# hellomoto

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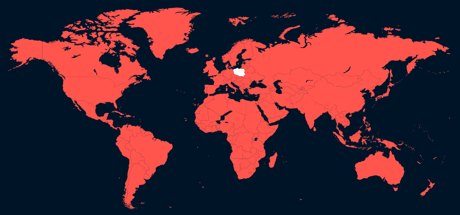
# MBG BRANDPULSE OVERVIEW

## OBJECTIVES:

- Track Motorola and competitor brand standing in the broad consumer market in the Poland
- Understand top-of-mind awareness, preference and perception of key smartphone brands & sub-brands

Online 20-25 min survey conducted in April 2022*



**Poland**

[last wave April '21]

- Market rep sample (n=1205) of smartphone owners in the Poland
- Ages 18-55 - all price tiers
  - HT: >Zt 2000
  - MT :Zt 1000-1999
  - LT: Zt 450-999 (<Zt. 450 not included)
- Purchase in past 2 years + 3 months intenders of 2-3 year old phone

## AREAS COVERED:

**BRAND METRICS**
*Unaided & Aided:*
Awareness
Consideration
Purchase Intent

**BRAND IMAGE**
Imagery perceptions across 17 attributes & personality traits across key smartphone brands

**SUB-BRAND AWARENESS**
*Aided*
moto, razr, edge,
Link to master brand

**MODEL AWARENESS**
*Aided*

**BRAND INTEREST & REASONS**
*Aided*
Aspects that piqued interest in main brands

**BRAND NPS**
Loyalty & availability analysis to understand brands at risk of churn (acquisition opportunities)

**AD HOC AREAS:**
Motorola Affiliation with Lenovo

*Fieldwork conducted [redacted]
PLEASE SEE 'NOTES' PAGE FOR ACTUAL QUESTION ON EACH PAGE
MOTOROLA IS NOT IDENTIFIED AS THE STUDY SPONSOR

[redacted]

# BrandPulse Poland
# Agenda


1 **SUMMARY HIGHLIGHTS**

2 BRAND METRICS

3 BRAND IMAGERY PERCEPTIONS

4 BRAND PERSONALITIES

5 SUB-BRAND AWARENESS

6 MODEL AWARENESS

7 RECENT BRAND INTEREST

8 BRAND NPS & LOYALTY

9 APPENDIX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# Results Summary - Poland BrandPulse (April 2022)

- Overall Samsung stands out with top metrics across the board but with accelerating competitive intensity as unaided metrics increases for Motorola, along with Apple, Xiaomi, Oppo, Realme and Vivo.

- Motorola unaided brand awareness increased 5 pts YoY to 35% with increases among females (+5pts) and ages 35-44 (+9 pts), while unaided consideration also increase 3 pts to 11% as did aided purchase intent (+2 pts) to 4%. Motorola metrics are generally similar across the tiers, with slightly higher consideration in the LT and MT.

    - Motorola stands out for *good user experience, battery life and good value – also techy & mature* but lower overall associations relative to competition – low on *recommended*, *stylish* and *modern*.

- Samsung has top metrics all around, with 43% preference followed by Apple, which increased unaided awareness to 71% (+8 pts) and preference to 22% (+7 pts).

    - Samsung has strongest imagery for high quality, trustworthy, camera, user experience, techy, professional, and dependable followed by Apple - uniquely *stylish* and *cool*, also *high quality, design, camera, & innovative* – both are modern, and lower for *battery life* and *offering a good value.*

- Xiaomi, Oppo, Realme and Vivo metrics increased YoY, while Huawei is on the decline. Xiaomi sits ahead of Motorola with strong conversion from awareness to consideration and Oppo is now mostly on par. Realme and Vivo, while increasing, are at lower awareness levels today.

    - Xiaomi, Realme and Oppo are perceived as *modern* and *youthful*, also a *good value* (with Motorola), but also for *appealing design* and *innovative*; Xiaomi also for *good battery* (with Motorola).

- Overall **Moto** and **Edge** awareness is similar – with **Moto** having high linkage to Motorola, while **edge** just slightly more associated with Samsung vs. Motorola. **Razr** awareness is very low but has decent linkage to Motorola among those aware.

- Motorola model awareness is low, with Motorola edge particularly low for a relative premium device and declined YoY.

- Relatively high knowledge in Poland of Motorola's affiliation with Lenovo. Unaided 42% spontaneously mention Motorola as part of Lenovo; when aided, this rises to 57%.

[redacted]

# Considerations – Poland BrandPulse

1. **Continue to drive awareness of Motorola -** Motorola has made nice gains in awareness over the past 2 years, catching Xiaomi, but Oppo is on our heels, with UBA now on par with Motorola. Realme and Vivo metrics are also increasing YoY.

2. **Strengthen Motorola brand desirability/perception to increase consideration & purchase interest:** Relative to all top brands, Motorola's conversion to consideration (and purchase intent) lags key competitors as does its brand image.

3. **Increase Motorola perception of a modern, stylish & innovative brand, offering a great camera experience:** need to strengthen Motorola's brand standing in these key areas of competitor strengths, as today Motorola's associations are low.

4. **Drive up awareness of both Moto and edge sub-brands:** Awareness of both brands is unchanged and relatively low, but Moto has strong linkage with Motorola (90%); edge has slightly higher association with Samsung (42%) vs. Motorola (35%).

5. **Employ tactics to increase Motorola recommendation:** especially at retail, from sales reps, which is a key source of awareness for Motorola phones from low to high tier

6. **Target Xiaomi, Huawei and Samsung for acquisition:** Given the combination of user base volume and repurchase intent, Huawei and Xiaomi have the greatest number of 'at risk' of churn, followed by Samsung. Today we pull mostly from Samsung & Huawei, then Xiaomi. However, we will need to get on the radar of these brand owners as few of these brand owners have Motorola in their consideration set (on average 3 brands are considered).

7. **Retention remains critical:** While our retention rate has increased over the past 2 years (now 22%), Motorola has a large 'at risk' base (estimated 43%) with most churning to Samsung and recently Xiaomi. Samsung also has higher unaided consideration among Motorola owners than Motorola.

# Main Findings by Section


1 SUMMARY HIGHLIGHTS

2 BRAND METRICS

3 BRAND IMAGERY PERCEPTIONS

4 BRAND PERSONALITIES

5 SUB-BRAND AWARENESS

6 MODEL AWARENESS

7 RECENT BRAND INTEREST

8 BRAND NPS & LOYALTY

9 APPENDIX


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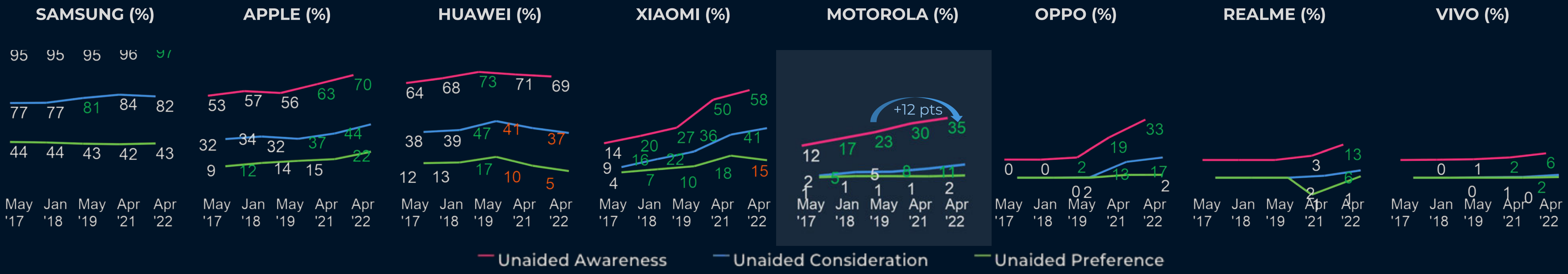
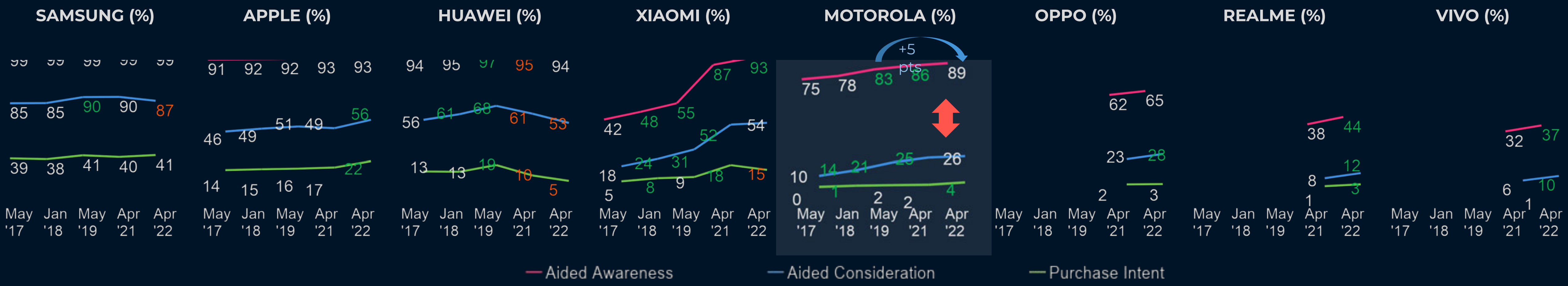
# TRENDED BRAND METRICS

