Marketing Research in a Data Rich World

Sam Curtis
Evgeny Popov

Moscow, November 26

© TNS 2015

Market research goes beyond traditional

0.1

%

Growth of 'traditional market research' market in 2014 globally
(ESOMAR)

43.9

billion $

Volume of 'traditional market research' market in 2014 globally
(ESOMAR)

63.8

billion $

Estimation of the 'extended' market research volume in 2014 globally
(ESOMAR+Outsell Inc.)

(including online analytics, management consultancies, social media communities, do-it-yourself survey software, etc.)

© TNS 2015

What will the future of market research look like?

Death of the (long) survey	Device agnostic surveying	Behaviour (not claim) triggered surveying
'In-the-moment' feedback	Social media data infused in all types of research	Ongoing brand-consumer dialogue
Partnership with owners of big data	Real-time, predictive results	Half of our data comes from non-surveys

© TNS 2015

Client expectations

ROI

Accurate

Integrated

Timely

© TNS 2015

1
The connected consumer

Two emergent aspects of the Connected Consumer

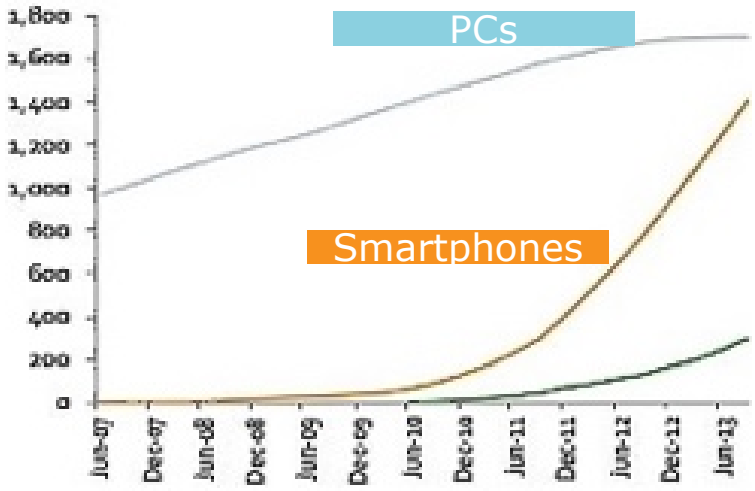
Mobile

Social

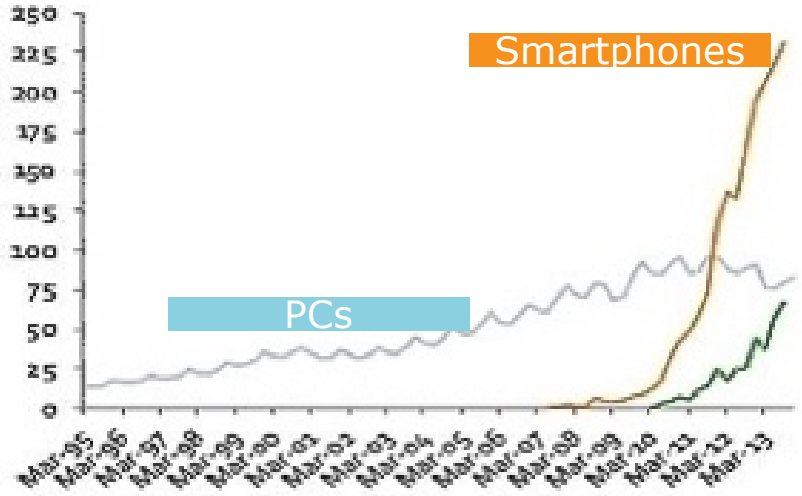
© TNS 2015

Shifting device dominance

Global installed base (m)



Global quarterly unit shipments (m)



PCs — iOS&Android smartphones — Tablets

Source: Gartner, Google, Apple, Enders Analysis, 2014

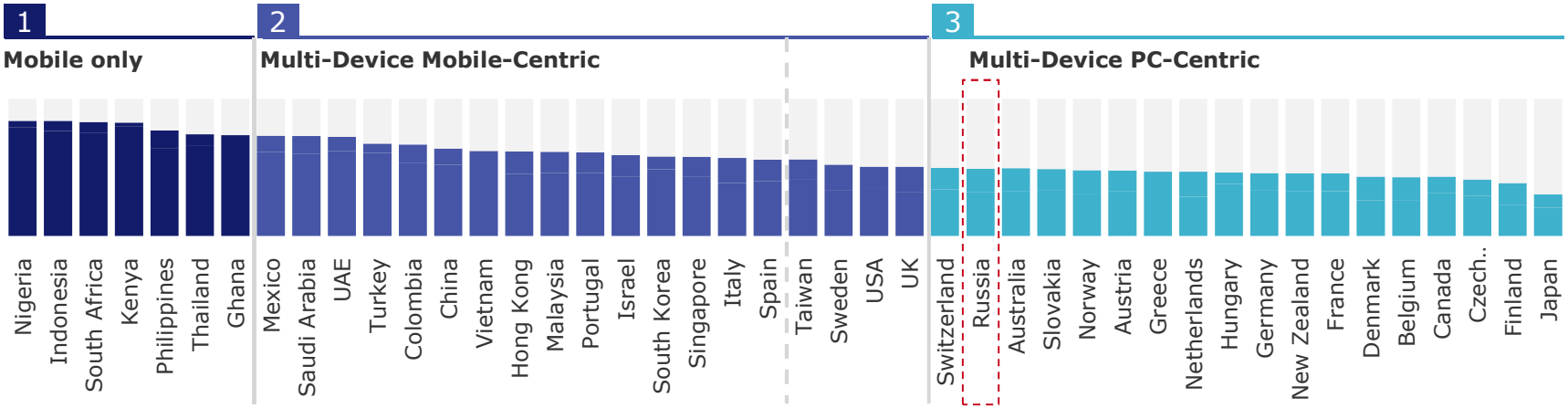
© TNS 2015

For the first time, the majority of the world is now mobile-centric

Device centricity Globally

% time spent on mobile and tablet daily

2015



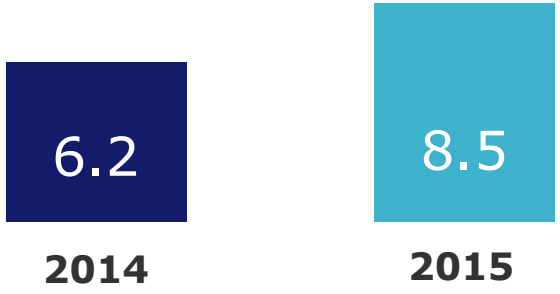
TNS Global Connected Life study, D3. Time spent on devices/media/activities
Base: Typical day – 2014 Global (36,325) | 2015 Global (41,635)

