

The 19th annual Sunday Times Top Brands Awards

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The results of the annual Sunday Times Top Brands survey was revealed at an awards ceremony last week. Now in its 19th year, the survey conducted by Kantar TNS on behalf of the *Sunday Times* continues to be the leading barometer of consumer sentiment towards brands. The 2017 survey polled 3,500 individuals, aged 18 years and older in both metropolitan and non-metropolitan areas of South Africa to establish a ranking of Top Brands in 32 consumer categories.

Similarly, 468 business leaders and decision-makers were interviewed to establish the Top Brands across 12 business categories. The Kantar TNS methodology used to establish brand ranking and category winners is based on the concept of relative advantage. This takes brand familiarity and awareness, the perceptions of users and non-users, as well as the size of brand presence in the market into account.

Sunday Times
TOPBRANDS



Consumer Grand Prix Awards

For the first time, the Consumer Overall Favourite Brand Grand Prix was awarded to KFC which improved on its third-place ranking last year. Samsung and Shoprite came in second and third place respectively.

Coca-Cola once again received the Consumer Green Award for the role it plays in preserving SA's environment and natural resources, as well as the Consumer Social Investment Award. Eskom and Shoprite featured in the top three positions of both Grand Prix rankings.

Business Grand Prix Awards

The Business Overall Favourite Brand remains Vodacom. The Apple iPhone crept into second place, knocking Discovery Health Medical Scheme down to third. Vodacom similarly performed well to receive the Business Green Award, followed by Nedbank and Woolworths in second and third place respectively.

In a category that was hotly contested, Vodacom also claimed top spot to win the Business Social Investment Award. Discovery Health Medical Scheme and Pick n Pay claimed second and third spot respectively.

The 2017 Robyn Putter Award for Creative Agencies

The prestigious Robyn Putter Award recognises the efforts of the creative agencies behind the winning brands. The winning agency is calculated on a points system based on the performance of its clients in the Sunday Times Top Brands survey. The 2017 recipient is Ogilvy & Mather. Reardon Sanderson, GM Sales & Marketing at Tiso Blackstar Group, says, “We tested the Sunday Times Top Brands survey and we were given a resoundingly positive endorsement in terms of ratings for awareness and value that the survey offers to marketers and advertisers alike. In an environment where there is a proliferation of awards, Top Brands is still regarded as the industry standard, where being awarded at Sunday Times Top Brands holds serious currency for brands.”

The results

While 2017 saw a downgrade of the South African economy and some pressure on food prices through rand fluctuations, South Africans seem to have, through some dramatic spending changes last year, found a way to manage their budgets better and create space for some additional luxuries here and there. We see usership in beauty and cosmetics, alcohol, electronic appliances and sit down restaurants increase. However, this is not just irresponsible spending, we also see an increase in the ownership of insurance policy ownership (both long and short term). In the business survey we see most category usage flat – to be expected in a business environment. We do, however, see a significant shift out of business newspaper usage – likely a shift to reading on online platforms. In addition, where they can, businesses are reducing expenses with travel and car hire usage.

The results of all categories were published in the Top Brands supplement accompanying the Sunday Times on 1 October 2017.

Overview and summation of the consumer categories

Alcoholic coolers

Smirnoff entered the top-ranked brands for the first time this year and took top spot pushing Red Square and Brutal Fruit into second and third respectively. Bernini and Bacardi also entered the rankings and were placed fourth and fifth.

Alcoholic spirits

The Johnny Walker masterbrand retained the top spot in this category. Hennessy suffered a loss to both Jameson and Amarula moving down two spots from second to fourth. Chivas Regal dropped out of the top 10 as did Glenfiddich and Bells in favour of some strong vodka brands: Absolut, Smirnoff and Cruz.

Beauty and cosmetics

Nivea remains a strong winner in this category, Dawn's inclusion in the category shot them to second place, ousting Ponds into third. Lux and Dove enter the top 10 for the first time this year, as do Clinique and Maybelline – at the expense of Garnier, Johnson & Johnson, Woolworths and L'Oréal.

Beers

Heineken moves to top spot after a number of years in second place. SABMiller holds onto the top 10 tightly with Castle Light, Clack Label, Castle Lager and Hansa filling spots two-five. Flying Fish moves up from 10th place last year to sixth place in 2017.

Cars

Mercedes Benz takes back top spot this year from Toyota which drops down three spots to fourth place. BMW and VW take second and third position respectively. The remainder of the group largely unchanged – including no change for Ford, despite a tough year in the media.

Cell phones

Samsung held on to its top spot in 2017 followed by Nokia and iPhone in second and third. Huawei's activity over the last year has paid off as they move up from seventh place to fourth.

Cereals

In its second year as a Top Brands category, we see the old favourites at the top of the ranking. Kellogg's Corn Flakes moves up from second to first switching places with Weet-Bix. Futurelife and ProNutro creep up the list a couple of places while Kellogg's Rice Krispies and Ace instant porridge join the top 10 this year.