Motorola metrics continue to improve YoY, reaching the highest levels on both unaided & aided metrics – must continue to create desire/interest in Motorola to achieve stronger conversion to consideration & purchase intent. Xiaomi awareness & consideration strengthened YoY, but preference & purchase intent declined. Apple continues to strengthen, and Oppo saw a sharp rise in both unaided & aided. Realme and Vivo also improved but sits at a lower level today. Huawei metrics on the decline.

## UNAIDED FUNNEL - recall




## AIDED FUNNEL - recognition




Source: BrandPulse Poland; May '17 (n=1008), Jan '18 (n=1010), May '19 (n=1207); Apr'21 (n=1206) ; Apr'22 (n=1205)
Green/Red: Significantly different from previous wave at 95% CI

Click here to view trended brand metrics of other brands

# BRAND METRICS BY TIER

Motorola metrics are similar across the tiers – with slightly higher consideration in the MT and LT, yet with aided purchase intent increasing YoY in the MT and HT. Apple and Samsung are on par in the HT, with Samsung dominating the MT and LT (however, Apple sees gains in the LT YoY) – and with Xiaomi and Apple vying for #2 (in the MT and LT). On unaided awareness, Oppo & Motorola are on par, but Oppo has stronger conversion to consideration than Motorola.

## HIGH TIER (A) > Zt 2000

| | UNAIDED FUNNEL | | | AIDED FUNNEL | | |
|---|---|---|---|---|---|---|
| | AWARENESS (%) | CONSIDERATION (%) | PREFERENCE (%) | AWARENESS (%) | CONSIDERATION (%) | PURCHASE INTENT (%) |
| Samsung | 97 | 80 | 38 | 98 | 84 | 36 |
| Apple | 79 BC | 62 BC | 39 BC | 94 | 74 BC | 39 BC |
| Huawei | 72 | 40 | 7 | 91 | 52 | 7 |
| Xiaomi | 54 | 31 | 6 | 93 | 42 | 5 |
| Motorola | 33 | 7 | | 88 | 23 | 3 |
| Oppo | 33 | 14 | 1 | 65 | 25 | 2 |
| Realme | 10 | 5 | 1 | 38 | 9 | 2 |
| Vivo | 4 | 2 | 0 | 36 | 8 | 0 |

## MID TIER (B) Zt 1000-1999

| | UNAIDED FUNNEL | | | AIDED FUNNEL | | |
|---|---|---|---|---|---|---|
| | AWARENESS (%) | CONSIDERATION (%) | PREFERENCE (%) | AWARENESS (%) | CONSIDERATION (%) | PURCHASE INTENT (%) |
| Samsung | 98 | 84 | 48 AC | 100 A | 88 | 47 AC |
| Apple | 70 | 41 | 15 | 93 | 51 | 15 |
| Huawei | 67 | 38 | 5 | 94 | 53 | 5 |
| Xiaomi | 58 | 44 A | 16 A | 93 | 57 A | 16 A |
| Motorola | 35 | 11 | 2 | 89 | 27 | 4 |
| Oppo | 32 | 18 | 3 A | 68 C | 29 | 3 |
| Realme | 13 | 6 | 2 | 46 A | 13 | 3 |
| Vivo | 6 | 2 | 0 | 39 | 9 | 1 |

## LOW TIER (C) Zt 450-999

| | UNAIDED FUNNEL | | | AIDED FUNNEL | | |
|---|---|---|---|---|---|---|
| | AWARENESS (%) | CONSIDERATION (%) | PREFERENCE (%) | AWARENESS (%) | CONSIDERATION (%) | PURCHASE INTENT (%) |
| Samsung | 96 | 81 | 39 | 99 | 86 | 38 |
| Apple | 66 | 38 | 20 | 93 | 52 | 20 B |
| Huawei | 70 | 35 | 5 | 94 | 55 | 5 |
| Xiaomi | 60 | 43 A | 17 A | 92 | 56 A | 18 A |
| Motorola | 34 | 13 A | 3 | 88 | 25 | 5 |
| Oppo | 35 | 17 | 3 A | 62 | 28 | 4 |
| Realme | 14 | 7 | 1 | 44 | 12 | 2 |
| Vivo | 5 | 3 | 1 | 34 | 11 | 1 |

Source: BrandPulse Poland; Apr'22 (HT n=245; MT n=536; LT n=424)

**Green**/**Red**: Significantly different from previous wave at 95% CI; Letters indicate sig differences among tiers

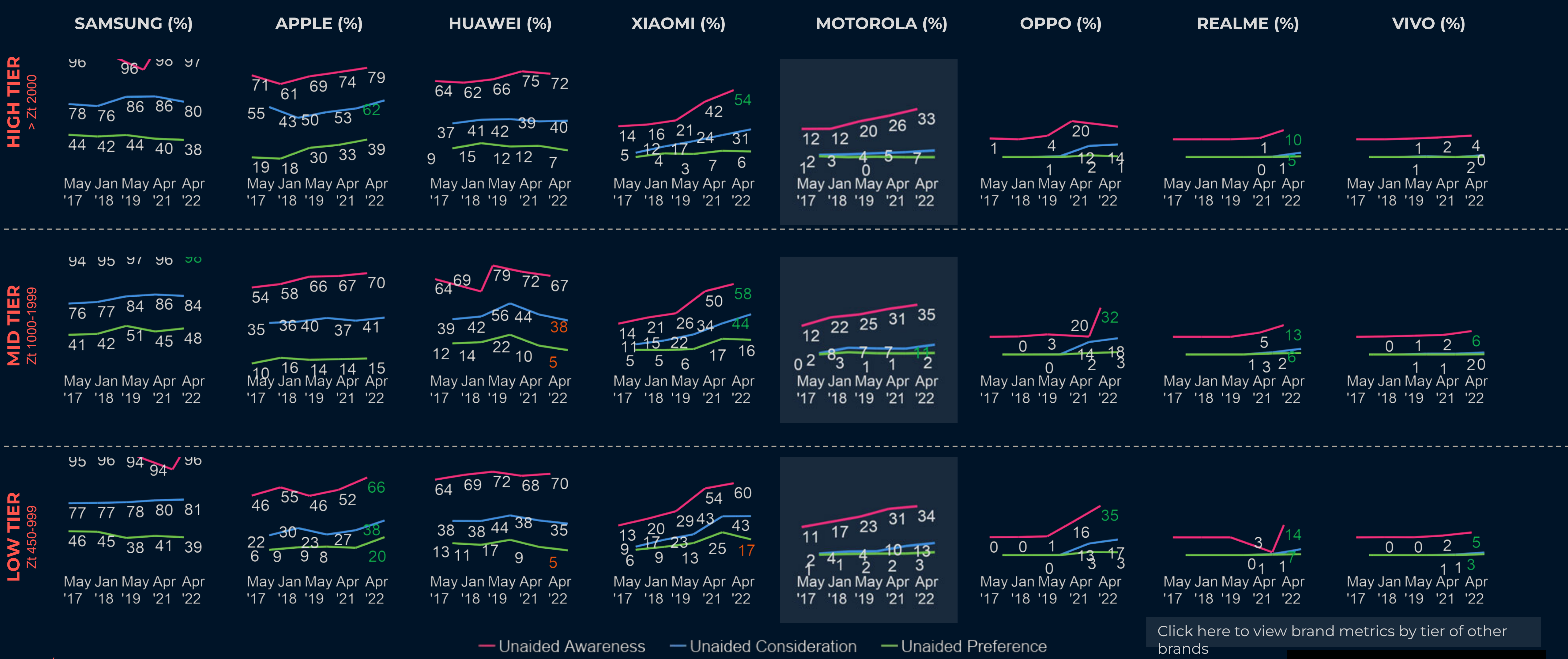
Click here to view brand metrics by tier of other brands

[redacted]

# TRENDED UNAIDED BRAND METRICS BY TIER

Unaided, Motorola gains 4pts on consideration in the MT. Apple sees gains on all metrics in the LT, and on consideration in HT. Xiaomi increase in the HT and MT, while Oppo and Realme see increases across all tiers. Huawei unaided metrics soften across all tiers.

