

# Indomie Noodles in Africa: lessons on digital and cultural branding

---

Uchenna Uzo and Louis Nzegwu

## Kenneth's dilemma

Kenneth Iruonagbe, a social media executive at De United Food Industries Limited (Dufil), walked into a meeting room of the company's corporate office in Lagos on October 1, 2016, a Saturday. He had been asked by the executive board to formulate a solution for dealing with the company's persistent market share loss in Nigeria's instant noodle market. Dufil, part of the Tolaram Group of Companies, had built a highly successful instant noodle brand, Indomie, through a mix of below-the-line (BTL), above-the-line (ATL) and social media marketing activities. Thanks to its success, the company was now exporting noodles produced in Nigeria to Congo, Ivory Coast, Ghana and Benin Republic. Yet, Indomie's market share had dropped by about 24 per cent in 2015 and the consumption level of the brand in Northern Nigeria remained quite low relative to the national average. Kenneth wondered what social media and digital marketing strategies could help improve consumption levels in Northern Nigeria. He had four weeks to formulate a plan of action.

## The story of Dufil

The success of Dufil in Nigeria was indeed remarkable. Incorporated in 1995, Dufil was a joint venture between the Salim Group of Indonesia and the Tolaram Group of Singapore, to manufacture the Indomie brand of instant noodles. The Tolaram Group, a business conglomerate established in 1948, specialized in the emerging markets of Asia, Africa and Europe. In 2015, the group had a global workforce of over 9,500 employees and a global revenue of over US\$950m. Tolaram Group's diversified portfolio of business included consumer goods, digital services, energy and infrastructure, distribution, real estate and textiles. Mr Haresh Aswani, the present Managing Director of Tolaram Group Africa, first imported Indomie instant noodles in 1988, with the vision of introducing an affordable, convenient and quality meal option to the Nigerian culinary landscape. His vision soon became a reality as Nigerian consumers welcomed the concept of instant noodles with open arms. Demand for Indomie instant noodles grew steadily, and Dufil was established to manufacture and distribute the product in Nigeria. This was followed by the construction of manufacturing plants in Ota (1996), Choba (2001) and Kaduna (2011). By 2004, Dufil was manufacturing a million cartons of Indomie per month, and by 2010, the company crossed the enviable milestone of producing the billionth pack of Indomie. As manufacturing progressed, Dufil partnered with Multipro Limited, again a part of Tolaram Group of Companies, to make the latter an exclusive distributor of Indomie in Nigeria. Dufil later went on to introduce several new brands of packaged foods, such as power pasta (2012), power oil (2013) and Minimie Chinchin (2014), which were distributed exclusively by Multipro. Since its introduction to Nigeria in 1995, Indomie had become one of the top five brands in Nigeria and the market leader in the noodles category. Subsequently, Dufil capitalized on the success of the brand to export the Indomie noodles manufactured in

Uchenna Uzo is Senior Lecturer at Lagos Business School, Pan-Atlantic University, Lagos, Nigeria. Louis Nzegwu is Professor at the University of Wisconsin-Platteville, Platteville, Wisconsin, USA.

Disclaimer. This case is written solely for educational purposes and is not intended to represent successful or unsuccessful managerial decision-making. The authors may have disguised names; financial and other recognizable information to protect confidentiality.

Nigeria to Ghana, Benin Republic, Ivory Coast, Cameroon and Congo. Despite these achievements, certain trends were causing concern to Dufil. Although the revenues from the noodle business had grown by approximately 67 per cent from 2010 to 2015, Indomie's market share in the same period had contracted by about 24 per cent. This was largely due to rising competition from new market entrants (see [Exhibit 1](#)). Chikki noodles, Indomie's first competitor, was introduced into the market in 2005. Thereafter, other noodle brands were introduced such as Golden Penny Noodles, manufactured by the Flour Mills Nigeria Plc; Dangote Noodles (which was later acquired from Dangote Group by Dufil Prima[1]), from the Dangote Group; Honeywell Noodles from Honeywell Superfine Foods; and several other brands, all of which focused on the mother and child segment of the market[2]. As of 2016 in Nigeria, there were no less than 16 noodle brands struggling for a share of the customer's wallet. Brands such as Chikki, Cherie, Golden Penny and Tummy Tummy posed stiff competition to Indomie. By offering me-too products at lower prices, these brands tried to establish local strongholds on markets in specific regions. Cherie, for example, adapted its product for the northern market, while Tummy Tummy strengthened its position in the eastern market. Most competing brands attempted to offer a price advantage over Indomie to gain market share. They also emphasized brand attributes that were similar to those of Indomie such as convenience, quality and taste.