Chilled processed meats

No changes in top four brands for this category, Enterprise, Simply Chicken, Eskort and Renown keeping their positions from last year. Mielie-Kip and Bokkie climbing up to fifth and sixth place respectively.

Ciders

Small but consistent category with no change vs 2016. Hunters in top spot, followed by Savanna and Redd's.

Condiments and sauces

A new category in 2017. Top honours go to All Gold in first place, Crosse & Blackwell in second, Nola in third and Mrs Balls in fourth followed by Nando's in sixth.

Daily Newspapers

The *Daily Sun*, the *Sowetan*, and *Isolezwe* take first, second and third place – no change from 2016. *The Times* moves up from sixth to fifth place with *Pretoria News* dropping off the top 10 to make room for *New Age*.

Domestic airlines

Interestingly, South African Airways retains its place in first place, British Airways takes second place with Kulula and Mango in third and fourth place respectively.

Electronic goods

Once again the category is dominated by the top three performers Samsung, LG and Sony. Samsung continues to hold its leadership due high usage and ratings. LG and Sony are again second and third place respectively. Apple makes a dramatic entry this year into fourth spot.

Energy Drinks

A new category this year. Red Bull takes top honours followed by Powerade, Play and Energade.

Essential foods

Tastic's dominance of the category maintain, keeping it in top spot followed by Albany and White Star. Fatti's and Moni's moves up one spot from fifth to fourth and Blue Ribbon moves up from ninth to eighth.

Fast food restaurants

KFC maintains its lead and is noted as being the most loved brand by both users and non-users who rate it highly. Nando's holds its position at second place while Debonairs and Steers stay in third and fourth place respectively. Fishaways drops out of the top 10 and Something Fishy enters in ninth place.

Frozen Chicken

Rainbow is still South Africa's number one brand, with Goldi coming in at second and I&J taking third place.

Grocery stores

Shoprite takes first place for the fourth successive year, followed by Pick n Pay and Spar. Game drops out of the top 10 and is replaced by Boxer.

Kitchen appliances

The top three brands have remained consistent from 2016, with Defy taking first place, Samsung in second followed by LG in third place. Kelvinator is once again in fourth place while KIC edges out Whirlpool for fifth place.

Long-term insurance

Old Mutual maintains its prime first position. Alexander Forbes showing a dramatic improvement moving from tenth place last year to second place this year. Avbob also showing strong growth moving from fifth to third place. Hollard dropping down from third to ninth.

Loyalty programmes

Pick n Pay Smart Shopper remains South Africa's top loyalty programme followed by Clicks Club Card and Edcon's Thank U. eBucks comes in fourth place followed by Discovery Vitality who enter the category for the first time.

Milk

Clover still dominates the category in first place, followed by Parmalat in second and Ultra-Mel in third place. Bonnita moves from sixth place in 2016 to fourth in 2017 with First Choice moving up three spots from eighth to fifth.

Petrol stations

Engen continues to top the category while BP reclaims second place from Shell. Sasol comes in at fourth place with Total remaining in fifth place.

Retail banks

Capitec remains in first place, with FNB in second place. ABSA shifts into fourth behind Standard Bank, pushing Nedbank into fifth place.

Short-term insurance

OUTsurance makes a dramatic leap from fourth place to first in 2017 and last year's winner, Santam, drops to ninth place. Hollard remains in second place followed this year by First for Women.

Family sit-down restaurants

For the fourth consecutive year, Spur holds the top spot while Wimpy is pushed from second into third place by

McDonald's. Rocomamas makes its first entry into the category in seventh place.

Telecommunications providers

For the fifth year running, Vodacom and MTN take the top two spots respectively. Telkom Mobile moves into third place from fifth.

Tinned foods

The category has remained stable with Koo once again being the outright category leader with high user and non-user ratings, followed by Lucky Star and All Gold respectively. Bull Brand and Enterprise come in at fourth and fifth place respectively as they did in the previous two years.

TV service providers

SABC 1 took back top spot from DStv Compact in 2017. DStv premium dropped from third place to fifth making room for e.tv and SABC 2 to take third and fourth respectively.

Micro lenders

For the fourth year running, Capitec holds its number one ranking. Capfin comes in second and African Bank follows in third place.

Water

Another new category in 2017. BonAqua takes top spot followed by aQuelle, Valpre, and Nestle.

Weekly newspapers

The Sunday Times takes first place again and *Soccer Laduma* remains in second place. *City Press* ranks third once again.

Overview and summation of the business categories

Business newspapers

Business Day continues to be the top newspaper for business people. *The Sunday Times* has remained in second place and *The Mail & Guardian* remains in third place for business news. There has however been a dramatic drop in usership of the category implying the continued switch to online formats.

Car hire

Results for the car hire category have remained stable once again, with Avis leading the category, followed by Europcar and Budget in third place. First Car rental has joined the category in sixth place.

Cars owned

Contrary to the results in the consumer survey, Toyota takes the top spot while Mercedes Benz drops to second place. Land Rover sees a dramatic drop from sixth to ninth while Ford drops out of the top 10 completely (from seventh place).