**UNAIDED FUNNEL -** recall

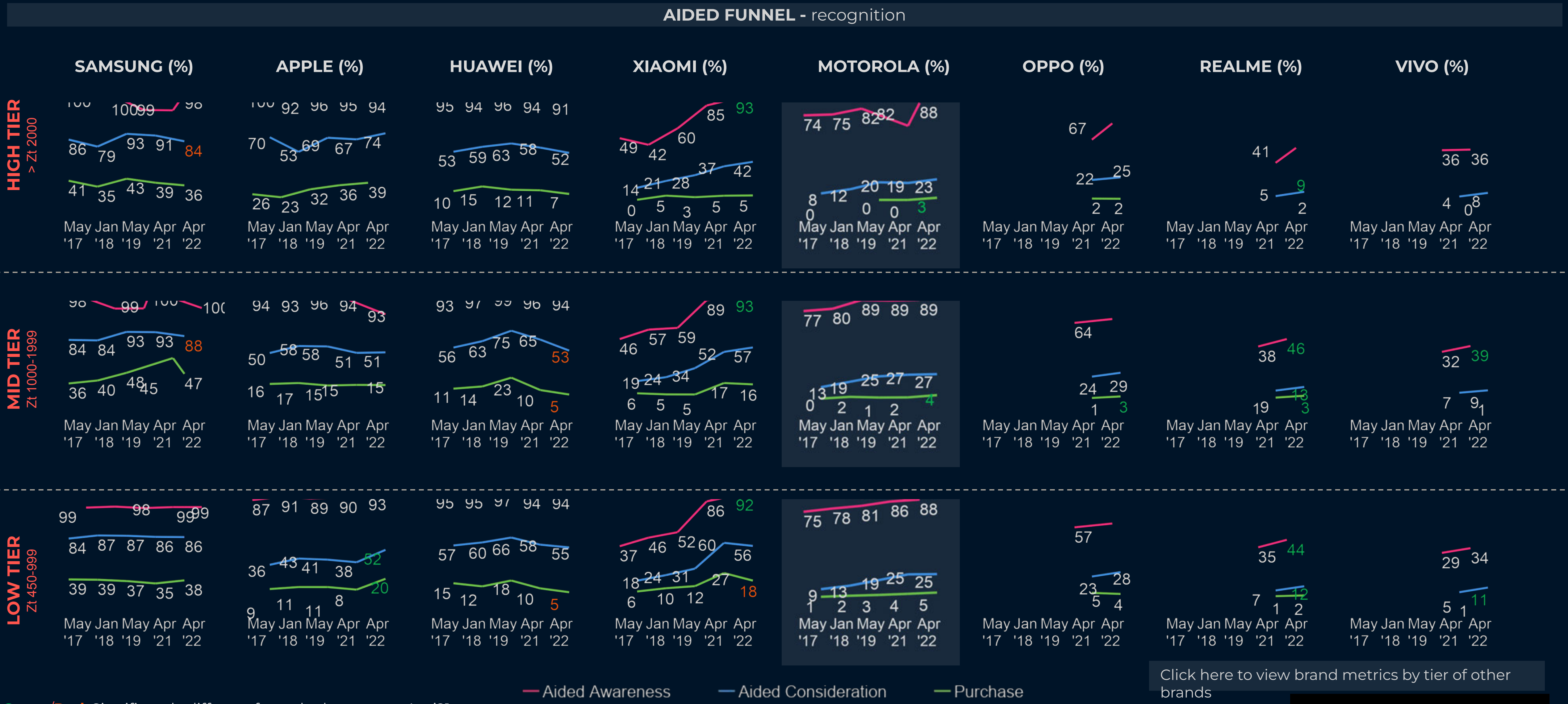



Click here to view brand metrics by tier of other brands

**Green**/**Red**: Significantly different from the last wave – Apr'21 - at 95% CI

# TRENDED AIDED BRAND METRICS BY TIER

When aided with a list, Motorola sees slight increases in purchase in both the HT (+3pts) and MT (+2pts). Xiaomi gained on awareness across price tiers, however, purchase intent declined sharply among LT (where Vivo and Apple see strong gains). Realme strengthened across all metrics in the MT and LT.




Click here to view brand metrics by tier of other brands

**Green**/**Red**: Significantly different from the last wave – Apr'21 - at 95% CI

# MOTOROLA BRAND METRICS BY SUBGROUPS

Motorola unaided metrics (except awareness) are highest among Brand Skeptics, LT and males. Compared to last year, UBC increased with ages 35-34, MT, Tech Centrics and males. Purchase intent increased among males, Status Shoppers, both HT and MT and among Apple and Huawei owners.

| | UNAIDED FUNNEL | | | AIDED FUNNEL | | |
|---|---|---|---|---|---|---|
| | AWARENESS (%) | CONSIDERATION (%) | PREFERENCE (%) | AWARENESS (%) | CONSIDERATION (%) | PURCHASE INTENT (%) |
| Total | 35 | 11 | 2 | 89 | 26 | 4 |
| 18-24 | 29 | 7 | 1 | 89 | 18 | 4 |
| 25-34 | 31 | 9 | 1 | 86 | 25 | 4 |
| 35-44 | 39 | 14 | 4 | 90 | 30 | 5 |
| 45-55 | 42 | 16 | 2 | 89 | 31 | 4 |
| Male | 34 | 14 | 3 | 86 | 31 | 5 |
| Female | 35 | 9 | 1 | 91 | 21 | 3 |
| Status Shoppers | 37 | 10 | 2 | 92 | 32 | 6 |
| Design Focused | 27 | 11 | 1 | 79 | 23 | 2 |
| Brand Believers | 38 | 10 | 1 | 89 | 20 | 4 |
| Tech Centrics | 38 | | 2 | 94 | 32 | 3 |
| Deal Seekers | 34 | 9 | 3 | 88 | 22 | 5 |
| Brand Skeptics | 35 | 16 | 7 | 89 | 26 | 7 |
| High Tier | 33 | 7 | | 88 | 23 | 3 |
| Mid Tier | 35 | 11 | 2 | 89 | 27 | 4 |
| Low Tier | 34 | 13 | 3 | 88 | 25 | 5 |
| Samsung | 34 | 11 | 1 | 87 | 26 | 1 |
| Apple | 29 | 5 | | 90 | 12 | 6 |
| Huawei | 34 | 14 | 2 | 88 | 25 | 5 |
| Xiaomi | 32 | 6 | 0 | 86 | 23 | 1 |
| Motorola | 92 | 68 | 41 | 100 | 92 | 57 |
| Oppo | 35 | 6 | | 94 | 26 | |
| Realme | 30 | 9 | | 97 | 33 | |

Source: BrandPulse Poland; Apr '22 (n=1205)
**Green**/**Red**: Significantly different from previous wave at

Significant difference between Overall Market vs. each sub-group at 95% CI

# BRAND PERCEPTIONS

**User experience, camera experience & appealing design** are the most common associations. **Motorola** stands out for *good user experience, battery life and good value* – but lower overall associations. **Samsung** has strongest imagery for high quality, trustworthy, camera, user experience, followed by **Apple** - uniquely *stylish*, also *high quality, design, camera, & innovative* – both are lower for *battery life* and *value*.