© TNS 2015

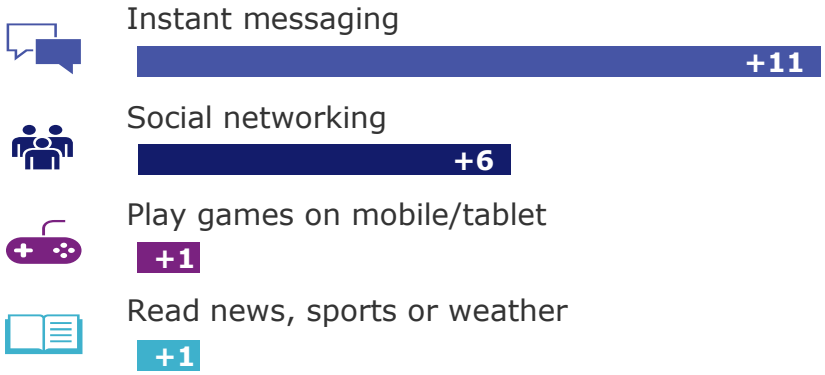
Social and Instant Messaging drive increased digital interaction

2014 vs. 2015 Digital Hotspots – Global

Average number of digital activities
(Weekly)



Top digital activities
(YoY change in weekly usage %)



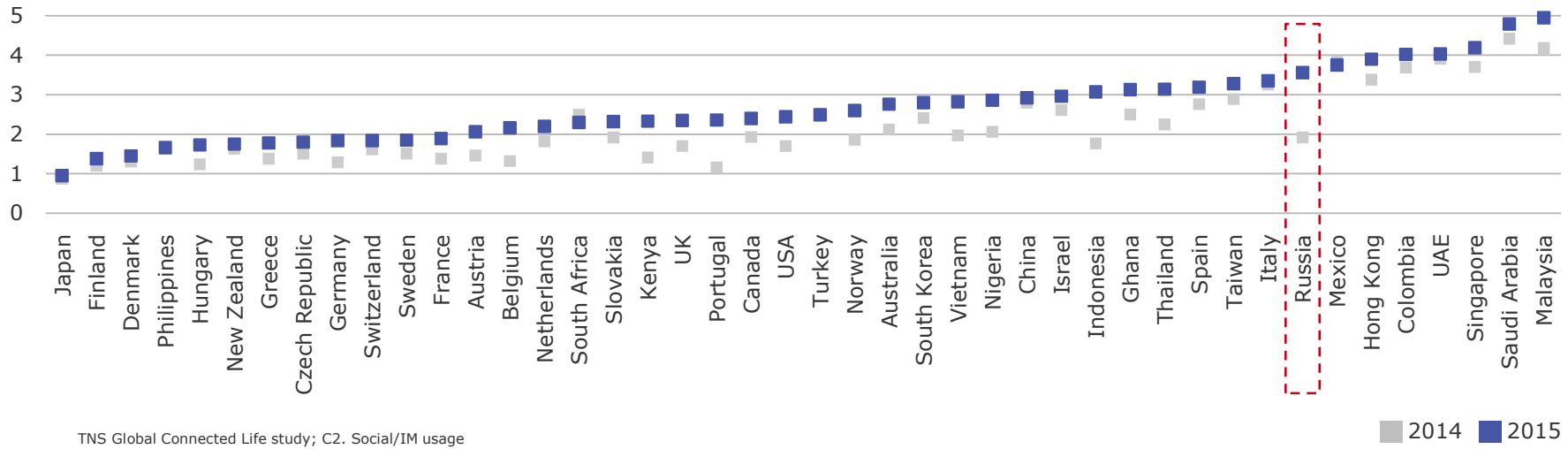
TNS Global Connected Life study C1. Digital activities
Base: 2015 Global (53,495) | 2014 Global (49,302)

© TNS 2015

The number of social platforms is expanding everywhere

Fragmentation of social and instant messaging platforms

Average number of platforms used daily



TNS Global Connected Life study; C2. Social/IM usage
Base: Global 2015 (53,495) | Global 2014 (49,302)

© TNS 2015

But how does this help us do better research?

