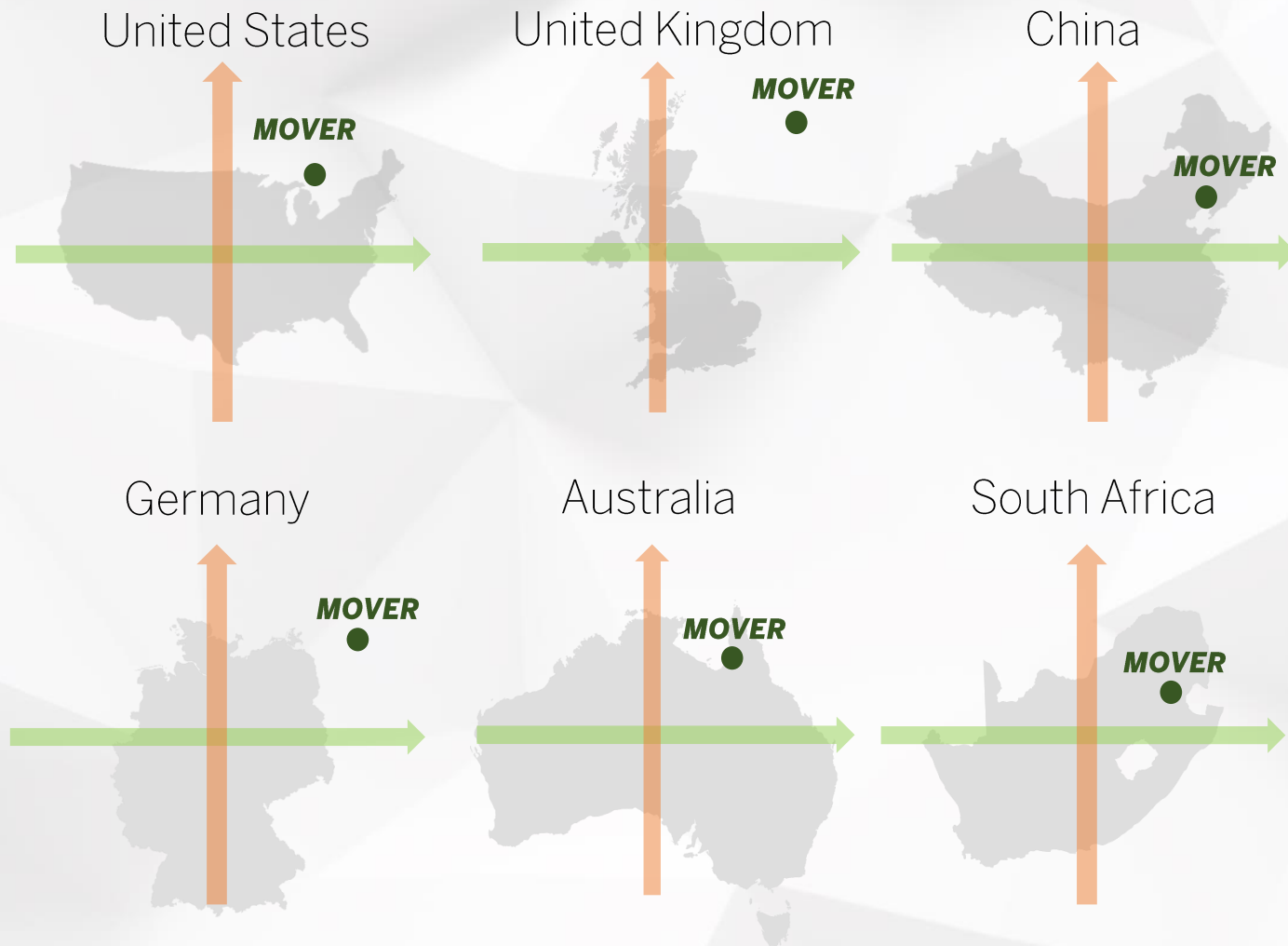




# BRANDS IN ***MOTION***

COMPUTING DEVICES CATEGORY

# COMPUTING DEVICES **CATEGORY**



## COMPUTING DEVICES:

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

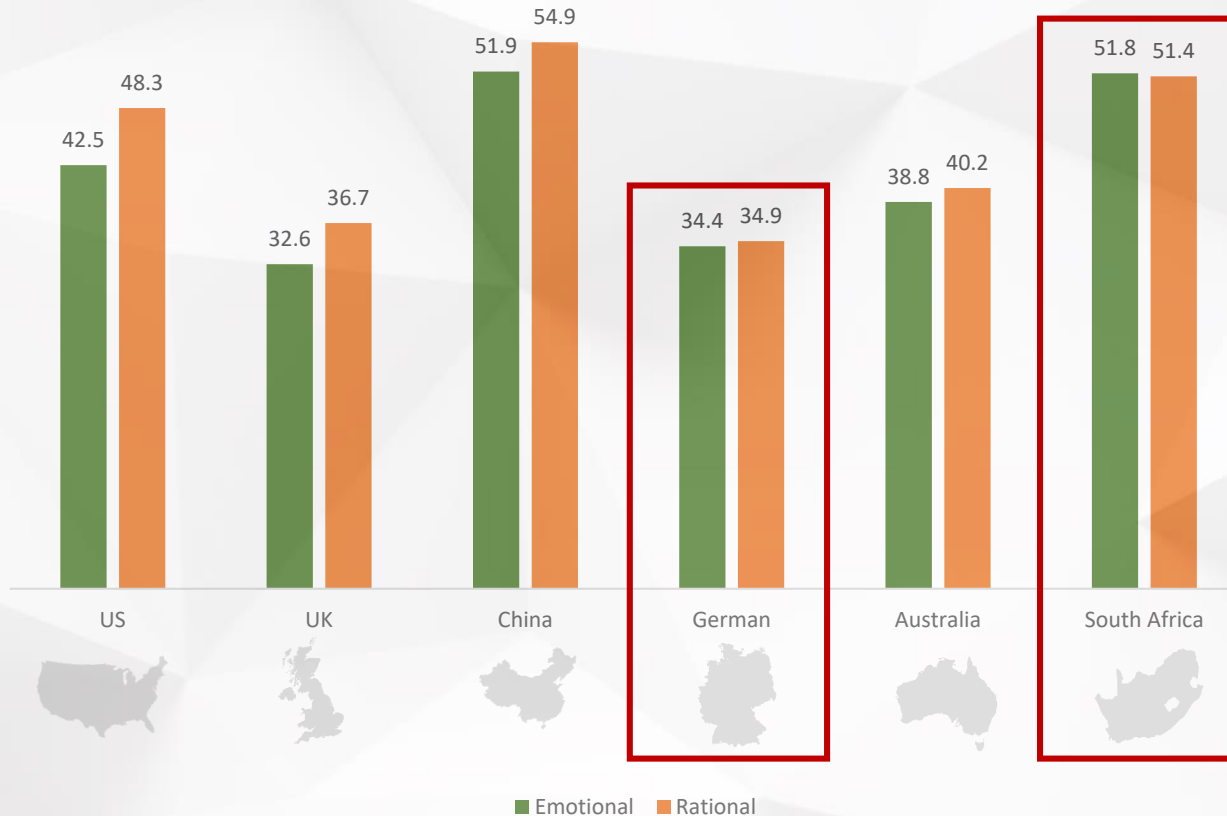
The category was surveyed in all 6 markets and in each market the category is seen as a mover based on the average emotional and rational responses of those surveyed.

A total of 5,079 people answered questions specific to the category across the six markets surveyed.

(US: 947, UK:1303, China: 853, Germany: 616, South Africa: 755 & Australia: 605)



# GLOBAL VIEW: **COMPUTING DEVICES**



## OBSERVATIONS

- South African was the only market to have a higher emotional average response than rational average out of any market surveyed.
- Respondents in Germany had the lowest Rational average response to the category vs. the other five markets surveyed.

Data represents an average respondent score on a scale of -100 to 100 across the ten category drivers. (6 Emotional and 4 Rational)