INCREASING ASSOCIATION

| | MARKET PERCEPTIONS OF BRANDS | | | | | | | | | BRAND OWNER PERCEPTIONS | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| +/- 4 or more relative to brand average | Samsung | Apple | Xiaomi | Realme | Huawei | Oppo | Motorola | Vivo | *Statement Average* | Samsung | Apple | Xiaomi | Huawei |
| Good user experience | 9 | -1 | 5 | 6 | 7 | 7 | 6 | 6 | 40 | 6 | 3 | 1 | 6 |
| Good camera experience | 8 | 7 | 3 | 4 | 9 | 4 | 3 | 4 | 40 | 5 | 8 | 2 | 2 |
| High quality products | 13 | 15 | 2 | 1 | 4 | 1 | 1 | 0 | 39 | 9 | 10 | 2 | 1 |
| Appealing design | 0 | 7 | 8 | 4 | 7 | 4 | 2 | 3 | 39 | -4 | 3 | 4 | 5 |
| A trustworthy brand | 11 | 4 | 4 | 0 | 0 | 0 | 2 | 0 | 37 | 8 | 8 | 4 | 4 |
| Embraces diversity | 5 | -5 | 4 | 4 | 2 | 5 | 2 | 4 | 37 | 2 | -14 | 6 | -6 |
| Innovative brand | 0 | 6 | 4 | 4 | 0 | 3 | -2 | 2 | 37 | -2 | 4 | 0 | 2 |
| Innovative features that are useful | 4 | 3 | 7 | -1 | 1 | 1 | 1 | 1 | 37 | 3 | 4 | 8 | 3 |
| Good value for money | -15 | -26 | 14 | 11 | 3 | 9 | 4 | 6 | 35 | -12 | -36 | 16 | 3 |
| Great battery life | -6 | -10 | 7 | 3 | 0 | 0 | 6 | -2 | 34 | -7 | -19 | 6 | 7 |
| Recommended | 4 | -2 | 5 | -1 | -1 | 0 | -4 | -7 | 34 | 0 | 1 | 5 | -12 |
| A stylish brand | 0 | 13 | -9 | -4 | -3 | -3 | -4 | -2 | 33 | -2 | 7 | -11 | -2 |
| Reliable (does not crash/freeze) | -7 | 3 | -9 | -6 | -2 | -4 | 0 | -1 | 31 | -3 | 6 | -11 | 0 |
| Happy to be seen with | 0 | 2 | -6 | -4 | -4 | -7 | -4 | -4 | 31 | 3 | 8 | -5 | -2 |
| Durable (will last a long time) | -5 | -1 | -8 | -5 | -4 | -6 | -3 | -1 | 30 | -1 | -1 | -5 | 1 |
| Protects my privacy* | -12 | -2 | -18 | -7 | -10 | -5 | -2 | -3 | 27 | -10 | -2 | -22 | -12 |
| Brand you love | -8 | -12 | -11 | -8 | -10 | -8 | -6 | -7 | 26 | 5 | 10 | 0 | 2 |
| *Brand Average* | 58 | 48 | 43 | 30 | 29 | 24 | 23 | 21 | | 75 | 82 | 67 | 57 |
| *Avg. # of statements ticked* | 10 | 8 | 7 | 5 | 5 | 4 | 4 | 4 | | 13 | 14 | 11 | 10 |

**Higher relative association**

**Lower relative association**

Source: MBG BrandPulse Poland – Apr '22; Brand Aware base: Samsung n=1151, Apple n=1087, Xiaomi n=1070, Realme n=479, Huawei n=1077, Oppo n=746 , Motorola n=1067, Vivo n=416

Brand Owner base: Samsung n=427, Apple n=196 Xiaomi n=247, Huawei n=105, Realme n=29*, Oppo n=29* , Motorola n=37* , Vivo n=5*

Less than 50 base size brands are not shown in Brand Owners Perceptions

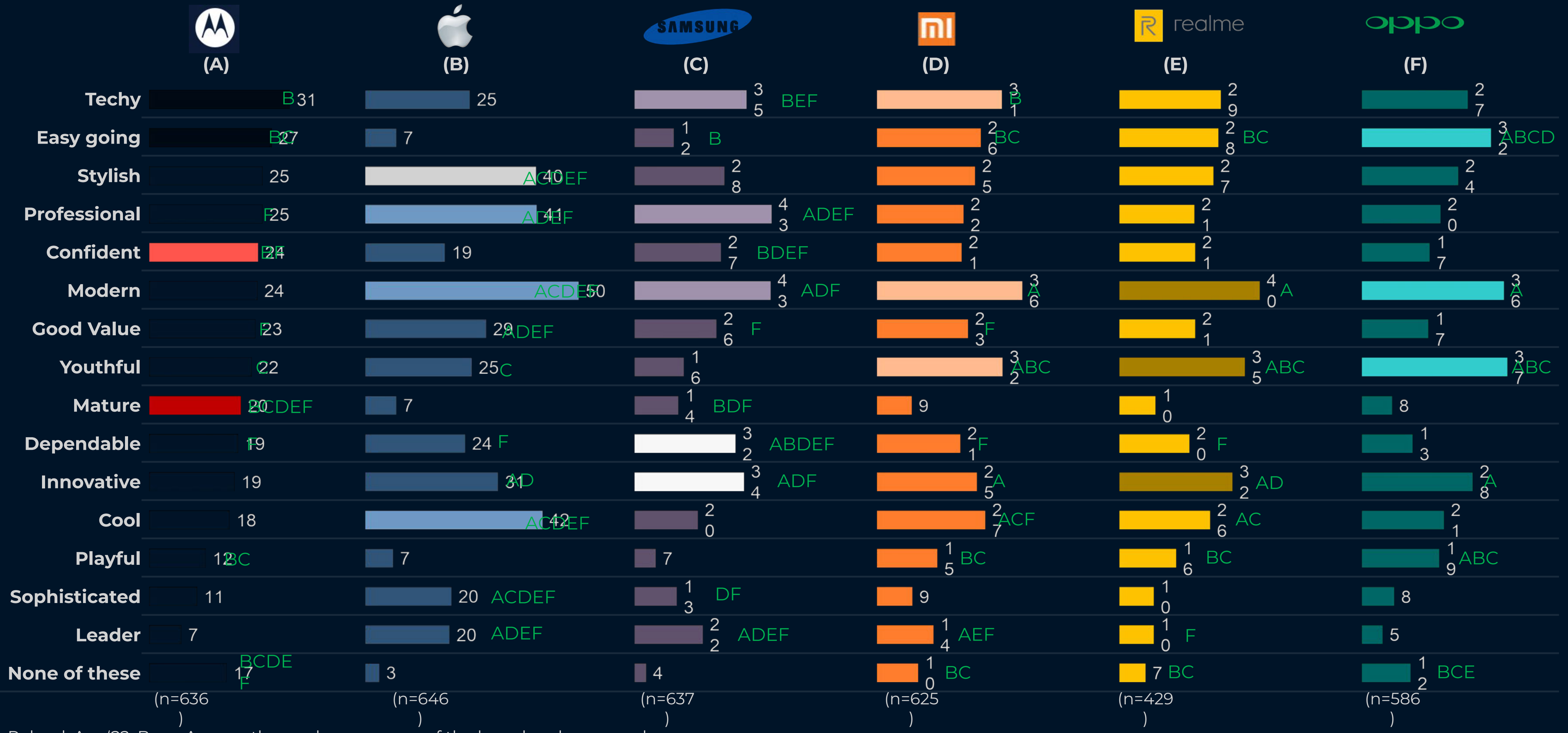
*New statement this wave

[redacted]

# BRAND PERSONALITY

Motorola' strongest personality trait is *techy* and *easy going*, also *mature* – with the highest number of 'none of these'. All other brands are considered *modern,* particularly Apple which is also the most *stylish* and *cool* (uniquely). Samsung stands out on *techy, professional* and *innovative* and *dependable*. Xiaomi, Realme and Oppo considered *youthful*.

| Summary: | Techy, easy going, mature | Modern, cool, professional, stylish | Modern, professional, techy, dependable, innovative | Modern, youthful, techy | Modern, youthful, innovative | Youthful, modern, easy going |
|---|---|---|---|---|---|---|




Source: BrandPulse Poland; Apr '22; Base: Among those who are aware of the brand and answered the question

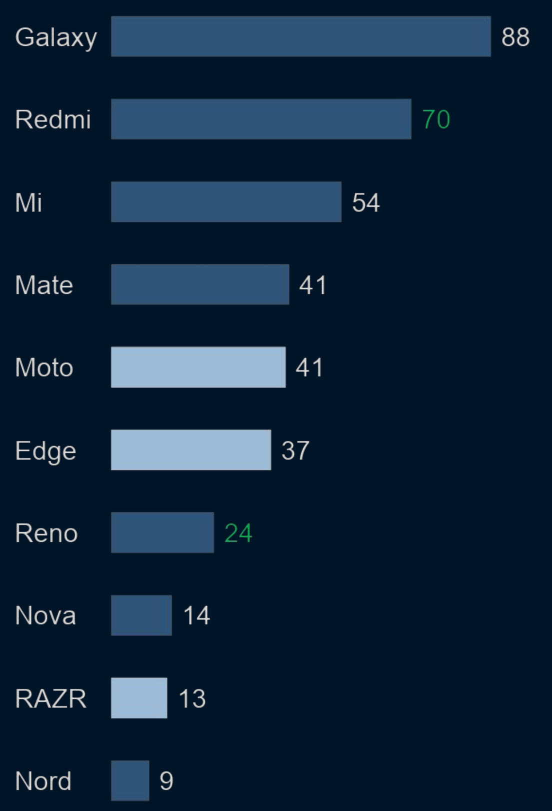
Letter indicates significantly difference between the brands at 95% CI

[redacted]

# SUB-BRAND AIDED AWARENESS

Redmi and Reno aided awareness increased YoY, all others are unchanged. Overall **Moto** and **Edge** awareness is similar – with **Moto** having high linkage to Motorola, while **edge** just slightly more associate the brand with Samsung vs. Motorola. **Razr** awareness is very low, but has decent linkage to Motorola. **Implications:** Must not assume broad awareness of Razr and recognize the low overall awareness of edge and Moto, meaning these sub-brands cannot stand alone and must be reinforced with Motorola (via wordmark and/or Batwing).