Another concern for Dufil was the shrinking wallets of instant noodle consumers caused by the economic downturn in Nigeria that started in 2015 and continued into 2016. In September 2016, the inflation rate had risen from a single digit to a whopping 17.6 per cent. The interest rate was 14 per cent, the unemployment rate was 13 per cent, the underemployment rate was 19 per cent and the value of Nigerian currency had depreciated, ₦475 = US\$1[3]. Wages were not being paid when due, there were thousands of job cuts, the spending power of shoppers was fast reducing and consumers' wallets were under severe pressure. Dufil was concerned that demand for the product would fall as a result of the challenging economic environment.

The biggest concern for Dufil was the situation of consumers in Northern Nigeria because the consumption levels of Indomie were lower in this territory than the national average. Despite its large population and relatively young demographic, Northern Nigeria had accounted for only a tiny share of Indomie's sales in the past four years. The marketing director of Dufil summarized the company's concern for Northern Nigeria in the following words:

Our market share position in Northern Nigeria has generally been higher than the national average (see [Exhibit 2](#)). The issue we face in the north is low consumption. If you look at the category penetration it stands at 60 per cent, this number is far lower compared to the national average of 80 per cent. Although we face stiff competition from Cherie, Golden Penny and Dangote, I would say that our core focus for the north is how to grow the category by increasing penetration and thereby improving the per capita consumption which stands at approximately 1/3rd the national average currently.

Kenneth was mindful of Dufil's history of success and wanted to maintain the legacy. He began to reflect upon the nature of the instant noodles market in Africa.

### **Instant noodles market in Africa**

The consumption of noodles in Africa was still an emerging phenomenon. According to Euromonitor International (2016), at 941 million tons, Nigeria recorded the highest consumption level for a combination of noodles, pasta and rice in the continent. In comparison, Kenya consumed a total of 105 million tons, while South Africa consumed 597 million tons. In Nigeria, consumers were reported to have a noodle portion of 240 and 280 g per meal, which was the highest in Africa and also higher than some South Asian markets such as India. In 2015, the five-year sales revenue recorded by the noodle category was 25 per cent for Nigeria versus 11 per cent for South Africa. In countries like Ghana, Ivory

Coast, Benin and Congo, noodle consumption was a fairly recent phenomenon, and not enough data were available to estimate the size of the market. Indomie stood out as the leading brand and market leader in the country. Dufil maintained its leadership position by continuously launching new products, maintaining premium pricing and adopting a unique distribution strategy. Every year, Dufil came up with new ideas and flavors (see [Exhibit 3](#)). The belief was that customers' tastes and satisfaction levels evolved over time. The company's strategy was to increase the consumption of Indomie by creating more flavors. Different flavors were developed for different consumer segments ([Exhibit 4](#)). Unlike other noodle manufacturers, Dufil adopted a unique distribution strategy that made it possible for the channel members to receive adequate sales support down the channel and to be managed by an exclusive national distributor in the form of Multipro. The vast pan-Nigeria network of dedicated distributors and sub-distributors helped Multipro reach out to close to one million retailers, and through them, over half of Nigeria's 37 million households. Multipro offered additional support to their channel partners through retail vans and foot soldiers, who helped in re-distributing stock to the retailers. As of 2015, Multipro had invested millions of dollars in developing and strengthening the re-distribution mechanism. The company also offered more benefits and higher margins to its channel partners than competitors. Distributors and sub-distributors who patronized Indomie saw great business value in associating with the brand. As one of Indomie's distributors put it:

Doing business with Indomie has been extremely profitable. The product is of good quality and moves quickly as customers are always asking for Indomie. This product gives me very high returns on my capital.