Cell phones owned

iPhone has remained in the top spot, followed, again, by Samsung. Huawei has moved from fifth to third spot while Sony, Blackberry, and Nokia drop out completely.

Corporate banks

FNB wins the corporate banking category for the fifth consecutive year. Investec comes in at second place while Nedbank drops from third place to fifth – beaten by Standard Bank and Capitec.

Domestic airlines

British Airways has remained in first place, with Kulula in second and Mango in third place. Fly Safair replaces SAA for the fourth spot.

Investment companies

The fifth time winner, Allan Gray takes the top position propelled by positive ratings and increased usage. Investec remains in second place while Coronation takes third place from Old Mutual.

Long-term insurance

Old Mutual sees a dramatic drop from first place to sixth place, creating space for a new leader in Discovery Life followed by Momentum and Liberty in second and third respectively.

Medical aid companies

Discovery once again wins the category. Momentum sustains second position. Fedhealth holds onto third place with Bonitas in fourth place.

Short-term insurance

The top three has remained consistent in this category as Santam continues to hold its positioning driven by a large user base, followed by OUTsurance and Mutual & Federal third in the category. Discovery Insure climbs to fourth place from sixth.

Telecommunications providers

The top two spots remaining stable with Vodacom and MTN leading. Telkom takes third spot from Cell C who drops down to sixth place.

Alcoholic Spirit brands

Whiskey is the preferred choice for South African business leaders. Glenmorangie takes top honours followed by Glenfiddich, Jameson and then Johnny Walker in fourth.

The Grand Prix awards

Consumer's overall favourite brand in South Africa for 2017

A significant shift from last years' winners – we have a new number one in KFC – up from third place last year. Followed by Samsung electronics and Shoprite.

Business overall favourite brand in South Africa for 2017

Way ahead of the rest is this year's winner of the overall favourite Business brand, Vodacom sitting comfortably in first place once again. Apple iPhone creeps ahead into second place, bumping Discovery Health into third place.

The Consumer Green Award

This year Coca Cola has again taken the role of the company that does the most to look after SA's environment and natural resources. Eskom is in the top three this year at second place, while Shoprite has moved down to third place this year, from second place in 2016.

The Business Green Award

Vodacom's message for a greener South Africa has put them at the top of the list for this award. In a close second we have Nedbank and Woolworths in third place.

The Consumer social investment award

Coca-Cola reigns supreme when it comes to the community award, followed by Shoprite in second place and Eskom in third place.

The Business social investment award

From a business perspective this award was closely contested, but Vodacom got the nod from other business when it comes to the company that is most committed to social investment in SA. Discovery and Pick n Pay come in second and third place respectively.

The Robyn Putter award

To build a winning brand you need to connect with people and their emotions. This challenge is not an easy one, and in keeping with tradition, to honour the memory of one of advertising industry's greats, we are delighted to award the Robyn Putter Award for the 2017 creative agency of the year to Ogilvy & Mather.

To find out more or how Kantar TNS can help your brand stand out, contact Caroline Mills at caroline.mills@tnsglobal.com.

***The Sunday Times* and Kantar TNS methodology for the Top Brands survey**

The approach looks at a brand's penetration in the marketplace, while also examining its relative strength among its users and its relative attraction among non-users – the concept of relative advantage. This was accomplished by asking three questions:

1. Brands used within a defined time period (this period differed for each category).
2. Brands with which people were familiar enough to rate them on a 10-point scale.
3. The actual rating of all those brands on a 10-point scale.

From this, an index score for each brand is generated from three variables: the actual usage of a brand in a specified time period, the rating it receives from its users relative to others in the category, and the rating it receives from those non-users aware of it, also relative to competitors in the category. The non-user rating carries only half the weight of the user rating in the final algorithm.

The final index can be thought of as the brand's standing in both the marketplace and in people's minds. This is in line with the current thinking that brand equity is a function of both Power in the Mind and Power in the Market, coupled with the view that one must always take the attraction of competitors into account in any assessment of brand equity.

How a brand can win

A winner occurs in one of three situations:

1. If it is big *and* rated above average by both its users and its nonusers.
2. If it is truly big, but perhaps only rated as average by its users and nonusers.
3. It is smaller, but very well loved by its users, and is strongly aspired to by its non-users.

As most brands have a good sense of their relative size, this approach allows more useful marketing insights to be gained. A brand can assess by how much more, or less, its users rate it compared with the average – an indication of the relative commitment people have to a brand. Similarly, by looking at the non-user ratings, some idea of a brand's relative "pull" among its non-users is gained.

The algorithm is not proprietary to either the *Sunday Times* or to Kantar TNS, but is in the public domain.

The sample

The consumer sample is representative of all South African adults, 18 years and older. The total sample for 2017 was 3,500, with 2,500 interviews in metro areas of South Africa and 1,000 interviews in non-metro areas. The final results have been weighted to represent the population according to StatsSA 2015 mid-year population estimates. Interviews were conducted in home, face-to-face. The business sample consisted of 468 C-level business decision-makers (CEOs, CFOs, COOs) from organisations of all sizes. The business component moved from being conducted via Kantar TNS's CATI system to online self-complete.

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