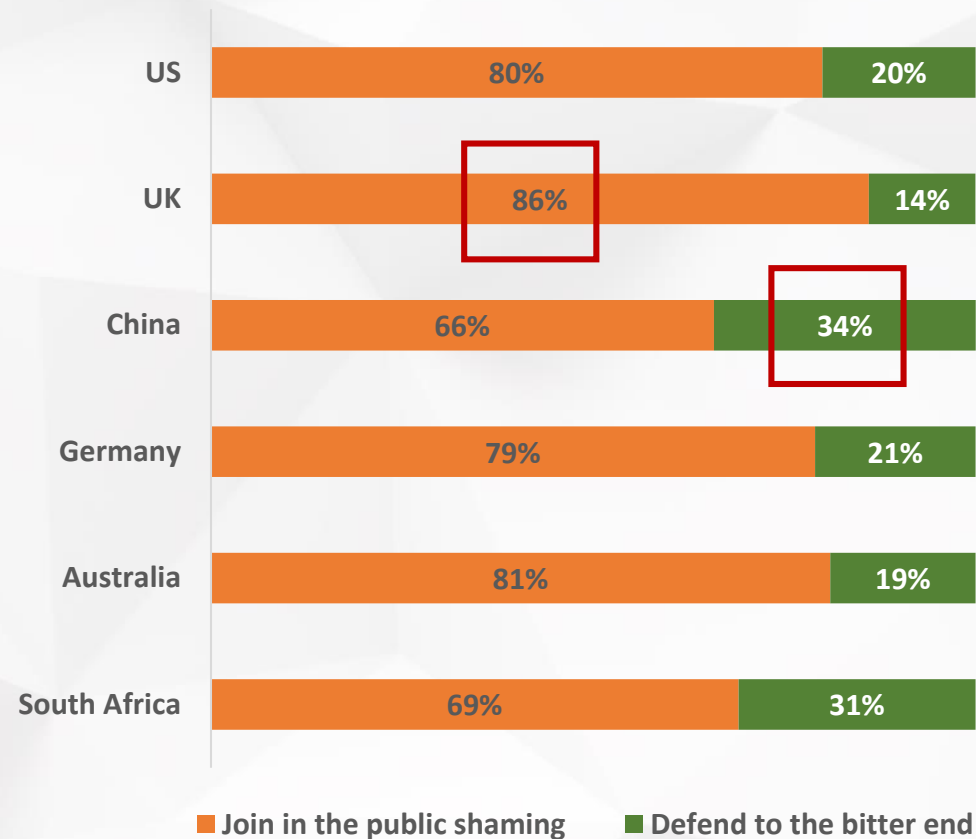




# BRANDS IN ***MOTION***

Emotional Drivers

# GLOBAL VIEW: **EMOTIONAL DRIVER**



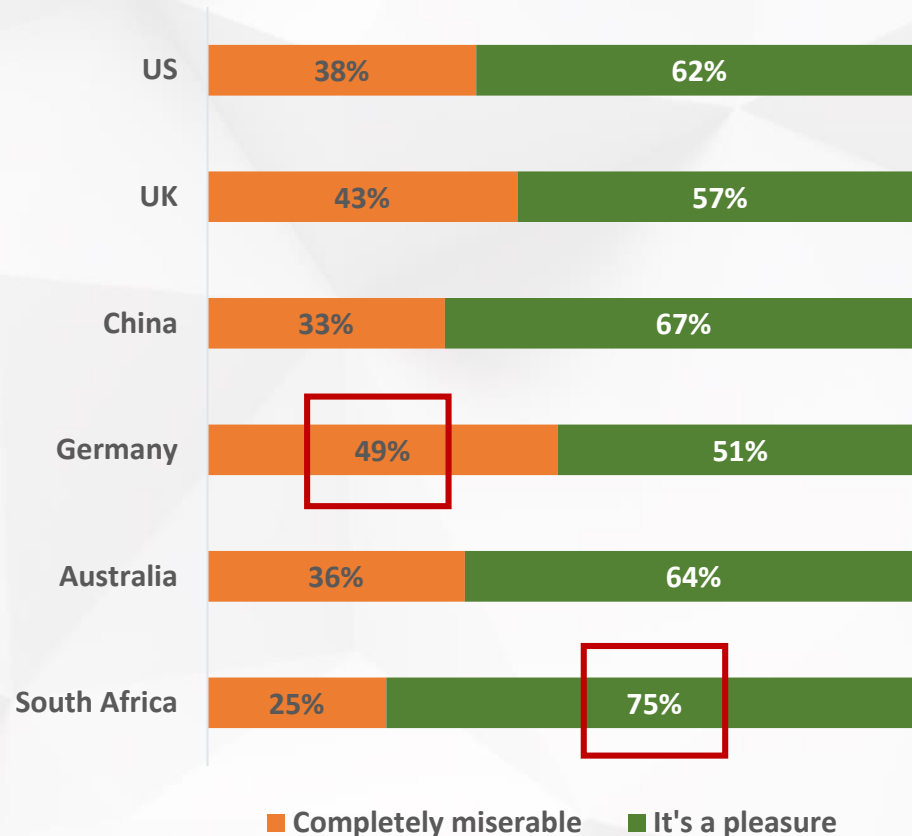
## DEFEND OR SHAME

Suppose a Computing Devices Company was publicly under attack for a product or service issue, would you?

- Respondents in China had the highest percentage of respondents indicating “Defend to the bitter end” at 34%.
- Respondents in the UK had the highest percentage of respondents indicating “Join in the public shaming”.