## **Building the Indomie brand**

The Indomie brand was built over a 20-year period to symbolize convenience, quality, fun and youthfulness. Indomie was positioned as a quick-fix meal that could be prepared on the go. It was regarded as a high-quality, nutritious noodle that was fun to consume. The brand played up its youthful image by providing a feeling of freshness, newness and responsiveness to consumer needs. In the first 18 years of Dufil's existence, the brand-building efforts were targeted at the mother and child segment. However, as the brand grew and consumers grew with it, a youth segment (12 to 30 years) was identified from the generations who had consumed Indomie in their childhood. Indomie's brand-building activities witnessed three major stages:

1. exclusive use of below-the-line (BTL) activities;
2. blend of BTL and above-the-line (ATL) activities; and
3. inclusion of social media and digital marketing into the portfolio (see [Exhibit 5](#)).

### ***BTL and ATL activities***

In the first few years of being in business, Dufil focused exclusively on BTL activities to build the Indomie brand. The company adopted the approach of personal selling to mothers, as it was believed that mothers knew a lot about the quality, taste and assurance of food, thereby serving as gatekeepers for food and grocery purchases of the family. Next, Dufil launched a school sampling campaign that focused on helping school children to taste instant noodles for the first time in the form of Indomie. Employees of Dufil introduced fun, dance and demonstrations to the sampling process, and this endeared the children toward the brand. Free packets of Indomie were distributed thereafter to the children. This process turned out to be so effective for creating brand awareness that by 2015, Dufil was providing samples for about eight million children every year in Nigeria and two million children in Ghana. As the brand evolved, market, trade and street activations were included in the BTL mix. In a typical market activation, marketing personnel from Dufil moved through the markets or streets while dancing, playing music and helping people sample Indomie. This

process was very helpful in generating brand awareness locally. By researching the communal and cultural differences in every region, Dufil learnt how to tailor its BTL campaigns to suit the tastes and needs of the different consumers. In regions where Indomie was facing stiff competition from other brands, Dufil launched a “market development” strategy involving door-to-door sales and last mile distribution by the marketing personnel. After nearly a decade of solely BTL marketing, Dufil introduced ATL activities such as radio and television advertisements (see: 2010 Mama campaign: [www.youtube.com/watch?v=rwSjs8MsjdM](http://www.youtube.com/watch?v=rwSjs8MsjdM); See 2015 You like no other campaign: [www.youtube.com/watch?v=SFDnnGQZK7o](http://www.youtube.com/watch?v=SFDnnGQZK7o)).

Additional BTL activities such as in-store awareness and retailer activations were conducted all over Nigeria to support ATL activities. The outcome of this heavy mix of ATL and BTL marketing was that the brand Indomie became a household name and began to be used by many consumers as a generic term for instant noodles, with many customers referring to competitor brands as “Indomie”.

### *Social media engagement*

Till 2013, Dufil enjoyed a double-digit growth year on year. However, as the company witnessed a sharp decline in Indomie’s market share, it began to explore alternative channels for promoting brand awareness and consumer engagement. Research on consumer trends commissioned by Dufil revealed that the major consumers of Indomie belonged to the age bracket of 12 to 30 years. It was also observed that this age group actively used social media platforms such as Facebook, Twitter and Instagram. Dufil then decided to leverage social media to enhance engagement with teenagers and young adults. In 2016, Dufil began to publish content on their social media pages periodically and consistently, targeting young adults and, in some cases, mothers. Social media was also used to promote the Indomie brand on important occasions such as Mother’s day, Valentine’s Day and Children’s day (see: [www.youtube.com/watch?v=WayqlOORW0k](http://www.youtube.com/watch?v=WayqlOORW0k)). Interesting and trending topics were chosen to generate content that would interest young, active users on platforms such as Facebook (see [Exhibit 6](#)). Online engagement initiatives included photography and match outcome prediction contests. Social media was also leveraged to promote Indomie’s campus ambassador initiative – an activity to bring the young men and women attending university closer to the brand. Indomie’s campus ambassadors were students who tended to be the local opinion leaders in their respective universities. They were put through a specially designed career-building process which included training modules in digital marketing, marketing projects in local areas and exclusive interactions with Indomie’s management team. The campus ambassadors were in turn encouraged to share stories, photographs and other content related to the brand through social media. Followers on Indomie’s social media pages were encouraged to share interesting stories that depicted positive values the youth could emulate while generating conversation currency at the same time. In the words of Mr Tope Ashiwaju, Indomie’s marketing manager:

As long as we can get a lot of people to talk about or comment on a story on our page, we have secured brand engagement and this is good for us.

As social media engagement around the brand increased, Dufil made efforts to moderate the brand-related discussions effectively and focused on responding to the consumers’ comments in real time to improve interaction. A team of four was put together to manage consumer interactions on social media, including aggregating and responding to consumer feedback. The objective of the team was to achieve an 80 per cent response rate to consumers’ online demands so that by 2016, there were 10,000 to 15,000 reactions to each post on the company’s Facebook page. In the first quarter of 2016, Dufil used social media to support the launch of a new variant of Indomie.

The company intended to create a larger pack of Indomie because research insights had suggested that a significant number of people wanted a larger quantity of noodles per pack, especially when they consumed noodles for a meal. This was a significant opportunity for Dufil because it had always positioned the brand as a breakfast snack that could accompany other meals. Yet research was beginning to suggest that some customers wanted to consume noodles as a full meal that was filling and affordable. Thus, a product was created for noodle consumers within the age bracket of 18-25 years who were active, upwardly mobile and energetic.

To find a name for the product, Dufil initially sought the help of media agencies. A number of names were suggested but none was found to be suitable. Dufil then sought the views of its customers through its Facebook page. To prevent competitors from learning about the new product, Dufil announced to its customers that it wanted to change the name of the “hungry man” pack and solicited suggestions for the same. Over a thousand comments were obtained and among the names suggested were “belle full”, “power max”, “bumper pack”, “biggie”, etc. The top six suggestions were put to vote on social media where there was a near unanimous vote in favor of the brand name “Belle full”. In the process of identifying a brand name, nearly two million people were engaged through the social media platforms prior to the product launch. This social media campaign was supported by street, market and in-store activations. Thanks to this campaign, “Belle full” became the product to achieve the highest sales revenues within the first quarter of a launch, in Dufil’s history.

### *Exploring digital marketing*

Although Dufil was actively involved in social media marketing, some employees were of the opinion that digital marketing and analytics could be useful for real-time market insights from social media platforms. For instance, more information could be provided on customer needs and brand perception, as well as information on preferred pack sizes. A focus group discussion with Indomie consumers suggested that smaller packs of Indomie were of a higher quality than the larger-sized ones. In the words of a consumer:

The problem with the hungry man or big-size Indomie is that it doesn’t have that unique taste. The smaller size has a better taste than the hungry man size. Eating the hungry man size is like eating spaghetti with Maggi – It just doesn’t taste as good as the small size. When the hungry man size gets cold, it becomes too elastic and goes back to its normal size.

Other consumers wanted the health benefits of the brand to be emphasized in the advertising campaigns. These and other insights could be obtained through data analytics. Yet Dufil was yet to have a fully detailed digital marketing strategy in place. The company began to consider a more systematic use of website optimization and social media analytics tools.

### **Critical decisions**

Kenneth was convinced that the growth in consumption levels in Northern Nigeria was critical to improve the market position of Dufil in Nigeria, as that region accounted for almost 30 per cent of its sales. While sipping a cup of coffee, he pondered the critical decisions that needed to be taken. The first issue was related to the consistency of Indomie’s brand message across Nigeria. He recalled the remarks of Mr Onome, product manager for *Belle full* :

I think the company has very strong capability when it comes to marketing and communications. However, I think as a brand, we need to define the key area we play in so as not to say too many things and get confused. Sometimes when you fragment so much information, it gets filtered out. For us, we know that we are talking about taste, nutrition and fun, but, how well is the product or position as a brand sitting with our consumer? Have we said too much or do we need to say fewer things with more frequency?