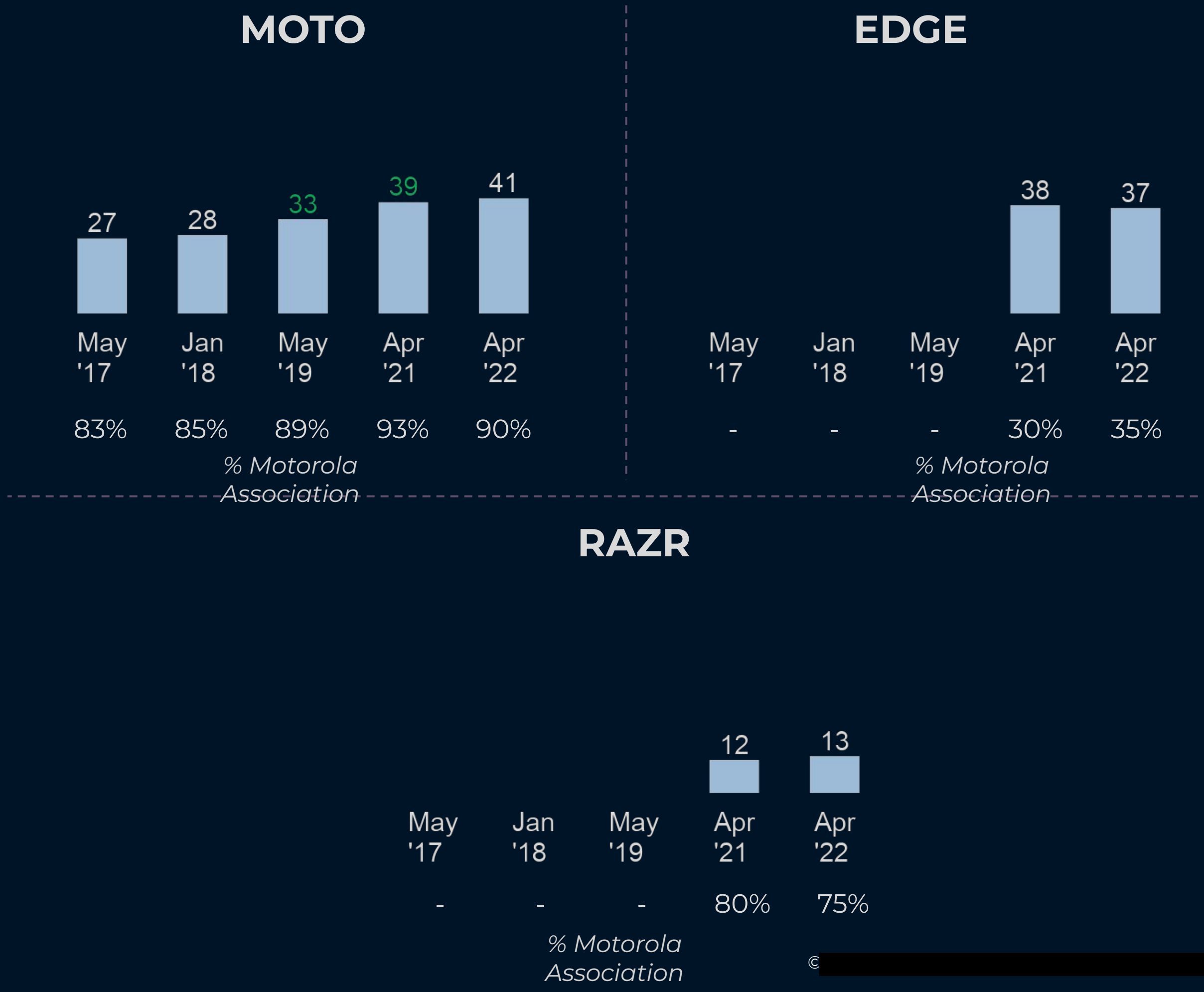
**SUB BRAND AWARENESS (AIDED) (%)**




**BRAND ASSOCIATION (%)**

| | |
|---|---|
| Samsung | 97 |
| Xiaomi | 82 |
| Xiaomi | 93 |
| Huawei | 75 |
| Motorola | 90 |
| Samsung<br>Motorola | 42<br>35 |
| Oppo | 76 |
| Huawei | 54 |
| Motorola | 75 |
| Oneplus | 63 |

**SUB BRAND AIDED AWARENESS (%) – (% show Motorola association)**




Source: BrandPulse Poland; Apr '22 (n=1205)
**Green**/**Red**: Significantly different from previous wave at 95% CI

# PROFILE OF MOTO, RAZR, AND EDGE SUB BRAND AWARE CONSUMERS

Awareness of all sub brands are higher with Status Shoppers while lower with Deal Seekers. **Edge** Awareness is higher with Males and Tech Centrics as well but lower with ages 45-55, Females, Design Focused, and LT. While awareness of Razr is higher with Males and HT, it is lower with ages 18-24, Females, and Xiaomi Owners. Moto awareness is higher with Tech Centrics and Motorola owners but lower with Design focused. Status Shoppers are most likely to link Motorola with these sub-brands (except Moto)


Source: BrandPulse Poland; Apr '22 ; Base: Those aware of Moto (n= 489), Edge (n= 448), Razr (n= 158)

*Indicates low base size

**Green**/**Red**: Significant difference between Overall Market vs. each sub-group at 95% CI

[redacted]

# SMARTPHONE MODEL AWARENESS (aided)

Samsung (Galaxy S22), Apple (iPhone 13), along with Xiaomi models have highest recognition – iPhone model awareness higher with ages 18-24 and HT, while Xiaomi Redmi model awareness decrease YoY. Galaxy Z Flip 3 awareness increased and is significantly higher than the Motorola Razr 5G (but increased with HT). Motorola edge model awareness is lower YoY and Moto g50 and Moto e7 power are higher with females.

| MODEL AWARENESS (AIDED) (%) | | GENDER (%) | | AGE (%) | | | | PRICE SEGMENT (%) | | |
|---|---|---|---|---|---|---|---|---|---|---|
| | | Male (n=606) | Female (n=599) | 18-24 (n=298) | 25-34 (n=359) | 35-44 (n=370) | 45-55 (n=178) | High Tier (n=245) | Mid Tier (n=536) | Low Tier (n=424) |
| Samsung Galaxy S22 | 64 | 69 | 60 | 63 | 64 | 68 | 60 | 69 | 66 | 59 |
| Apple iPhone 13 | 60 | 62 | 58 | 77 | 61 | 55 | 43 | 73 | 55 | 60 |
| Xiaomi Redmi Note 10 | 53 | 52 | 53 | 62 | 53 | 46 | 49 | 51 | 54 | 52 |
| Xiaomi Redmi Note 11 | 48 | 50 | 45 | 53 | 50 | 41 | 46 | 47 | 47 | 49 |
| Apple iPhone SE | 41 | 45 | 37 | 57 | 42 | 33 | 30 | 55 | 35 | 40 |
| Xiaomi Mi 11 Lite | 41 | 45 | 37 | 41 | 42 | 43 | 36 | 37 | 45 | 38 |
| Samsung Galaxy Z Flip 3 | 37 | 42 | 31 | 38 | 37 | 37 | 33 | 47 | 36 | 31 |
| Samsung Galaxy M12 | 36 | 34 | 37 | 36 | 35 | 38 | 33 | 31 | 37 | 36 |
| Xiaomi Mi 10T | 31 | 35 | 27 | 32 | 35 | 29 | 25 | 27 | 34 | 30 |
| Realme 9 | 29 | 33 | 26 | 31 | 33 | 27 | 24 | 22 | 32 | 30 |
| Oppo Reno 5 | 27 | 28 | 25 | 23 | 29 | 24 | 34 | 24 | 30 | 24 |
| Oppo Reno 6 | 26 | 31 | 22 | 22 | 30 | 27 | 25 | 27 | 29 | 22 |
| Motorola Edge 20 | 20 | 23 | 18 | 15 | 19 | 24 | 26 | 19 | 22 | 19 |
| Realme GT | 18 | 23 | 12 | 19 | 20 | 16 | 13 | 17 | 17 | 18 |
| Motorola Moto g50 | 16 | 22 | 11 | 15 | 17 | 17 | 15 | 13 | 18 | 16 |
| Motorola Razr 5G | 14 | 17 | 10 | 7 | 14 | 18 | 15 | 19 | 13 | 12 |
| Motorola moto e7 power | 14 | 17 | 10 | 10 | 15 | 17 | 10 | 12 | 14 | 14 |
| Motorola Moto g200 | 13 | 14 | 13 | 12 | 13 | 13 | 17 | 11 | 14 | 13 |
| Vivo Y70 | 8 | 9 | 7 | 5 | 9 | 9 | 10 | 7 | 9 | 7 |
| Vivo Y20s | 8 | 9 | 6 | 5 | 8 | 10 | 5 | 7 | 8 | 8 |