# GLOBAL VIEW: **EMOTIONAL DRIVER**



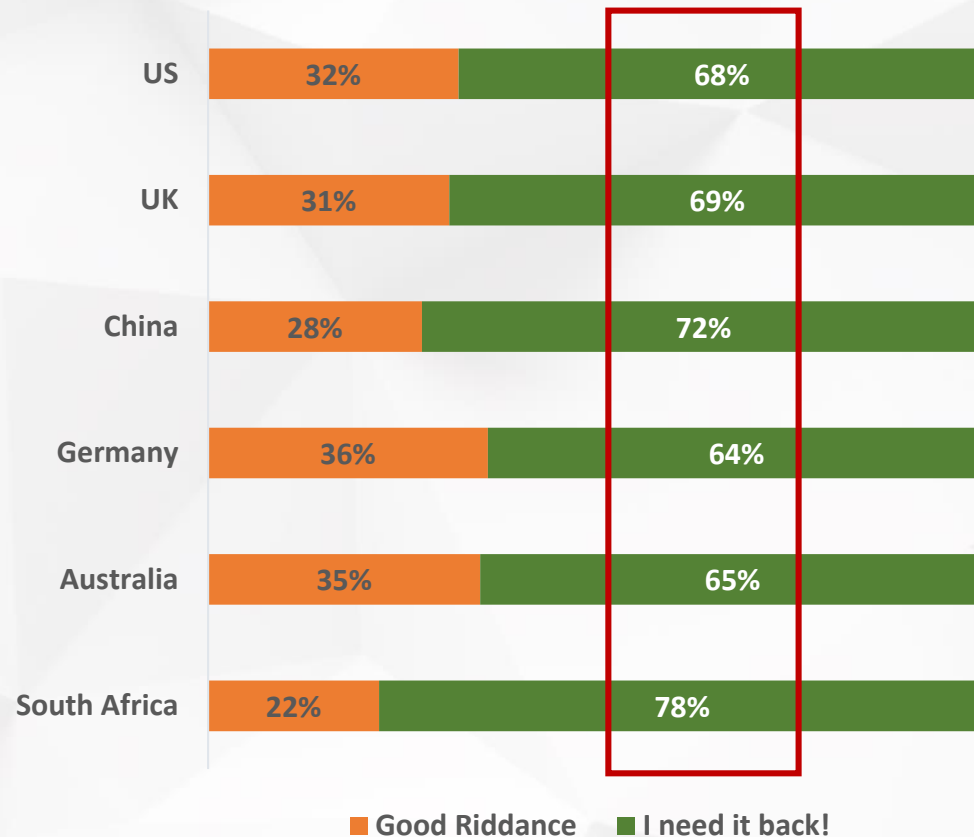
## EXPERIENCE

When interacting with Computing Device Companies, generally how is the experience?

- Nearly ½ of the respondents in Germany responded with “Completely miserable when asked about the experience with Computing Device Companies.
- ¾ South African respondents indicated “It’s a pleasure” when asked about the experience.



# GLOBAL VIEW: **EMOTIONAL DRIVER**



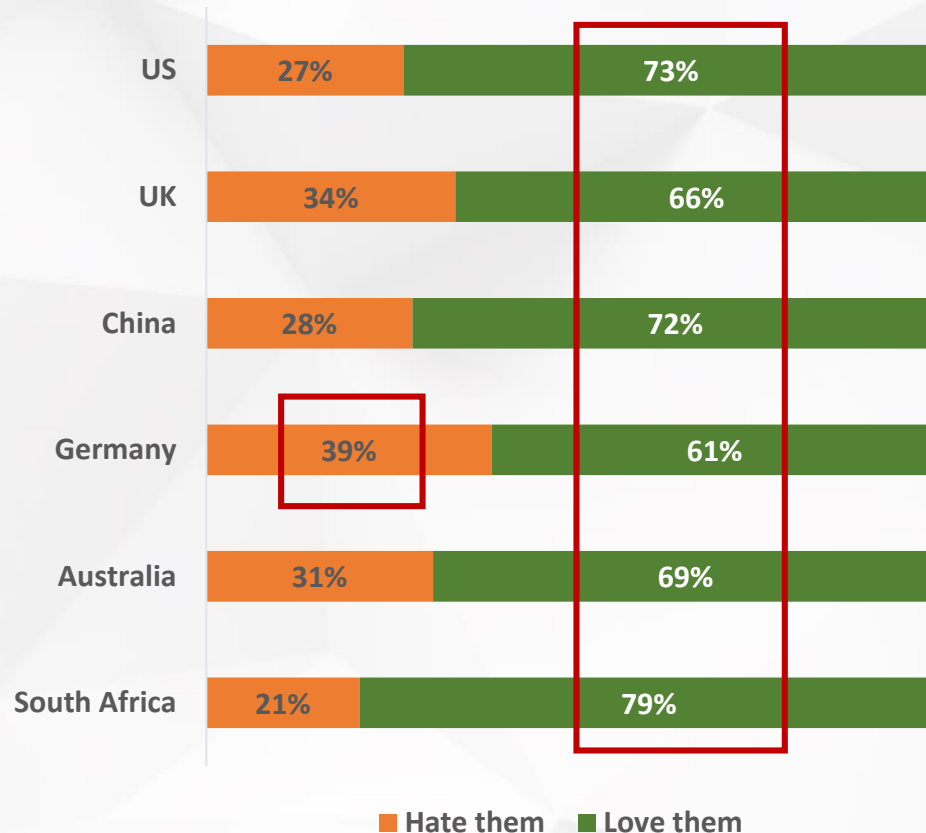
## DISAPPEARED

If the Computing Devices were to one day just disappear, how would you feel?