Kenneth also wondered whether Dufil's media advertising and brand-building efforts in Northern Nigeria should be targeted at the mother and child segment or the youth segment. He was concerned that targeting this segment had already proven to be a daunting task, not to mention that market research indicated grocery shopping was mainly done by fathers in most regions of Northern Nigeria. Mothers and young women were less involved in shopping in the North, compared with the rest of Nigeria. Kenneth wondered what the cost of setting up a dedicated campaign for the North would be, especially in the face of a limited budget prompted by the economic crunch. He thought about the cultural values Indomie could build upon, to appeal to a Northern father and increase brand awareness in the shortest possible time span.

Targeting the youth seemed more appealing to Kenneth, as such efforts were consistent with Dufil's strategic decision to pay more attention to young consumers. Marketing to the Northern youth segment was seemingly attractive for two reasons. The northern region of the country had a larger population and higher birth rates than the southern region of Nigeria[4]. This region also had the largest concentration of young people in the country but was at a disadvantage when it came to the educational level of its youth. Therefore, there existed an opportunity for building the Indomie brand in the context of youth education, empowerment and social change.

A major hurdle in targeting the Northern youth was the fairly common practice of communal eating from the same bowl. The advertising messages Dufil had adopted for the youth segment targeted individual eaters of noodles and focused on increasing the consumption level of noodles per individual eater. A clear example was the "Belle full" advertising campaign targeted at young, working-class men who ate alone and needed a sufficient quantity of noodles to satisfy their hunger. Just the day before, Mr Tope had reminded Kenneth about this reality. In his words:

Our campaigns are becoming more individualistic. We have moved from campaigns like "Mum like no other" to "you like no other". Before, we were trying to connect to the children through the mothers, but now, we are connecting the individual person.

Furthermore, research suggested that Northern Nigerian women enjoyed cooking for long periods of time because this practice reflected their womanhood and maternity. On the other hand, Indomie was positioned as a quick-fix meal that could be prepared within a few minutes. An issue to be addressed was whether social media marketing would be more effective than traditional marketing in building the brand within Northern Nigeria. Indomie's social media pages across different platforms had achieved reasonable traction among the young adults in the north. Social media marketing would speed up the access to underserved segments within Northern Nigeria, allow for more customized campaigns and foster real-time interactivity between sales people and the consumer. Eventually, social media engagement would make it possible to understand how online sources of influence and inter-personal dynamics help consumers in the north make purchase decisions. Therefore, focusing on increasing the social media patronage of Northern Nigeria consumers seemed promising except for the fact that the Northerners appeared somewhat uninterested in social media engagement. According to Mr Tope, the social media manager:

Northerners are not attached to social media as the other regions in Nigeria. I think it is a cultural thing. Most of the people in the north prefer to listen to their radios and they seem to enjoy listening to skits on radio. We are investigating the issues with social media engagement in the North and social media habits in Nigeria.

A study of media habits in Northern Nigeria had been quite informative. (In the event where Dufil had grown the consumer base in Northern Nigeria through BTL activities such as school sampling, road shows, etc., it was unclear whether social media as a channel would be more effective to move consumers from brand awareness to brand loyalty in Northern

Nigeria.) The actions taken by Dufil for the Northern Nigeria consumer segment had serious implications for the health of the Indomie brand not only in Nigeria but also in the four other African countries where Dufil had recently begun to sell its products. Kenneth could not forget what the Head of Marketing, Mr Pawan Sharma, had told him during the last strategy retreat:

Nigeria is not one country but an agglomeration of countries within one nation feeding distinct markets with their distinctive characteristics and needs. Marketers who see Nigeria as one country are sadly mistaken.

Kenneth was particularly worried about how to craft Dufil's social media and digital marketing strategy to cater for brand enthusiasts and consumers in other regions of the country. If noodle consumers from the north had radically different consumer behaviors from those in the south, how could Dufil integrate the social media strategy? Kenneth feared that the media communication messages for consumers in the north might alienate consumers from the brand in the south. There was also the concern that any attempt to integrate the media messages for both segments could trigger confusion about the brand's positioning. Clearly, Northern Nigeria consumers needed to be addressed in the language that they could understand but would digital engagement serve this purpose?