Mobile

Social

© TNS 2015

2
Mobile

Why move to mobile? The problems that market research faces

Inaccessible

Unrepresentative

Memory recollection

Slow

Long & un-engaging

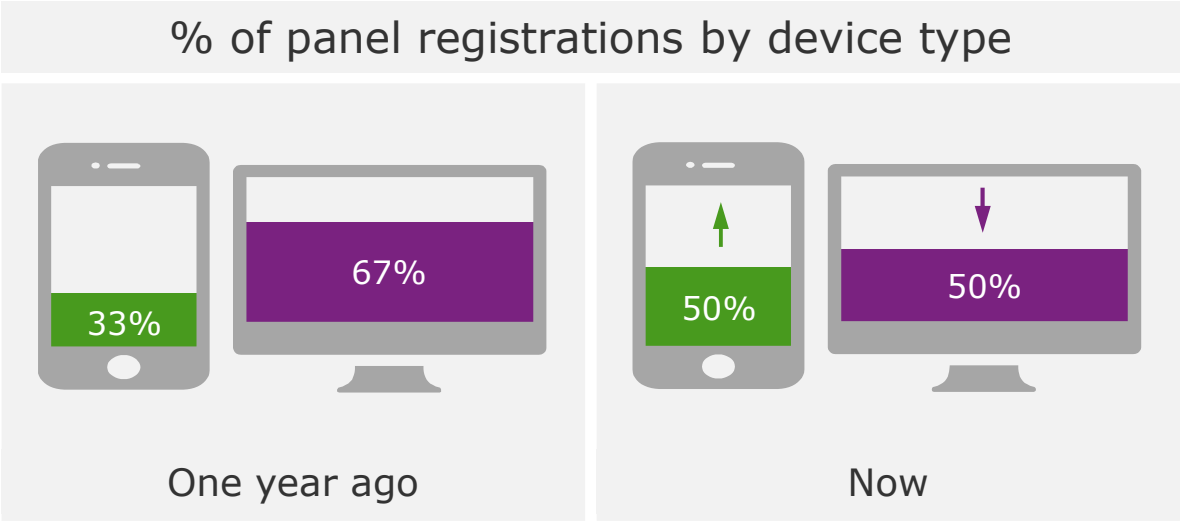
Unresponsive

© TNS 2015

Respondents are signaling a desire for change

70%

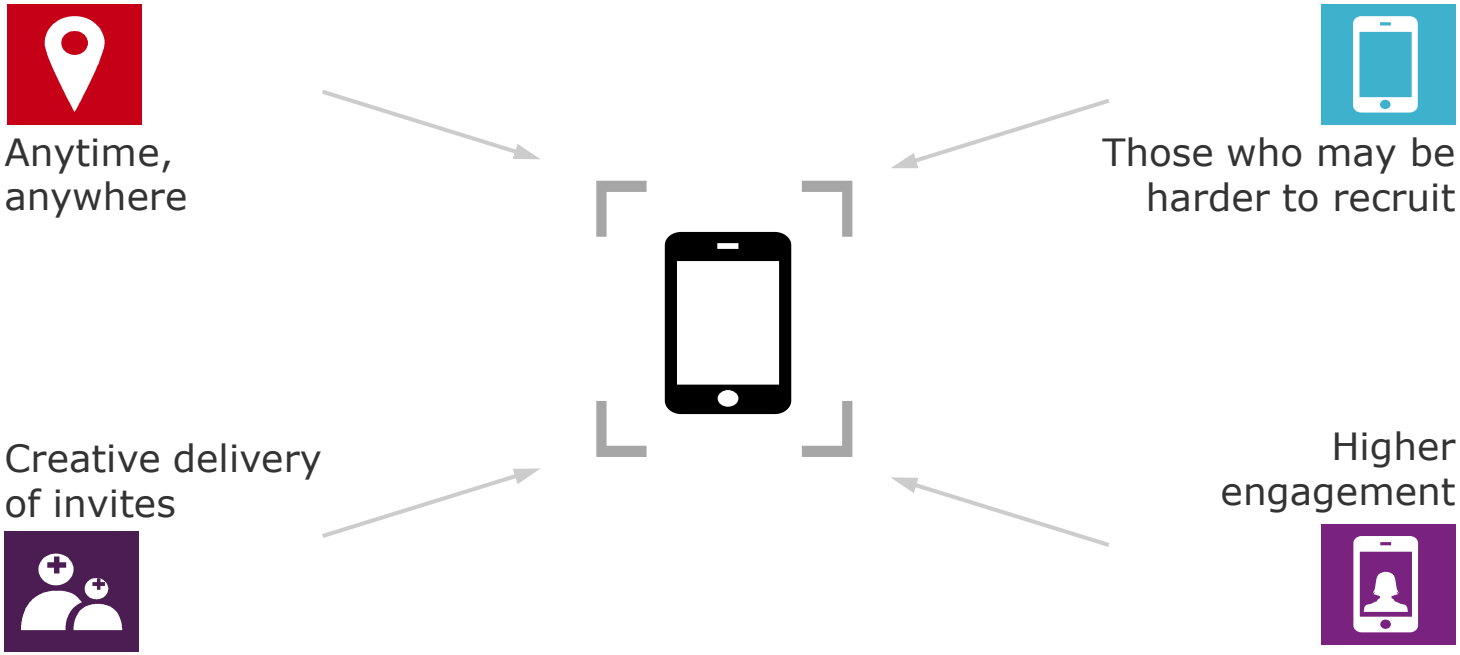
of respondents believe surveys '15 minutes or over' are too long to take on a smartphone. ~50% also believe the same is true on PC / Laptop / Tablets)



Source: Kantar / Lightspeed GMI analysis of Global panellist registration

© TNS 2015

Collecting data using mobile devices can provide some key benefits:

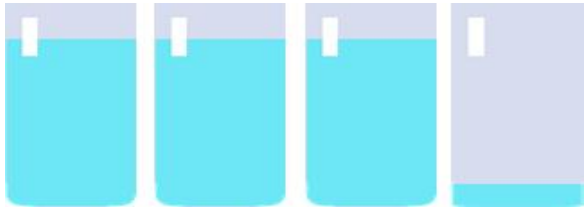


© TNS 2015

As questionnaires get longer, they get bored & engage less

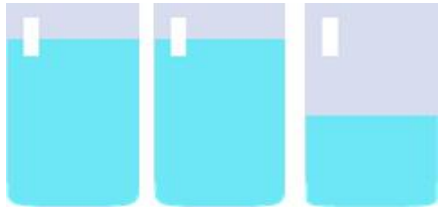
How many glasses of tap water did you drink yesterday?

3.1



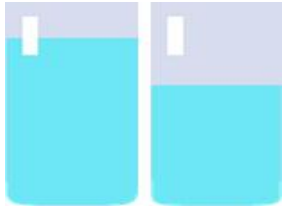
Start of survey

2.4



Middle of survey

1.6



End of survey

Source: Kantar / Lightspeed GMI

© TNS 2015

At TNS, we are moving to ‘device-agnostic’ design for all surveys

Drop outs

If the survey is not designed for mobile, more than half of those attempting to take on mobile will drop out

Think of yourself as a respondent

What device allows you…
- To respond easily and quickly?
- To give accurate responses?
- To stay engaged in the survey?
- To answer additional surveys?

The device YOU choose!