- Over 60% of respondents in all markets indicated “I need it back!” if Computing Devices were to one day disappear.



# GLOBAL VIEW: **EMOTIONAL DRIVER**



## LOVE/HATE

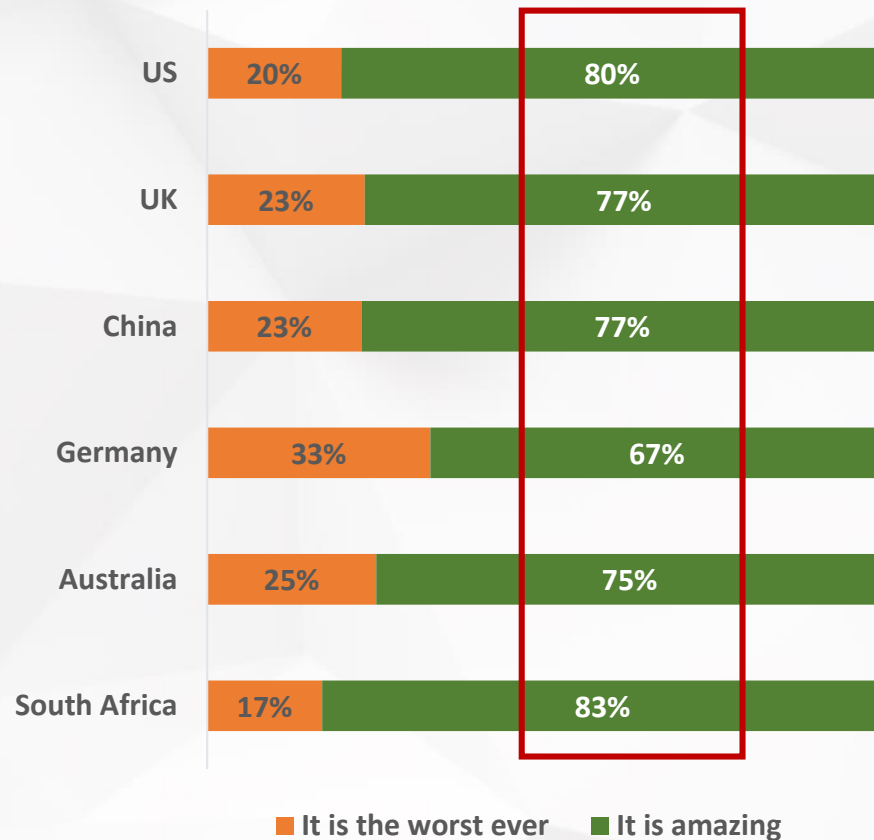
When thinking about Computing Device companies do you generally...?

- In all markets, over half of the respondents indicated “Love Them”
- Nearly  $\frac{3}{4}$  of respondents in US, China and South Africa responded with “Love them”.
- Germany had the least amount of love for the category with nearly 4 out of 10 respondents indicating they “Hate them”.