Dufil was also convinced that crafting a compelling social media and digital marketing strategy for Nigerian consumers was a shortcut for understanding how to build the brand in Ghana and Ivory Coast. Dufil found there was a need to educate the markets in these countries to try noodles. A lot of effort was required to move the consumers past brand awareness and into brand loyalty. In Ivory Coast, communal eating was common just as in Northern Nigeria. Ivoirians enjoyed inviting others to join them for a meal. It was believed that those who were blessed enough to prepare a meal should share their good fortune with others. Ivoirians believed that eating not only gave the body nourishment but also united people with community spirit.[5] In Ghana, noodles were consumed at night and were perceived as fast foods with adverse health effects. Some Ghanians reportedly believed that it took the human body over 10 h to properly digest noodles, thereby leading to obesity[6]. Perceptions and practices as mentioned above resulted in limited sales for the brand in sub-Saharan countries. The sales in Lagos alone were higher than the combined sales in Ghana and Ivory Coast. It would not be profitable to open a plant in Ghana because of the limited market size; thus, there is a lot of pressure on the Nigerian plant.

Kenneth thought deeply about the advice from Mr Tope who stated:

We cannot integrate the social media activities across Ghana & Ivory Coast and Nigeria. We might need to take different campaign routes. Some of these countries are way ahead of others in their consumption of digital content. We should concentrate our campaigns in these countries on taste and quality in order to drive category penetration.

Kenneth could not afford the luxury of time to take these critical decisions. He only had a month to come up with Dufil's social media strategy for brand building in Northern Nigeria and the company's digital marketing strategy for the next three years which would help Dufil grow its consumption level in Northern Nigeria.

**Keywords:**  
Marketing,  
Brand management/equity,  
Social media strategy

## Notes

1. *Vanguard Newspaper* Nigeria, April 19, 2017.
2. <http://authorityngr.com/2016/03/Battle-of-noodles-Indomie-Noodles-Vs-Honeywell-Noodles/>
3. [www.nigerianstat.gov.ng](http://www.nigerianstat.gov.ng)
4. National Bureau of Statistics, December 2014: Statistical Report on Women and Men in Nigeria.
5. [www.foodbycountry.com/Algeria-to-France/C-te-dlvoire.html#ixzz4N3E1Vu2z](http://www.foodbycountry.com/Algeria-to-France/C-te-dlvoire.html#ixzz4N3E1Vu2z)

6. 5 Unhealthy Eating Habits of Ghanians: <https://healthyghanatv.wordpress.com/2015/08/12/5-unhealthy-eating-habits-of-ghanaians/>
7. [www.foodbycountry.com/Algeria-to-France/C-te-dlvoire.html#ixzz4N3E1Vu2z](http://www.foodbycountry.com/Algeria-to-France/C-te-dlvoire.html#ixzz4N3E1Vu2z)
8. [www.everyculture.com/A-Bo/Benin.html](http://www.everyculture.com/A-Bo/Benin.html)
9. 5 Unhealthy Eating Habits of Ghanians: <https://healthyghanatv.wordpress.com/2015/08/12/5-unhealthy-eating-habits-of-ghanaians/>

**Exhibit 1. Market share positions in the Nigerian noodles market**

<b>Table E1</b>						
Year	2010 (%)	2011 (%)	2012 (%)	2013 (%)	2014 (%)	2015 (%)
Indomie	78.0	70.0	68.0	58.0	54.0	54.0
Chikki	14.0	11.0	11.0	13.0	11.0	12.0
Golden Penny	1.0	3.2	4.0	11.0	12.0	9.5
Tummy Tummy	1.0	6.6	6.0	8.0	7.0	5.0
Dangote	1.0	1.0	2.0	3.0	2.0	2.5
Cherie	3.5	2.5	3.0	4.0	6.0	6.0
Minimie	0	0.0	0.0	0.0	0.0	4.0
Others	1.5	5.7	6.0	3.0	8.0	7.0