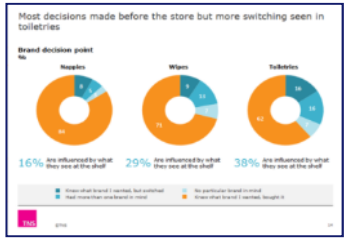
Average non-completion rates (%)
Source: Kantar / Lightspeed GMI only data Oct-Nov 2014

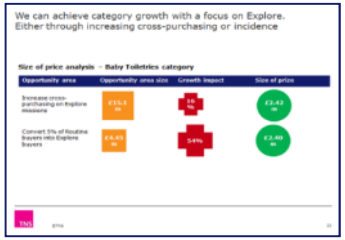
© TNS 2015

Case Study: Get quicker data
Baby Care Shopper Purchase Journey, US

Old Approach	**New approach**
20 minute questionnaire	**7** minute questionnaire
60% completion	**97%** completion
2% answered on mobile	**21%** answered on mobile
1,200 respondents	**1,800** respondents

Same budget, Same deliverable
Report prepared in 1 week instead of 2





© TNS 2015

Case Study: Get quicker data
Baby Care Shopper Purchase Journey, US

Shorten brand lists

Only 12 brands were large enough to analyse

Reduced brand list from 35 to 12

Saved 5 minutes of questionnaire length

Redundant questions

8 Questions were not used in the final report

We removed all of these

Saved 6 minutes of questionaire length

© TNS 2015

Case Study: Get better data
UK, alcohol purchase 'on-trade'

Number of influences on purchase decision
In reality few count at moment of purchase

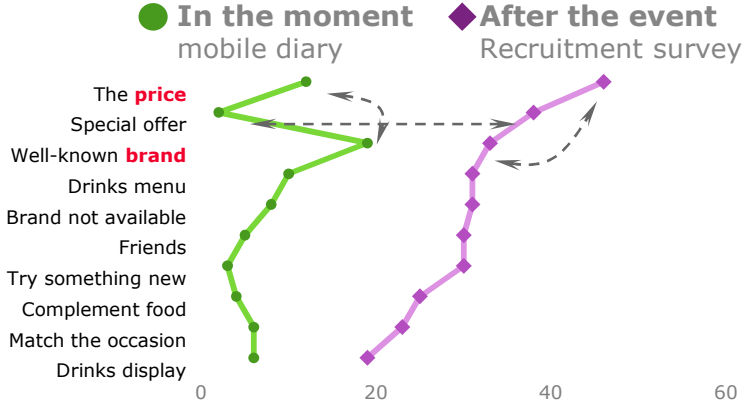
3.8

influences mentioned
per respondent

1.4

influences mentioned
per purchase

Consumers make decisions quickly
Brand most important "in the moment" of purchase



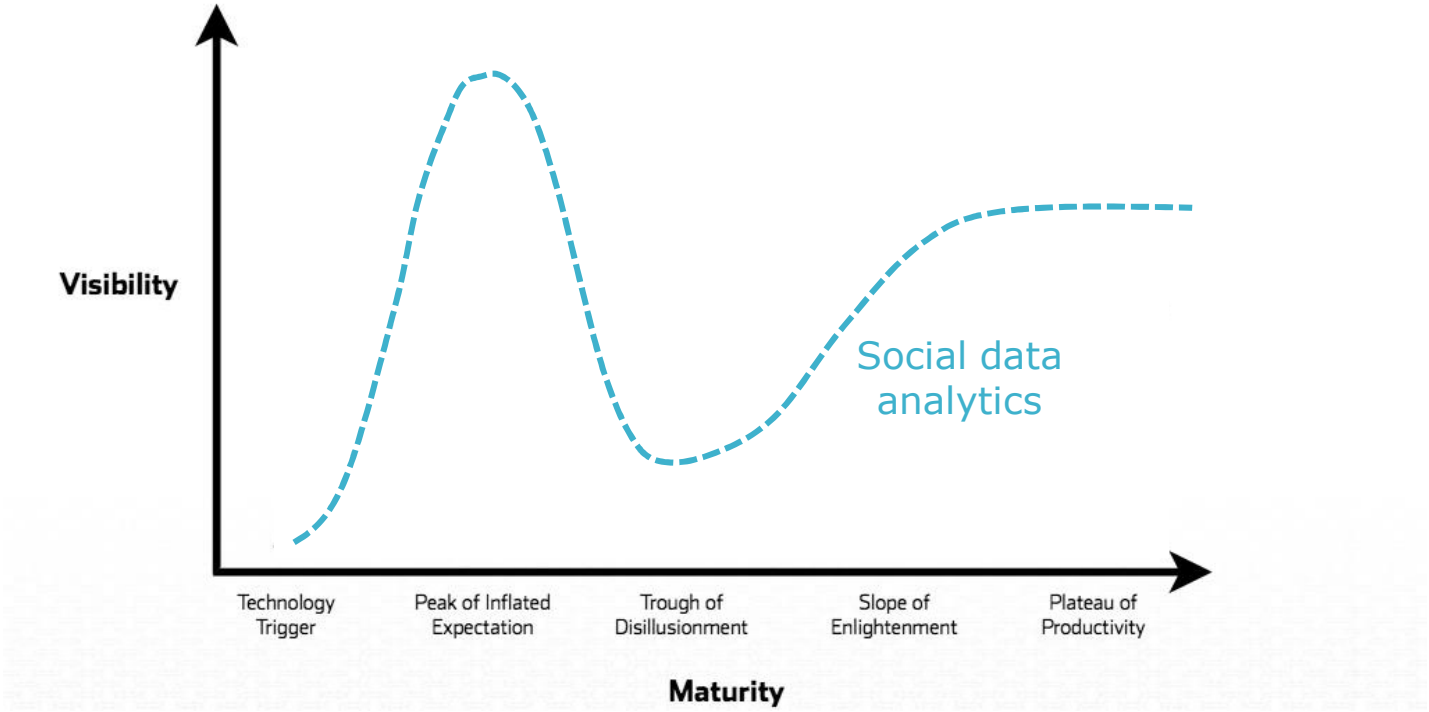
Special offers, despite being a major tactical lever, **are not cutting through.**