Source: BrandPulse Poland; Apr '22 (n=1205)

**Green**/**Red**: Significantly different from Overall at 95% CI

**Green**/**Red**: at overall level indicates significance with similar models from last wave-Apr'21 at 95% CI

Please refer note section for details on Question text, price tier definition and Model comparison

# MODEL ASSOCIATIONS

Moto G and Xiaomi Redmi and Mi model series most strongly perceived as good value also for lower cost (along with Motorola edge). Galaxy S has strongest associations – fast performing, excellent camera, premium looking design, most advanced and reliable – areas that Motorola edge will want to convey to compete in the premium tier.

| +/- % of Series Average | Motorola Moto G | Motorola Edge | Samsung Galaxy A | Samsung Galaxy S | Xiaomi Redmi | Xiaomi Mi |
|---|---|---|---|---|---|---|
| Offers a good value for money | 9 | | 3 | -11 | 14 | 8 |
| Generally lower cost smartphones | 9 | 4 | -8 | -28 | 8 | 2 |
| Fast performing smartphones | 3 | 5 | 5 | 10 | 2 | 4 |
| Has long battery life | -1 | -0 | -2 | -3 | -1 | -1 |
| Has excellent camera quality | -3 | -2 | 2 | 10 | -2 | -1 |
| Reliable smartphones | -4 | -2 | 1 | 6 | -6 | -4 |
| Offers the latest & most advanced features | -4 | -3 | 0 | 8 | -5 | -1 |
| Have premium-looking product designs | -8 | -1 | -2 | 9 | -10 | -8 |
| Model Average across statements % | 32% | 33% | 44% | 55% | 39% | 39% |
| Average # of items ticked per phone | 2.5 | 2.6 | 3.5 | 4.4 | 3.1 | 3.1 |

Source: BrandPulse Poland; Apr '22;
Base: Moto G series (n=626), Motorola Edge (n=615), Galaxy A series (n=802), Galaxy S series (n=926), Redmi series (n=800), Mi series (n=715)

[redacted]

# REASON FOR INCREASED INTEREST IN BRANDS

*New launches (especially flagships), new technology innovations and friends/family talking about a new phone are* the top stated reasons for renewed interest in a brand, including the 22% interested in Motorola.

**BRANDS INTERESTED INCREASED (%)**


| REASON FOR INTEREST IN BRAND - <u>aided</u> | MOTOROLA (%) (n=261) | SAMSUNG (%) (n=440) | APPLE (%) (n=424) | XIAOMI (%) (n=265) | OPPO (%) (n=122) | REALME (%) (n=129) | VIVO (%) (n=71) |
|---|---|---|---|---|---|---|---|
| Recent appealing new product launches | **34** | **30** | 25 | **37** | **34** | **35** | **28** |
| Motorola Edge smartphone | 27 | | | | | | |
| Motorola Razr smartphone | 25 | | | | | | |
| Motorola Moto G series smartphone | 19 | | | | | | |
| Motorola Moto E series smartphone | 12 | | | | | | |
| Samsung Galaxy S22 smartphone | | **29** | | | | | |
| Samsung Galaxy Z flip 3 smartphone | | 21 | | | | | |
| Samsung Galaxy A series smartphone | | 15 | | | | | |
| Samsung Galaxy M series smartphone | | 10 | | | | | |
| Apple iPhone 13 smartphone | | | **46** | | | | |
| Apple iPhone SE smartphone | | | 13 | | | | |
| XIAOMI Mi 11 Lite smartphone | | | | 22 | | | |
| XIAOMI Redmi Note 11 smartphone | | | | 18 | | | |
| XIAOMI Mi 10T smartphone | | | | 11 | | | |
| OPPO Reno 6/5 series smartphone | | | | | **27** | | |
| OPPO A16 smartphone | | | | | 19 | | |
| GT series smartphone | | | | | | 23 | |
| Realme 8 smartphone | | | | | | 20 | |
| Vivo X series smartphone | | | | | | | 20 |
| Vivo Y series smartphone | | | | | | | 17 |
| New technology innovations | **31** | **32** | **38** | **34** | 24 | **32** | **42** |
| Friend/family/colleague showed/talked about a new phone | **28** | 22 | **33** | **34** | **28** | **25** | 25 |
| Read recent online articles about this brand | 22 | 12 | 15 | 22 | 19 | 21 | **30** |
| Have recently seen a lot of advertising and buzz for this brand | 12 | 12 | 7 | 12 | 22 | 24 | 18 |
| Other reasons | 4 | 3 | 5 | 4 | 1 | 1 | 4 |

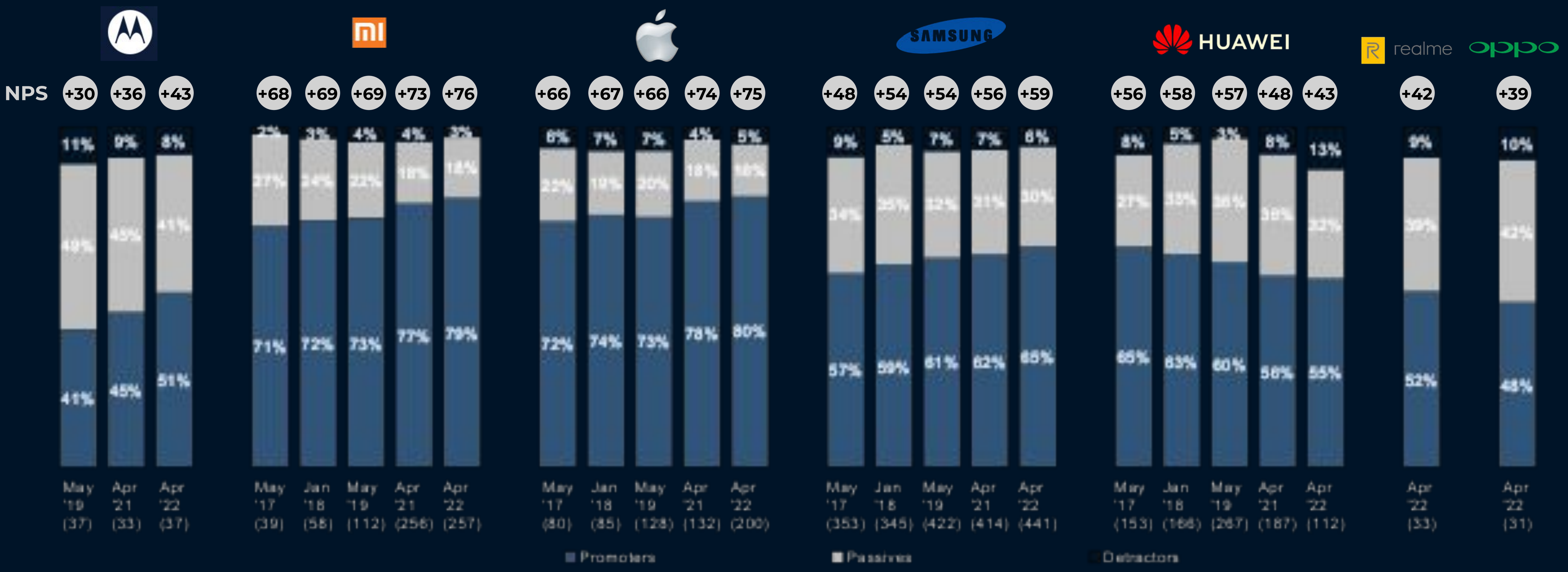
Top 3 are highlighted with bold and underlined
Question in notes

[redacted]

# BRAND NPS – among brand owners

Xiaomi and Apple have highest brand NPS, followed by Samsung. Motorola brand NPS is a step lower and on par with Huawei, Realme and Oppo.