Note: \*Figures are disguised to maintain confidentiality  
Source: MediaReach OMD

**Exhibit 2. Sales share by region**

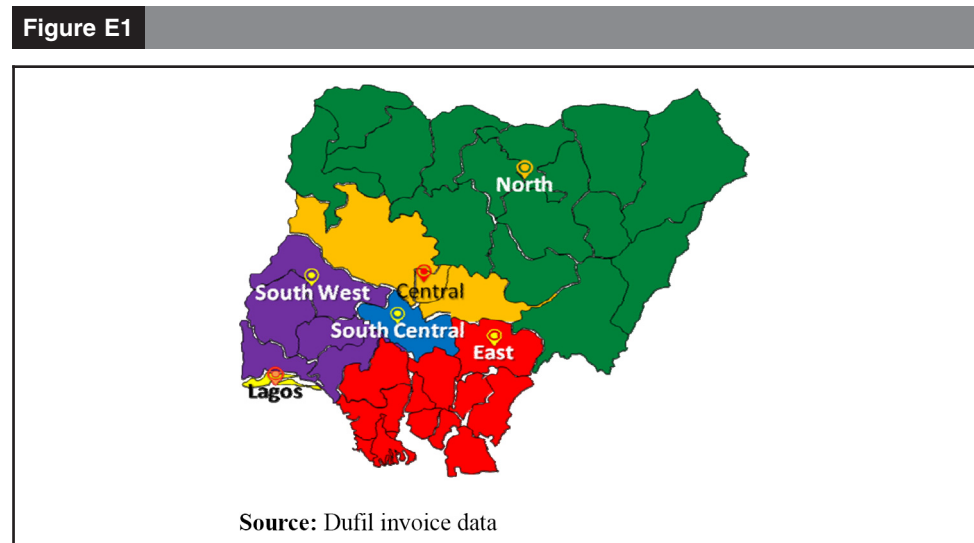


Exhibit 3. Sample of Indomie products

Figure E2

### Indomitables Pack Chicken Flavour



A delectable combination of chosen ingredients of chicken flavor, spices and vegetables, all uniquely blended to give that unparalleled taste and irresistible aroma. Indomie Regular Chicken Flavour is Nigeria's favourite flavor of Instant Noodles. In addition, the pack contains essential vitamins and minerals like Vitamin A, Thiamine, Pantothemate, Vitamin B6, B12, Calcium, Vitamin D, Riboflavin, Niacin, Folic Acid and Iron.

The 70g Regular Chicken Flavour now comes in an attractive new packaging, branded with Indomie's superhero team, THE INDOMITABLES!



### Chicken Flavor Super Pack



A bigger version of the Indomitables pack, Super Pack offers more of Indomie's classical combination of ingredients ensuring a more fulfilling experience.



### Hungry Man Size Chicken Flavour (210g)



For our veteran Indomie lovers, who've grown up eating their favourite Indomie Instant Noodles, it only gets bigger and better! Indomie Hungry Man Size packs the classic, delectable flavor of Regular Chicken in the largest pack of Instant Noodles in the country.

Indomie Hungry Man Size is our ode to those with bigger appetites and an insatiable love for Indomie. You wanted more, you got more!





**Indomie**  
Instant Noodles  
Belle Fu  
TOTAL HUNGER BUSTER

#### Exhibit 4. Consumer segments for Indomie

Table EII		
Grade	Social class	Traditional occupation
A	Upper middle class	Upper manager or professional
B	Middle class	Middle manager or professional
C1	Lower middle class	Line manager, administrator, junior professional
C2	Skilled working class	Skilled manual worker
D	Working class	Unskilled manual worker
E	Subsistence	Casual worker or unemployed

Source: NRS Consumer Segmentation Variables

#### Exhibit 5. Revenues, market share and marketing spend

Table EIII						
Year	2010	2011	2012	2013	2014	2015
Market share (%)	78	70	68	58	54	54
Revenue in Naira* (million)	62	71.1	81.8	81.9	84.9	85.4
ATL spend (%)	32.4	32.4	36.1	33.6	25.5	28.4
BTL spend (%)	67.4	67.3	62.9	64.4	70.4	69.3
Social media spend (%)	0.2	0.3	1	2	4.1	2.3