Business decisions delivered:
- Focus on driving salience for brand rather than price drivers
- Review on premise promotions / offers (not being noticed); consider redirecting funds elsewhere (e.g., menu visibility / at bar)

© TNS 2015

3
Social

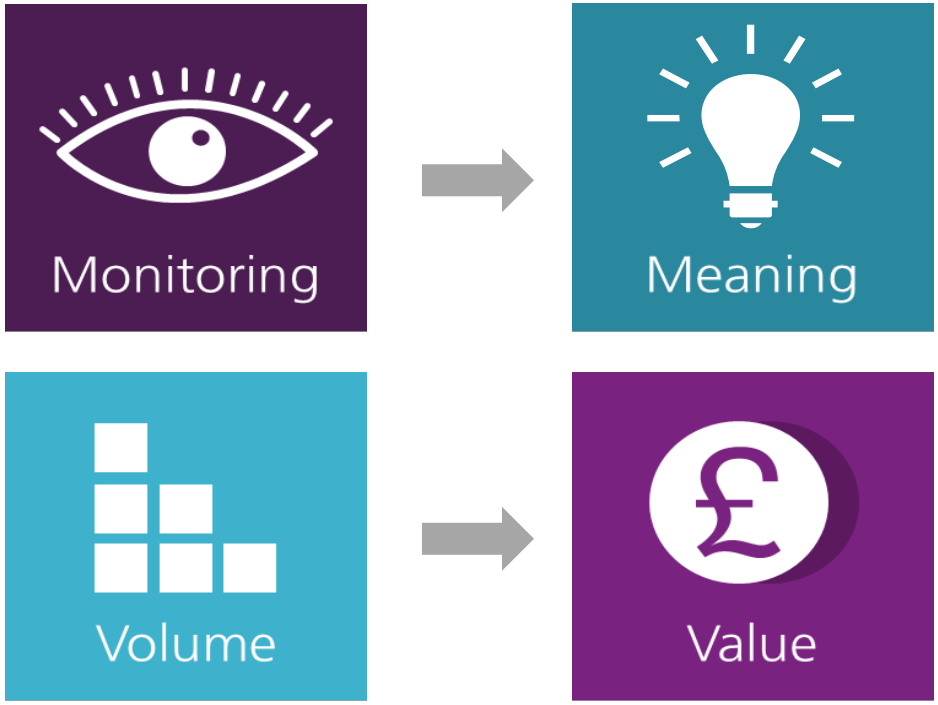
Many of us have been underwhelmed by social media



Source: Gartner

© TNS 2015

We need to move on from the superficial analyses



© TNS 2015

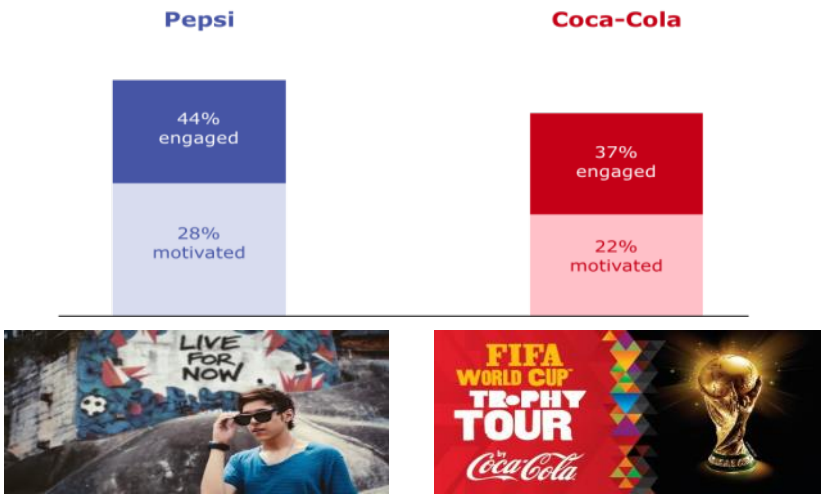
Social can be integrated into our offer in many ways, but survey infusion is the primary focus for TNS

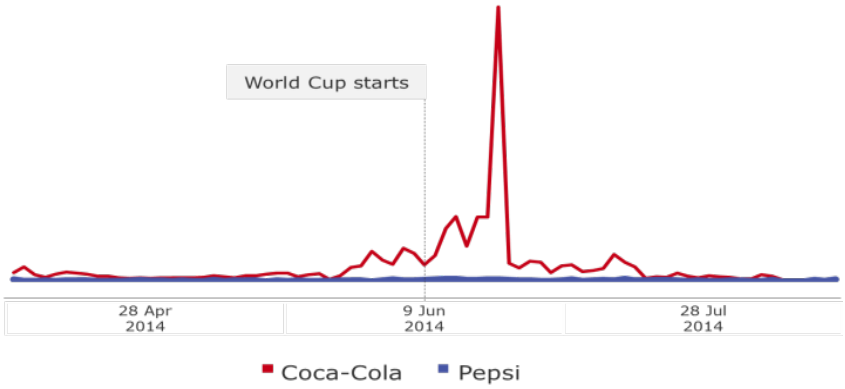
1. Social Listening	2. Buzz Typology	3. Survey Infusion	4. Incident Simulation	5. Market Prediction
✓ **listen** to social media data as research fundament	✓ **structure** social media data with communication mapping	✓ **integrate and augment** survey data with social media data	✓ **model** survey data according to social media data trends	✓ **rebuild** survey KPIs by social media KPIs
'Me-too' product	Easy to copy	Best leverages TNS thinking	Needs client involvement	Requires profound time series analysis