BRAND NPS - among current brand owners



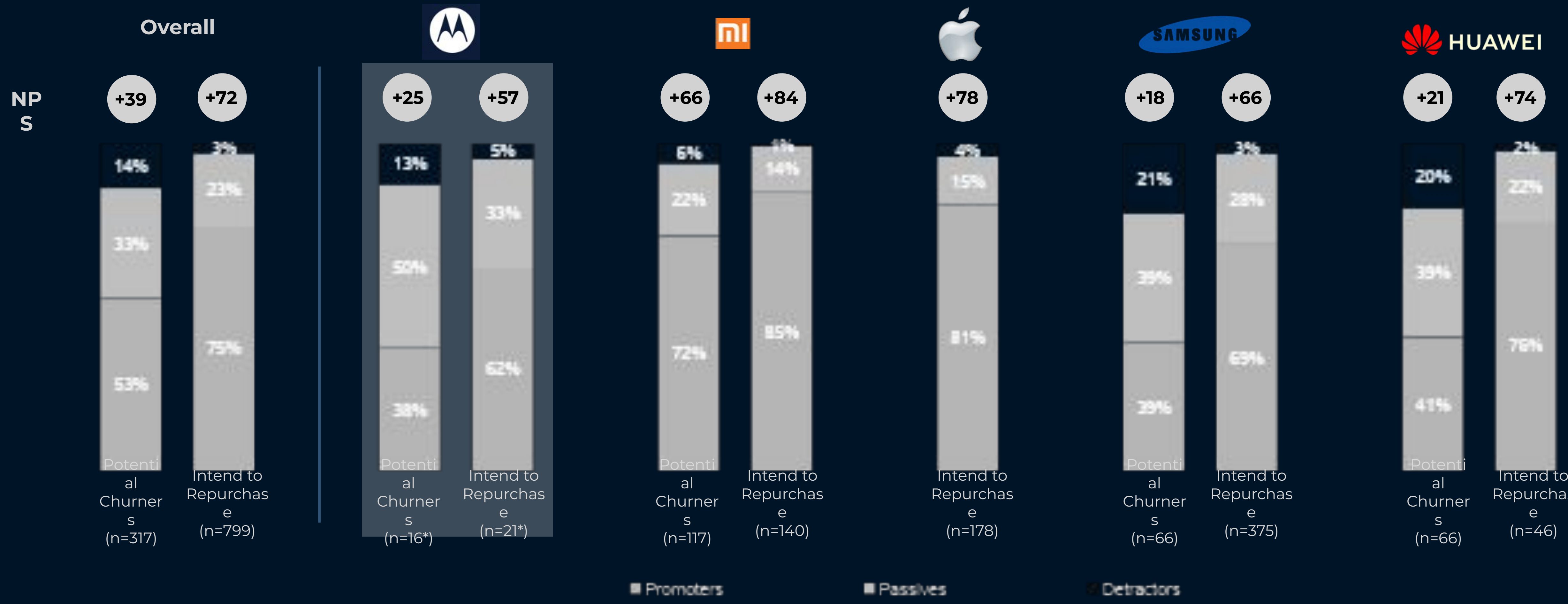

Caution: Not shown Vivo due to low base

[redacted]

# BRAND NPS BY REPURCHASE INTENT

Potential churners (those not stating they will purchase their current brand next) have lower Brand NPS/loyalty for all the brands. **For retention, it is critical to ensure strong product performance as we know from past research that product dissatisfaction is one of the top reasons for leaving a brand.**

**NPS among the brand owners and owners + intend to purchase**



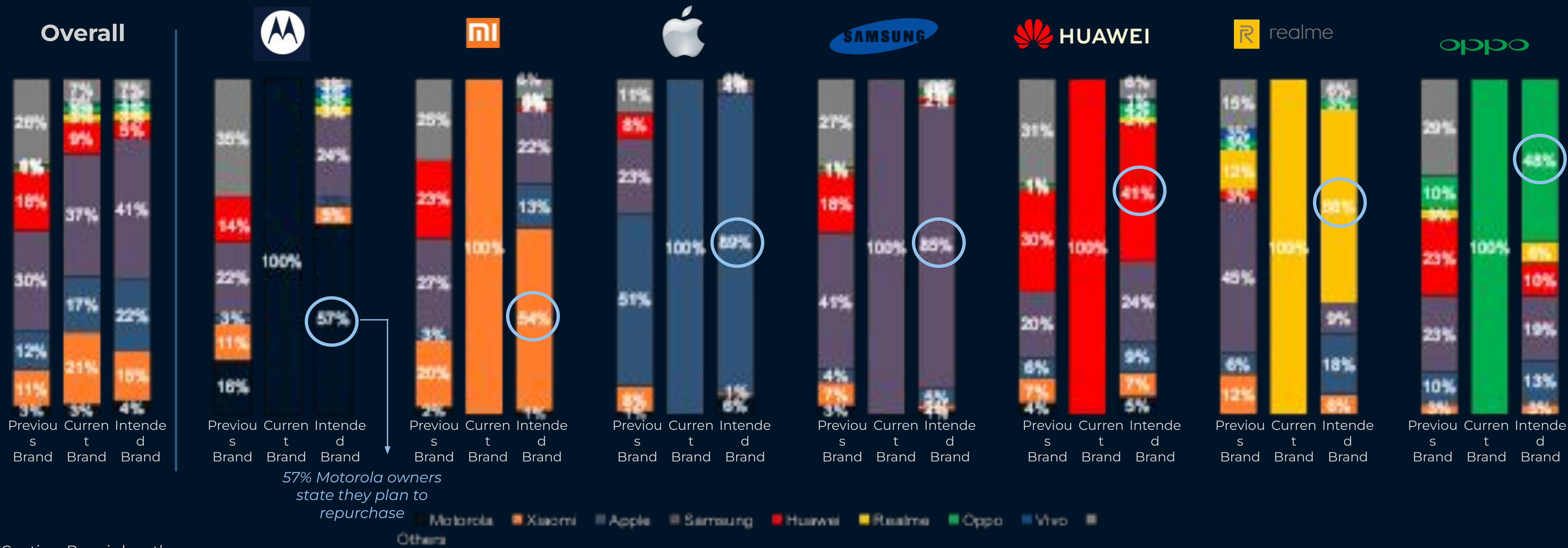

*Caution: Base is less than 30

[redacted]

# STATED BRAND REPURCHASE

Majority are intending to purchase Samsung (41%) or Apple (22%) for next phone – both brands with high stated loyalty – followed by Xiaomi. While low sample size, Motorola stated loyalty is similar to Xiaomi, Realme – all higher than Oppo and Huawei – with these brand defectors planning to churn to Samsung (mostly), then Apple.

**STATED BRAND LOYALTY**




*Caution: Base is less than 30
Source: BrandPulse Poland: Apr ‘22; Brand owners: Overall (n=1205) | Motorola (n=37) | Xiaomi (n=257) | Apple (n=200) | Samsung (n=441)
Huawei (n=112) I Realme (n=33) I Oppo (n=31)
Vivo (n=5*) not included (low sample)

[redacted]

# BRAND CONSIDERATION SET - % brand consideration by brand owned

About 3 brands are considered on average for next phone, with generally high consideration of their current brand, especially for Samsung & Apple. Need to get on competitor owner's radar as fewer competitor brand owners are considering Motorola (the 4th / 5th choice).

