research report include:

Top risers provide meaningful differentiation:

The Top 10 brand value growth risers score significantly higher than average on the BrandZ™ equity measures of Meaningful, different and salient. Prada grew the most in brand value, by +63%. Outstriping the performance of all other luxury

brands it is now no.4 in the luxury category (95 globally) and worth \$9.5 billion.

Brewers experienced a rapid rise:

The world's most widely consumed alcoholic beverage, beer, was the highest growth category in the rankings this year. The Top 10 beer brands grew by +36% and are now worth a combined \$63 billion. The sector has benefited from growing sales in Latin America and China. Global brewer Heineken is the third largest beer brand worth \$8 billion, and profited from publicity around the James Bond *Skyfall* movie. Brazil's Brahma beer grew by +61% in the last year and is worth \$4 billion.

High value brands provide faster growth:

An analysis of the BrandZ™ Top 100 Most Valuable Global Brands as a 'stock portfolio' over the last eight years shows a highly favourable performance compared to a current stock market index, the S&P500. While the value of the companies in the S&P500 index grew by 23%, the BrandZ™ portfolio grew by 58%, proving that companies with strong brands are able to deliver better value to their shareholders.

As technology brands continue to dominate the ranking the sun rises on digital China:

Technology and telecoms brands continue to dominate the ranking with 29 brands in the global BrandZ™ Top100, worth 43% of the total value of the Top 100, more than \$1 trillion. Growth in this sector remains

flat. In contrast to a decline in Facebook's brand value, its Chinese equivalent, Tencent, rose 52%, making it one of the Top 10 risers in the ranking with almost 800 million active users. Yahoo also joins

the ranking after the appointment of a new CEO from Google lifted expectations and share price which drove the appreciation of brand value.

NOTES:

About the BrandZ™ Top 100 Most Valuable Global Brands Ranking:

Developed for WPP's operating companies by Millward Brown Optimor, the BrandZ™ Top 100 Most Valuable Global Brands ranking is now in its eighth year. It is the only study to combine measures of brand equity based on interviews with over two million consumers globally about thousands of global 'consumer facing' and business-to-business brands with a rigorous analysis of the financial and business performance of each company (using data from Bloomberg and Kantar Worldpanel) to separate the value that brand plays in driving business revenue and market capitalization. Consumer perception of a brand is a key input in determining brand value because brands are a combination of business performance, product delivery, clarity of positioning, and leadership. The ranking takes into account regional variations since, even for truly global brands, measures of brand contribution might differ substantially across countries. ■

GfK VEREIN AND MSRA INVESTING IN THE FUTURE OF MARKET RESEARCHERS IN KENYA.

By JACQUELINE KAMAU (WIN WIN)

The GfK Verein (GfK Association) - the not-for-profit, non-commercial arm of GfK - in cooperation with MSRA is implementing a two- year programme that seeks to improve the quality of data collection in Kenya by setting up Interviewer Training Academies. This support will assist in the development of a pool of accredited professional interviewers with the competencies to collect quality data from the field. Ultimately, it is expected that the interviewer accreditation scheme will support the market research industry in upholding the quality of fieldwork and bring pride and integrity to the research profession.

A local independent training provider, Evolution Africa will develop and deliver the training. Within the 2 years of the project GfK Verein support will include the development of the training materials; a series of interviewer and supervisor workshops and; support to MSRA in marketing, data-base building and set up of regulation processes/systems. It is expected that thereafter the training will be self-sustaining.

Supported by Federal German Ministry for Economic Co-operation and Development (BMZ), the project is part of a broader Public Private Partnership (PPP) programme with the mandate to support private sector long term investments in developing economies. Overall, the program aims to provide capacity building support to the market research industry in Africa, understanding that such strategic investments is key to doing business sustainably. . The second component of the programme involves co-operation with Universities to set up post-graduate qualifications in Market Research. In Kenya, GfK Verein is partnering with the University of Nairobi on a Masters course in Marketing with a specialization option in Market Research. The course is now running in its third semester.

The PPP-programme is also being executed in 3 other African countries; Nigeria, Ghana, and South Africa. ■