© TNS 2015

Case Study: Campaign evaluation
Football World Cup campaigns, UK

Pepsi ad tested better, but Coca-Cola ad was talked about more

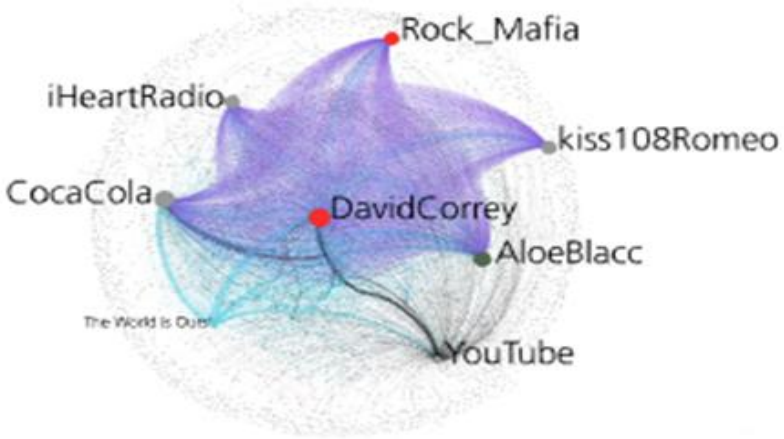




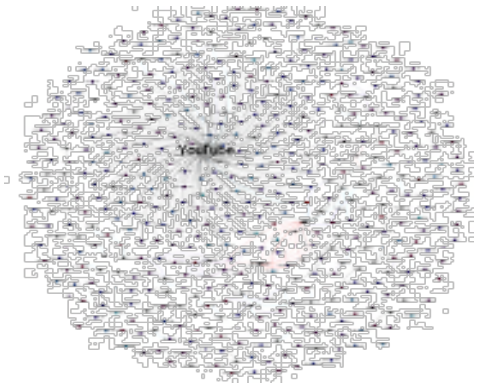
© TNS 2015

Case Study: Campaign evaluation
Football World Cup campaigns, UK

Social media analysis showed the Pepsi campaign went flat



Coke late

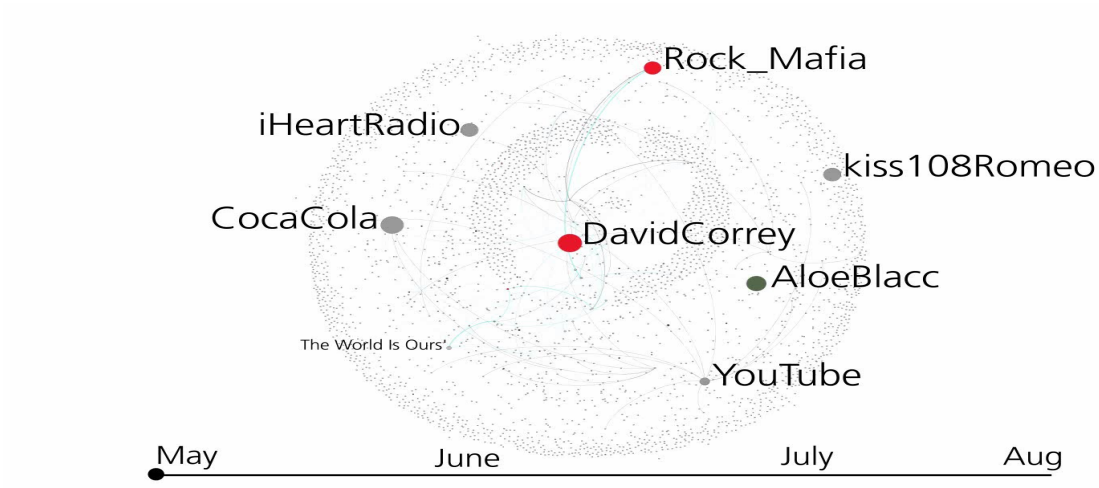


Pepsi late

© TNS 2015

Case Study: Campaign evaluation
Football World Cup campaigns, UK

By moving beyond volumetrics we're able to fully understand campaign impact



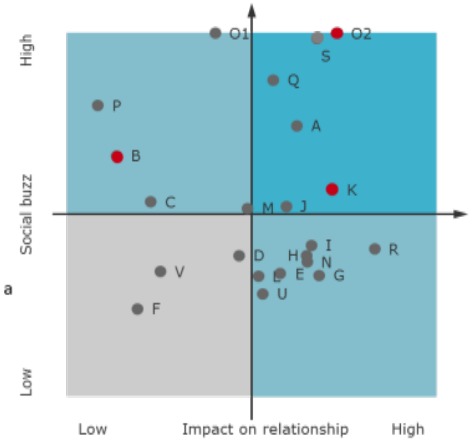
© TNS 2015

Case Study: Enriching customer understanding British Airways

Plotting touchpoint impact from survey against social buzz

B. Booking
C. Check-in
M. Baggage reclaim
O1 Punctuality
P. Lounge

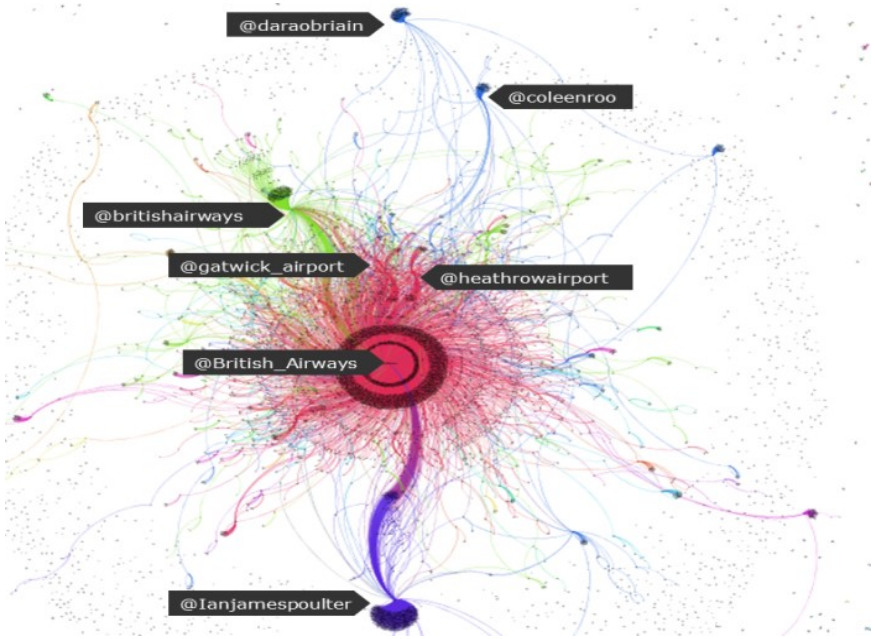
D. Ground staff
F. Passport control
Cancelling or re-booking a
V. flight