Note: \*Figures are disguised to maintain confidentiality  
Source: MediaReach OMD

#### Exhibit 6. Social media penetration in Nigeria

Table EIV			
Regions	Facebook	Twitter	Instagram
North Nigeria	1,600,000	200,000	230,000
West Nigeria	3,200,000	400,000	460,000
East Nigeria	4,000,000	500,000	575,000
South Nigeria	6,240,000	780,000	897,000
Outside Nigeria	960,000	120,000	138,000
Total	16,000,000	2,000,000	2,300,000

Source: MediaReach OMD

#### Exhibit 7: Focus group report on northern media habits and noodles consumption

The interview was focused on understanding the media profile, predispositions to adverts, cultural nuances, eating habits and consumption of the noodles category, purchasing habits and finally aspirations of the respondents:

- **Sample characteristics:** 8 females within the ages of 25 to 40 years; all within the socio-economic class of C to D; all from the Northern region; everyone married with children; and everyone consumes noodles.
- **Media habits:** Radio and TV media are the most prevalent among the respondents, with five out of eight confirming that they consume radio more than television. In fact, they had stated that, in general, in the north, the parents prefer listening to radio, while the children prefer watching TV. Radio channels with the highest listenership are Freedom FM (99.5 FM), Rahama Radio (97.3 FM) and Express FM (90.3 FM) and the most preferred programs are *Tambaya mabudin ilmi*, *Inda ranka*, *Gowane gauta* and *Fantami*. For television, the respondents mentioned Sunnah TV, Arewa 24 and

Bollywood, with the most preferred programs being *Islamic preaching*, *Dadin kowa* and Indian films.

- *Adverts*: What interests them about adverts include music and especially the beats, Hausa celebrities, the key message, inclusion of kids, good voice with a real native accent. Also, they recall adverts placed on radio the most because of the repetition and the music rhythm. They had also suggested that if they were managers required to design and advertise for noodles, they will use popular musicians like Nazir Ahmed, a family (husband, wife and kids), characters with good native accents, music with good beats. They had also stated that they will place the advert on radio stations like Freedom FM, Rahama Radio and the new radio station AREWA Studio. In addition to all of these, they will do activities in rural areas with dancers, as people like to watch such kind of entertainment. Regarding the noodles advert the respondents like and can remember, the majority of them mentioned the Indomie *Belle Full* advert and Cherry advert on radio.
- *Noodles*: On brand awareness, the noodles brands mentioned were: Cherie, Indomie, O Noodles, Royal, Dangote and Golden Penny. Everyone consumes noodles, but the mostly popular among the children and is the Talia Yara in Hausa which means Children Pasta. They had also mentioned that the Indomie brand is popular among parents, while Cherie Noodles is popular among children. And this is basically because of the higher Pepper and Maggi content in Cherie Noodles. Cherie's delightful advert on radio talks about the different flavors of the brand and the fact that the children are also influenced by their peers when they see them with the Cherie brand. All the respondents said that they consume noodles in their homes with their children, with the majority of them stating that they consume it three to four times a week. On average, they buy two cartons of the 120-g pack every month and consume one pack size on each consumption occasion. The reasons given for the consumption of noodles include: it is fast and easy to cook, product taste, provides opportunities for multiple eating scenarios such as cooking, eating raw and soaking with milk, no additional ingredients required, it is light but filling, children like it and it is cheap and affordable.
- *Eating habits*: The response to the most important meal in the day was divided between breakfast and dinner while all of the respondent agreed that lunch is of little significance. Rice and tuwo (semovita) were the most often consumed staples at home. All agreed that price is the most significant factor considered when making purchasing decisions. They like to eat together in a communal fashion.

### Corresponding author

Uchenna Uzo can be contacted at: [uuzo@lbs.edu.ng](mailto:uuzo@lbs.edu.ng)