# GLOBAL VIEW: **EMOTIONAL DRIVER**



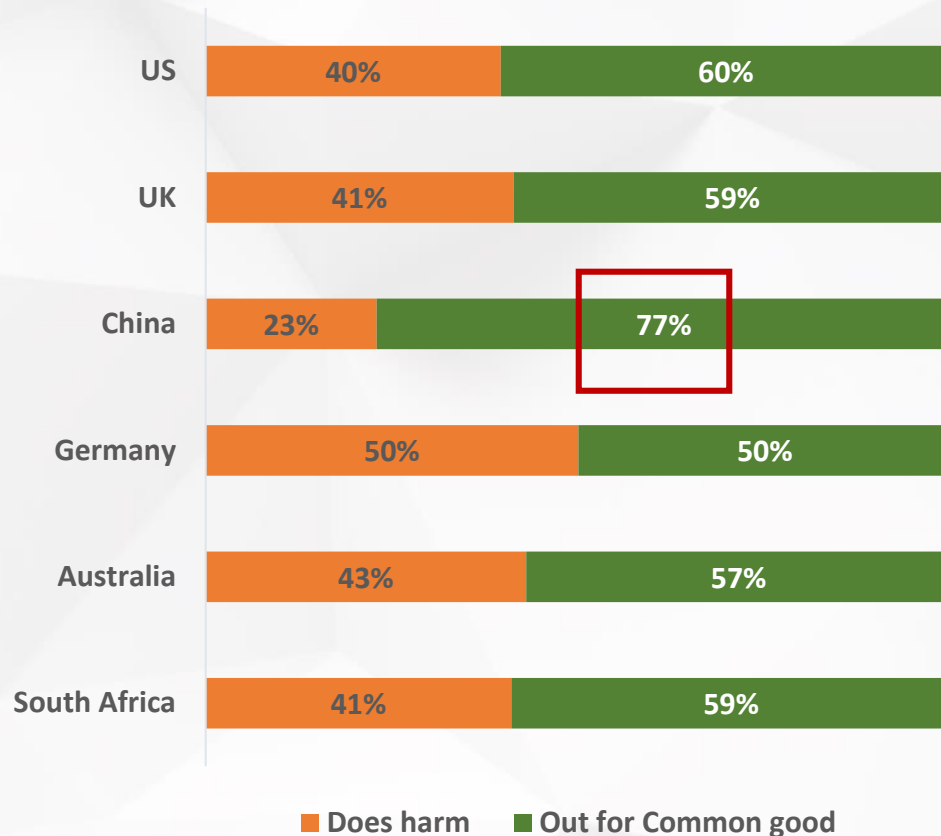
## OVERALL IMPRESSION

What is your overall impression of Computing Device companies?

- In all markets over 67% of respondents indicated that their overall impression of Computing Device Companies is “Amazing”. Most notable would be the 83% in South Africa.



# GLOBAL VIEW: **EMOTIONAL DRIVER**



## SOCIAL IMPACT

When thinking about Computing Device companies, what is their overall impact on society?

- Nearly 80% of respondents in China responded with “Out for the Common Good” when asked about Computing Device companies overall impact on society.