A. Search for information
J. Food & drinks
K. Crew
O2. Handling of delays
Q. Lost luggage
S. Customer Service

E. Baggage drop-off
G. At the gate
H. Boarding
I. On the plane
L. Entertainment on board
N. Pricing
R. Complaints
U. BA Website

Mapping the conversations

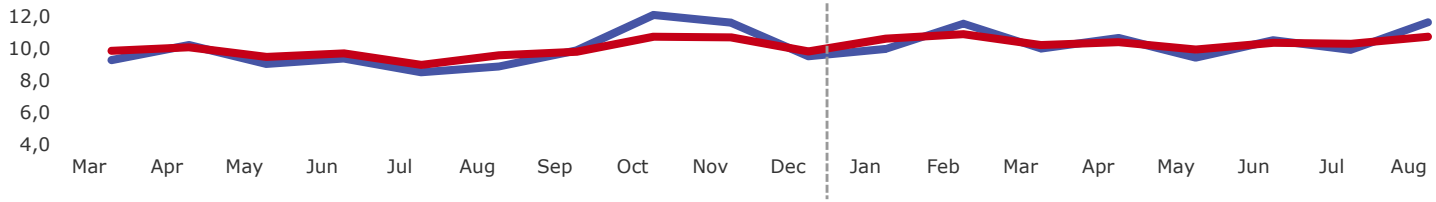


© TNS 2015

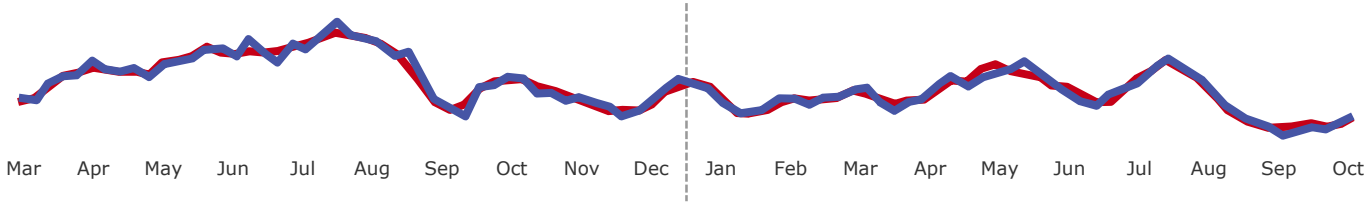
Case Study: Predict brand equity
Comparing brand tracking to social data

Brand health

Automotive Brand



Laundry Brand



Survey Social

© TNS 2015

4
Marketing to the audience of one

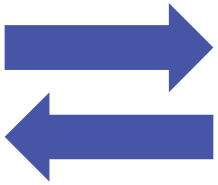
Data Management platforms are aggregating data

Purchased from 3rd party sources

(e.g. Experian, Shopcom, Mastercard etc.)

Cookies and site tracking

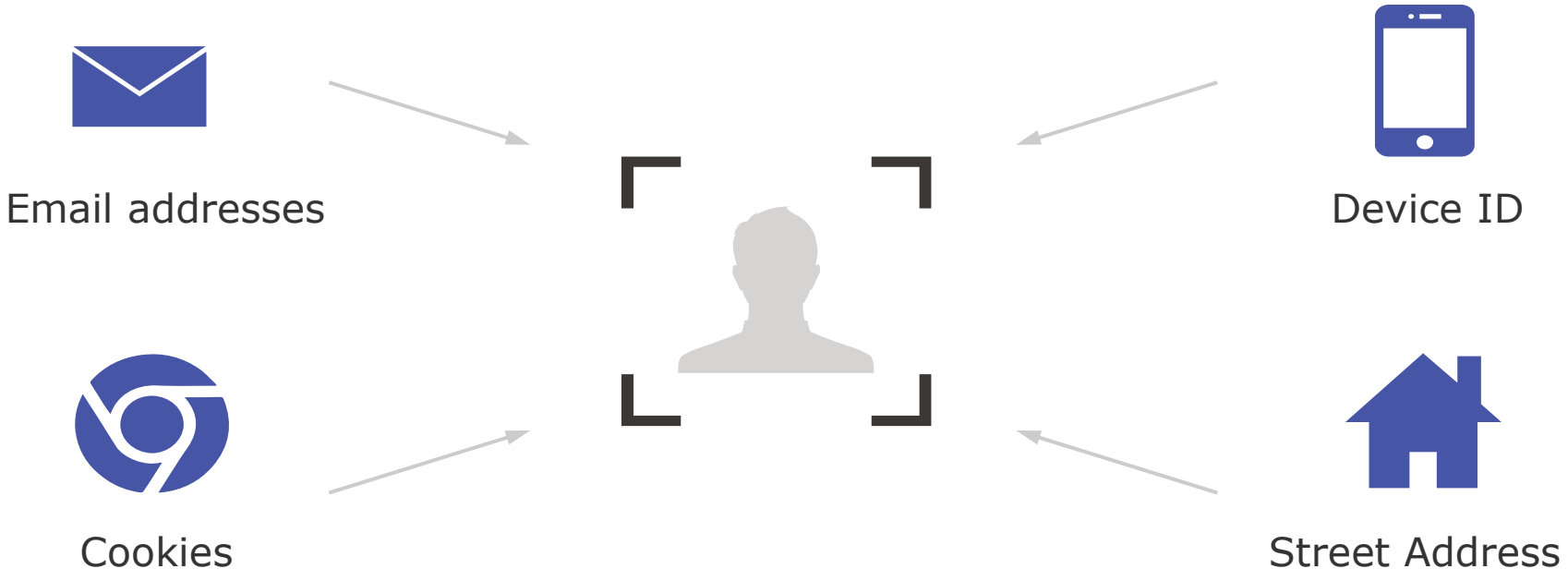
(e.g. Google Chrome)