CAUTION: low sample size for Motorola, Oppo & Realme

## UNAIDED CONSIDERATION

| OWNERS | Samsung | Apple | Huawei | Xiaomi | Motorola | Oppo | Realme |
|---|---|---|---|---|---|---|---|
| Consider Current Brand | 96% | 96% | 68% | 78% | 68% | 65% | 52% |
| Samsung | | 69% | 82% | 76% | 73% | 71% | 76% |
| Apple | 37% | | 30% | 32% | 24% | 26% | 48% |
| Huawei | 37% | 32% | | 37% | 24% | 32% | 15% |
| Xiaomi | 33% | 24% | 35% | | 35% | 19% | 33% |
| Motorola | 11% | 5% | 14% | 6% | | 6% | 9% |
| Oppo | 18% | 10% | 18% | 16% | 19% | | 18% |
| Realme | 5% | 1% | 8% | 6% | 5% | 6% | |
| Vivo | 1% | 1% | 4% | 3% | - | - | 6% |
| Avg. no. of brands considered | 3.1 | 2.8 | 3.2 | 3.1 | 3.4 | 2.7 | 3.1 |

## AIDED CONSIDERATION

| OWNERS | Samsung | Apple | Huawei | Xiaomi | Motorola | Oppo | Realme |
|---|---|---|---|---|---|---|---|
| Consider Current Brand | 100% | 100% | 86% | 90% | 92% | 90% | 82% |
| Samsung | | 72% | 86% | 82% | 81% | 77% | 82% |
| Apple | 53% | | 46% | 44% | 30% | 39% | 52% |
| Huawei | 54% | 44% | | 52% | 41% | 48% | 45% |
| Xiaomi | 46% | 30% | 51% | | 49% | 35% | 58% |
| Motorola | 26% | 12% | 25% | 23% | | 26% | 33% |
| Oppo | 27% | 14% | 29% | 29% | 24% | | 39% |
| Realme | 10% | 4% | 14% | 11% | 14% | 16% | |
| Vivo | 10% | 4% | 13% | 10% | 8% | 10% | 15% |
| Avg. no. of brands considered | 4.4 | 3.4 | 4.5 | 4.4 | 4.5 | 4.1 | 5.2 |

Source: BrandPulse Poland; Apr '22; Brand owners: Samsung (n=441) | Apple (n=200) | Huawei (n=112) | Xiaomi (n=257) | Motorola (n=37) | Oppo (n=31) | Realme (n=33)

[redacted]

# ACQUISITION OPPORTUNITY | CHURN RISK FOR MOTOROLA

Considering the strong loyalty of Samsung & Apple, their ‘at risk’ rates are relatively low (15% and 11%) – but the sheer size of Samsung’s user base produces a large volume opportunity. Xiaomi and then Huawei have decent base sizes with a large % of at-risk customers (46% and 59% respectively, also produce large targetable bases. Motorola needs to protect from churn to Samsung and Xiaomi.


**Churn threat for Motorola** – from FB analysis, we lose mostly to Samsung (28%) & Xiaomi (24%) – the 2 brands with about half the installed base share.

**Acquisition Opportunity**
Xiaomi, Huawei and Samsung have greatest volume for the taking. Today we gain new customers mostly from Samsung (30%), Huawei (26%) and then Xiaomi (18%)

***Indicates low base**

****Availability analysis –** uses NPS and brand intention (stated loyalty) to estimate consumers at risk of churn (acquisition potential)
**SAFE** – Selected brand for next phone & Brand NPS promoter
**PASSIVE** – Selected brand for next phone & brand NPS passive & detractor
**AT RISK** – didn’t select brand for next phone

Volume estimated – assumes ~ 25M users in Poland – Samsung 30%, Xiaomi 24%, Huawei 15%, Apple 9%, Motorola 6% (1.5m), Oppo 5%, Realme 3% [redacted]

# ASSOCIATION OF SMARTPHONE BRANDS WITH LENOVO GROUP (Unaided and Aided)

Relatively high knowledge in Poland of Motorola's affiliation with Lenovo. Unaided 42% spontaneously mention Motorola as part of the Lenovo group. When aided, 57% pick Motorola from this list. Very few mentioned don't know (don't guess) at both aided and unaided level.

## UNAIDED

| | OVERALL (%) | GENDER (%) | | AGE (%) | | | | PRICE SEGMENT (%) | | |
|---|---|---|---|---|---|---|---|---|---|---|
| | | Male | Female | 18-24 | 25-34 | 35-44 | 45-55 | High Tier | Mid Tier | Low Tier |
| Motorola | 42 | 41 | 43 | 40 | 40 | 47 | 41 | 44 | 36 | 48 |
| Lenovo | 10 | 11 | 9 | 11 | 10 | 8 | 13 | 13 | 8 | 12 |
| Oppo | 4 | 3 | 6 | 4 | 5 | 4 | 2 | 3 | 6 | 3 |
| Xiaomi | 4 | 3 | 5 | 5 | 3 | 5 | 1 | 3 | 6 | 2 |
| Huawei | 3 | 4 | 2 | 2 | 3 | 4 | 5 | 2 | 3 | 4 |
| LG | 3 | 3 | 3 | 1 | 3 | 3 | 6 | 7 | 3 | 1 |
| Samsung | 3 | 1 | 5 | 5 | 2 | 2 | 2 | 4 | 3 | 2 |
| Realme | 3 | 3 | 2 | 4 | 4 | 1 | 1 | 4 | 2 | 4 |
| Nokia | 3 | 2 | 3 | 2 | 1 | 4 | 2 | 1 | 3 | 3 |
| Vivo | 3 | 2 | 3 | 3 | 3 | 2 | 1 | 2 | 4 | 1 |
| Philips | 2 | 3 | 1 | 3 | 2 | 4 | - | 1 | 2 | 3 |
| Sony | 2 | 3 | 2 | 3 | 2 | 3 | 1 | 2 | 3 | 2 |
| Alcatel | 2 | 4 | 1 | 1 | 3 | 2 | 2 | 2 | 3 | 2 |
| IBM | 2 | 2 | 3 | 1 | 2 | 2 | 3 | 1 | 3 | 1 |
| Oneplus | 2 | 2 | 2 | 3 | 2 | 2 | 2 | 2 | 3 | 1 |
| Redmi | 2 | 2 | 2 | 2 | 3 | 1 | 5 | 2 | 3 | 2 |
| Vibe | 1 | 1 | 0 | - | 1 | - | 1 | 1 | 1 | - |
| POCO | 1 | 0 | 1 | 1 | - | 1 | 1 | - | 1 | 0 |
| Galaxy | 0 | 0 | - | 1 | - | - | - | - | 0 | - |
| Others | 0 | 1 | - | - | 1 | 1 | - | - | 0 | 0 |
| Don't know/Not sure | 10 | 11 | 10 | 9 | 13 | 9 | 10 | 10 | 11 | 10 |

## AIDED

| | OVERALL (%) | GENDER (%) | | AGE (%) | | | | PRICE SEGMENT (%) | | |
|---|---|---|---|---|---|---|---|---|---|---|
| | | Male | Female | 18-24 | 25-34 | 35-44 | 45-55 | High Tier | Mid Tier | Low Tier |
| Motorola | 57 | 53 | 62 | 60 | 51 | 56 | 68 | 58 | 59 | 55 |
| Vivo | 9 | 10 | 8 | 10 | 9 | 10 | 3 | 12 | 9 | 7 |
| Oppo | 6 | 8 | 5 | 6 | 9 | 7 | 1 | 6 | 9 | 3 |
| Realme | 5 | 7 | 3 | 3 | 8 | 5 | 3 | 7 | 6 | 3 |
| Samsung | 5 | 4 | 5 | 5 | 6 | 4 | 4 | 5 | 6 | 4 |
| Huawei | 3 | 2 | 4 | 5 | 2 | 2 | 3 | 2 | 1 | 6 |
| Apple | 2 | 3 | 2 | 6 | 1 | 2 | 1 | 2 | 2 | 3 |
| Xiaomi | 2 | 2 | 2 | 1 | 3 | 3 | - | 3 | 2 | 1 |
| None of these | 4 | 6 | 2 | 2 | 3 | 5 | 3 | 3 | 4 | 4 |
| Don't know/not sure | 16 | 17 | 15 | 11 | 19 | 16 | 18 | 14 | 14 | 20 |

Source: BrandPulse Poland; Apr '22 Unaided | Aided sample sizes (Total 595|610; male (311|295, Female 284|315, 18-24 141|157, 25-34 182|177, 35-44 186|184, 45-55 86|92; HT 112|133, MT 266|270, LT 217|207)

**Green**/**Red**: Significantly different from Overall at 95% CI

# BrandPulse Poland

1 **SUMMARY HIGHLIGHTS**

2 BRAND METRICS

3 BRAND IMAGERY PERCEPTIONS

4 BRAND PERSONALITIES

5 SUB-BRAND AWARENESS

6 MODEL AWARENESS

7 RECENT BRAND INTEREST

8 BRAND NPS & LOYALTY

9 APPENDIX

[redacted]