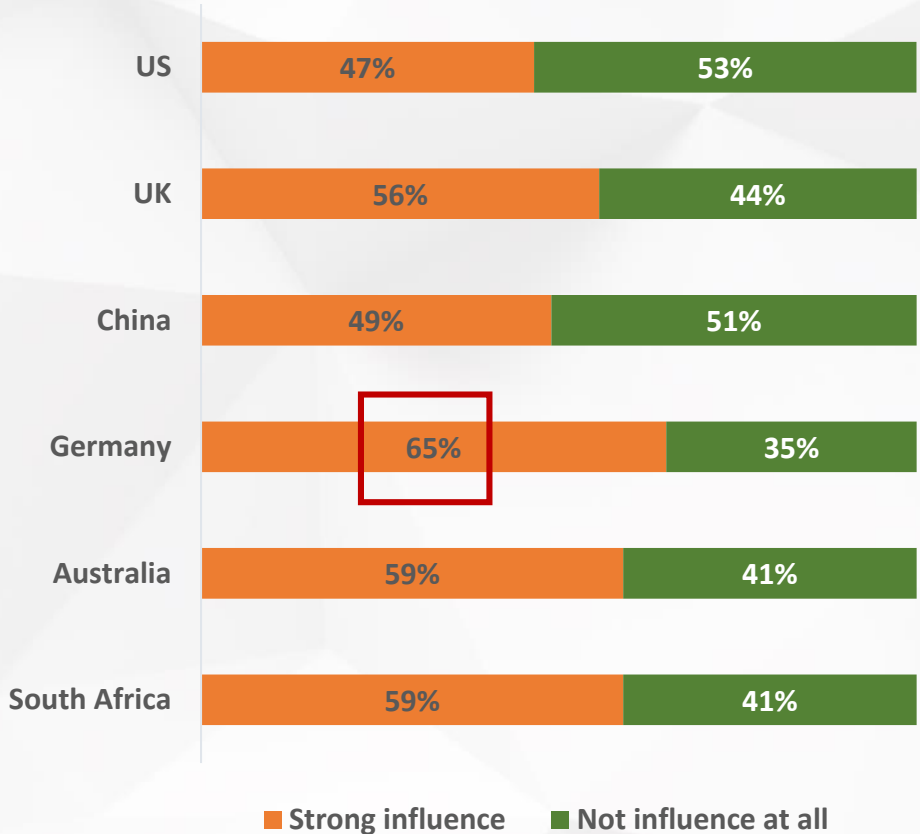




# BRANDS IN ***MOTION***

Rational Drivers

# GLOBAL VIEW: **RATIONAL DRIVER**



## EXECUTIVE BEHAVIOUR

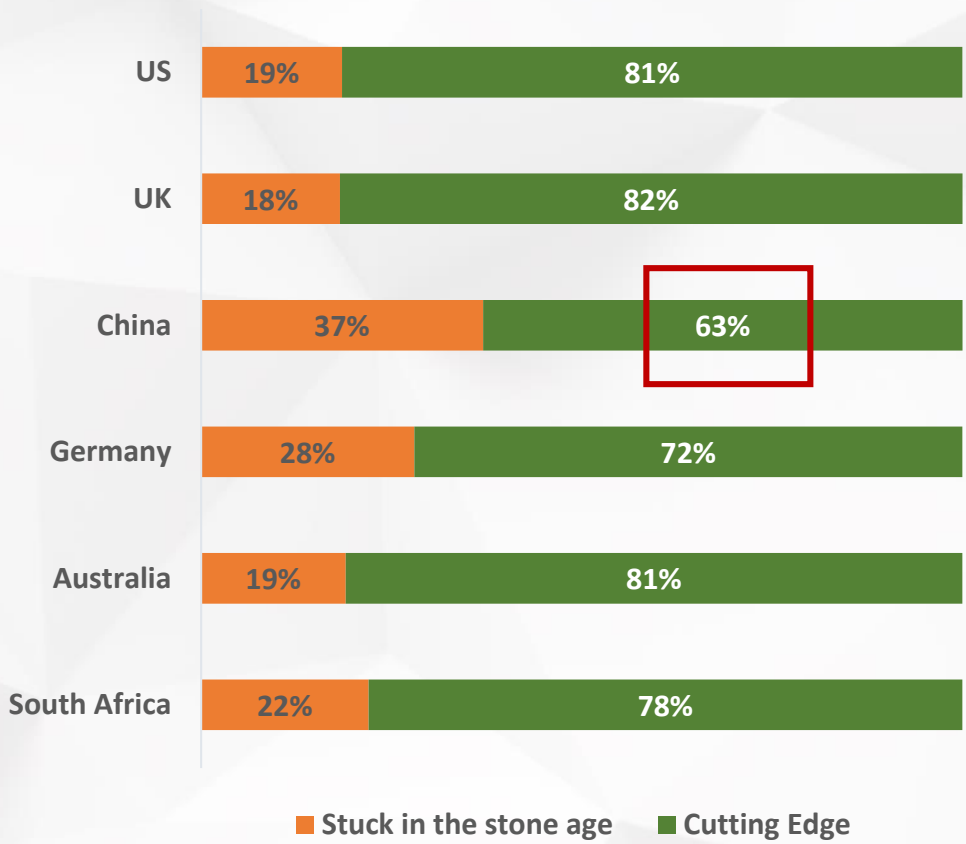
Would the behaviours of the executive leaders of a company in the Computing Devices industry influence your decision to support the brand or not?

- 65% of respondents in Germany felt that the behaviours of the executive leaders had a strong influence on their decision to support a brand or not.
