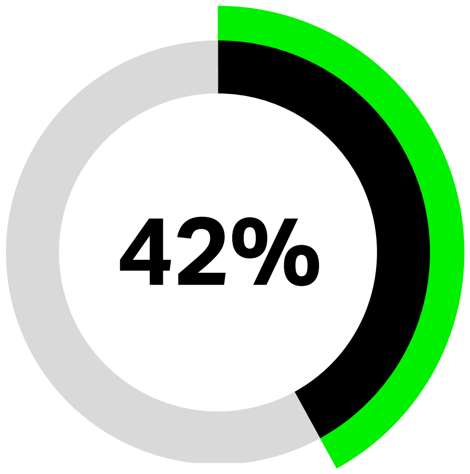
Agnostic buyers

Need-based considerations ahead of purchasing



I just purchase what I need without thinking deeply about the brand it comes from.

Opportunity

Largest segment of global consumers, huge opportunity for brands of all sizes to nurture and convert. Most open to persuasion.

Key findings

Purchase indifference

45% find it hard to differentiate between various brand options available to them.

Price sensitive

In Africa & Middle East, 24% are strugglers (have and continue to suffer financially), and 22% will buy whatever brand is on promotion. To them, affordability is highly associated with small brands.

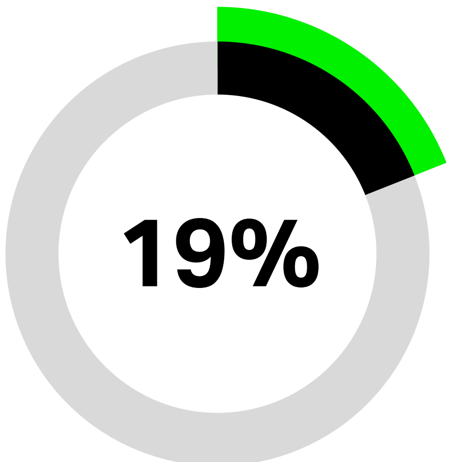
Market highlights of agnostic buyers in Africa & Middle East

Egypt	**62%**
Saudi Arabia	**40%**
South Africa	**42%**
UAE	**45%**
Turkey	**26%**

NielsenIQ

Unintentional small buyers

Slight small brand preference, only when it's convenient



I don't go out of my way to buy specific brands, but all things being equal, I'd prefer to buy small brands.

Opportunity

A cohort for small and medium businesses to nurture and remind. They have potential to develop deeper loyalties if smaller brands can resonate with them.

Key findings

Cautious majority

In Africa & Middle East, 30% are cautious (not impacted financially, but cautious with spending), need help justifying value of their purchase choices.

Resonance matters

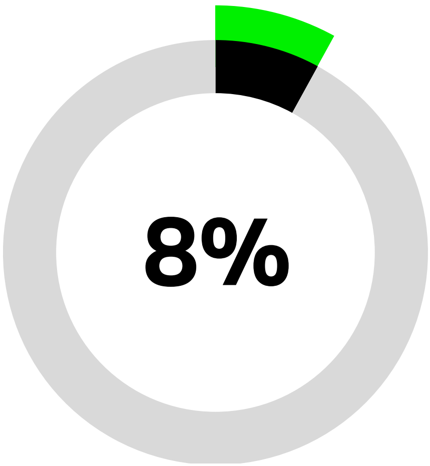
To them, brands that have environmental or social benefits that resonate personally are important and highly associated to that typically offered by smaller brands.

Market highlights of unintentional small buyers in Africa & Middle East

Egypt	**12%**
Saudi Arabia	**20%**
South Africa	**17%**
UAE	**24%**
Turkey	**24%**

Exclusive small brand buyers

Most likely to directly seek out small/medium brands for purchase



I prefer to buy small brands over purchasing from large manufacturers or retail brands.

Opportunity

The "sweet spot" of consumer preferences for small and medium businesses to protect and defend their share of.

Key findings

Sustainable interests

Top attributes regular south by exclusive small brand buyers are environmentally friendly, natural/ healthy, sustainably produced, clean label.

Local supporters

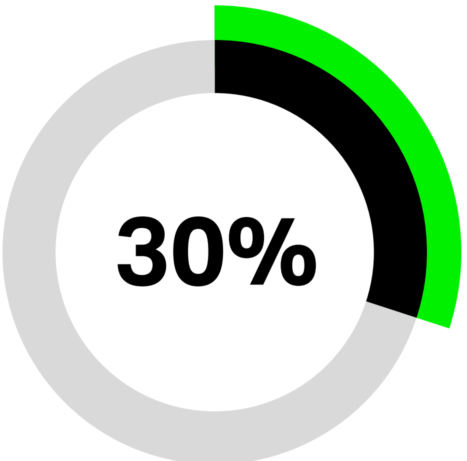
In Africa & Middle East, 82% are say it's important that brands support local communities, and highly associate this to what they know and expect of smaller brands.

Market highlights of exclusive small brand buyers in Africa & Middle East

Egypt	**6%**
Saudi Arabia	**10%**
South Africa	**6%**
UAE	**13%**
Turkey	**9%**

Exclusive large brand buyers

Most likely to directly seek out large brands for purchase



I prefer to buy well known large brands whenever I can.

Opportunity

The “sweet spot” of consumer preferences larger businesses to protect and defend their share of.

Key findings

Expect top quality

In Africa & Middle East, 90% of respondents say it’s important that brands have superior quality compared to competitive brands they could have bought. Notoriety and brands are the most well-known is also highly important.

Direct communication

67% of the respondents like when brands contact them directly in an informal or personal way. 64% like knowing a brand’s story, origin or reason for being.

Market highlights of exclusive large brand buyers in Africa & Middle East

Egypt	**20%**
Saudi Arabia	**30%**
South Africa	**35%**
UAE	**17%**
Turkey	**41%**