- Nearly half of the respondents across the six market feel that the behaviours of executive leaders in the category has a strong influence on their decision to support a brand or not.

Percentages represent the percent of respondents who responded above or below the average emotional score by market.



# GLOBAL VIEW: **RATIONAL DRIVER**



## INNOVATION

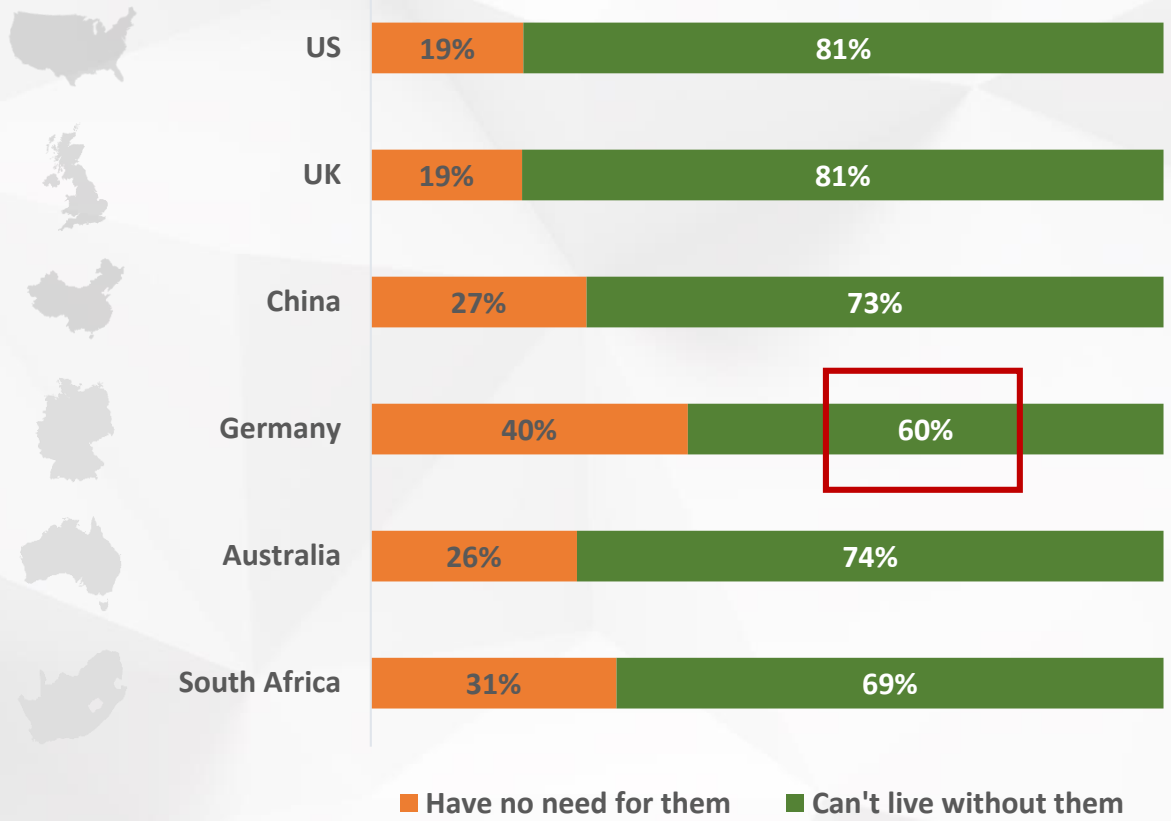
How innovative are Computing Device Companies?

- Majority of respondents in all markets felt that the category is “Cutting Edge”.
- China had the lowest percentage of respondents indicating that the category is “Cutting Edge” at 63%.

Percentages represent the percent of respondents who responded above or below the average emotional score by market.



# GLOBAL VIEW: **RATIONAL DRIVER**



## NECESSARY

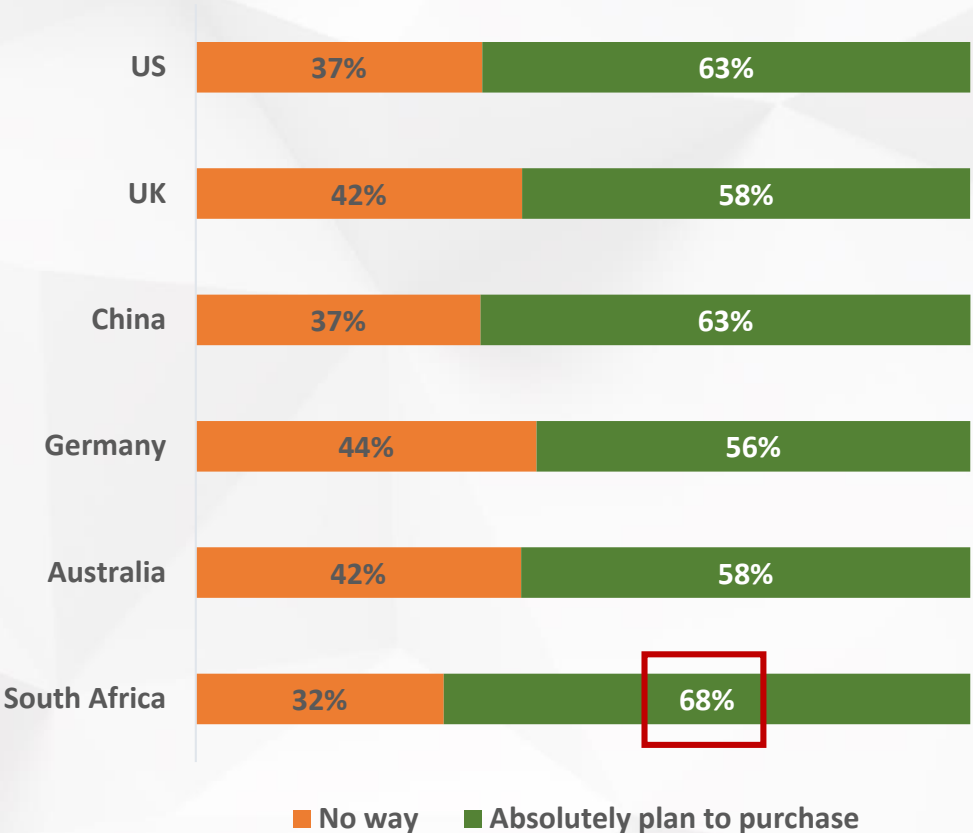
How necessary are Computing Device Companies to your life?

- Majority of respondents in all markets indicated a high necessity for Computing Device Companies.
- Respondents in Germany had the lowest percentage of “Can’t live without them” responses at 60%.

Percentages represent the percent of respondents who responded above or below the average emotional score by market.



# GLOBAL VIEW: **RATIONAL DRIVER**



## INTENT TO PURCHASE

How likely are you to purchase products or services from Computing Device companies in the next year?

- Respondents in South Africa had the highest response percentage for “Absolutely plan to purchase” at 68%.
- Nearly 60% of respondents indicated intent to purchase across all 6 markets surveyed.

Percentages represent the percent of respondents who responded above or below the average emotional score by market.