Traded with other DMPs

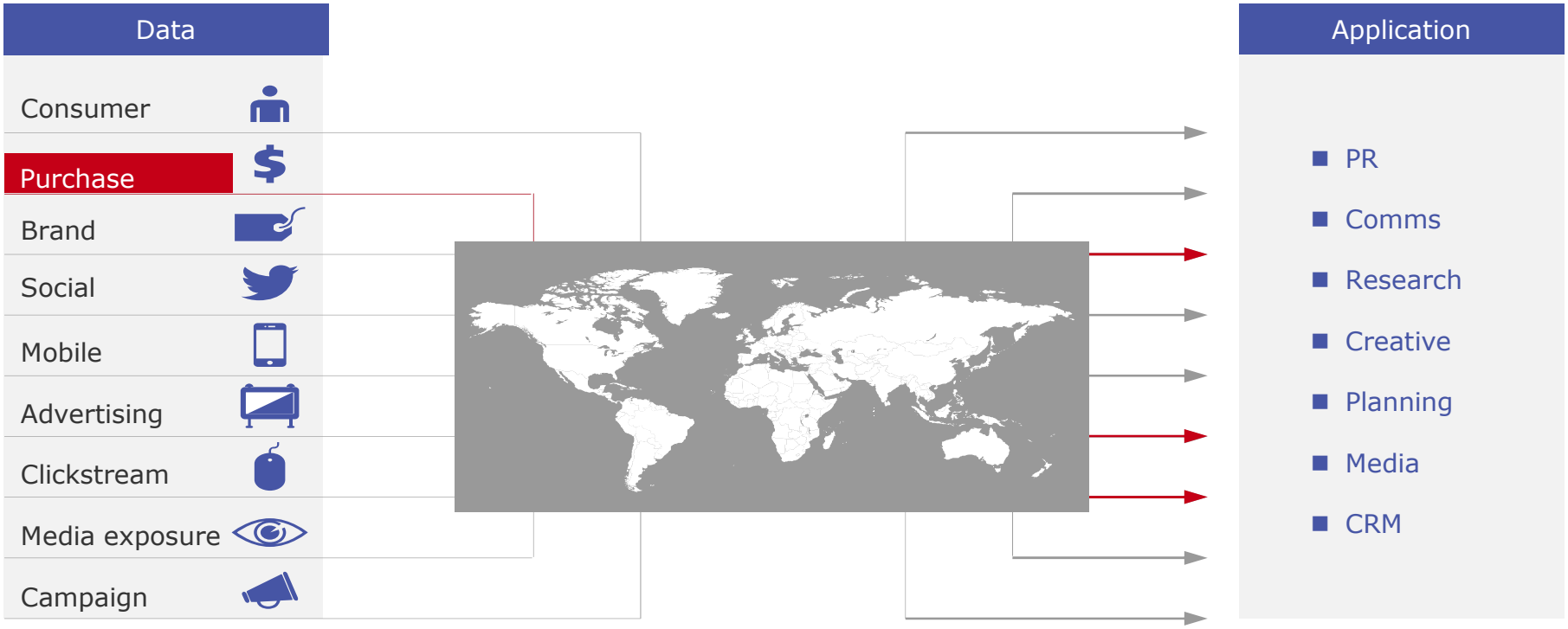
© TNS 2015

This data is being connected at the individual level



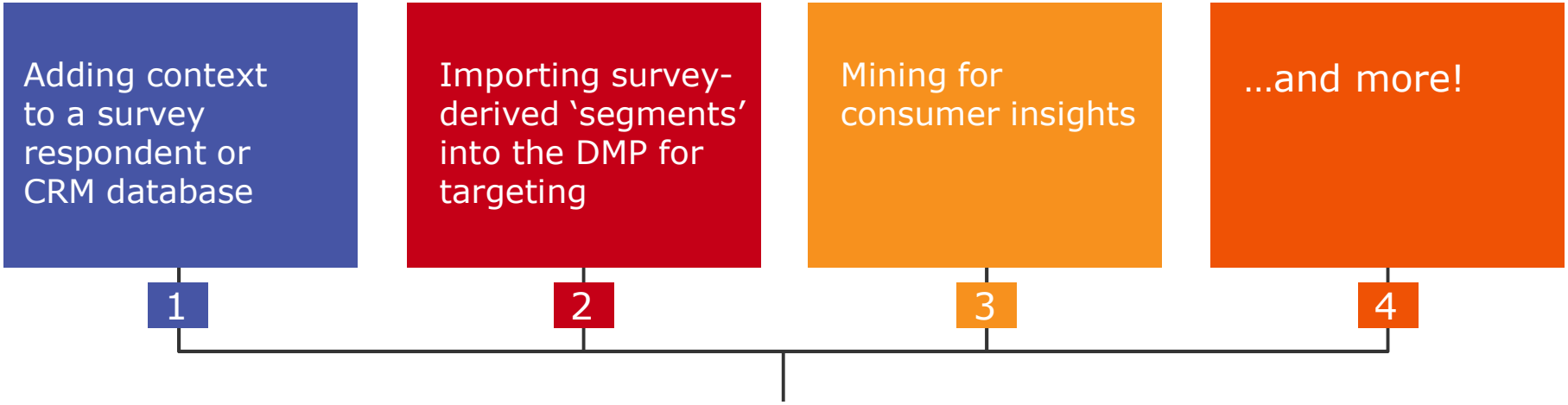
© TNS 2015

This offers us the ability to connect and leverage data like never before



© TNS 2015

There are numerous ways in which DMPs can be used for insights purposes



The possibilities are limitless – **creativity** is key here

© TNS 2015

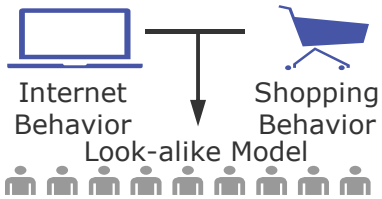
Case study:
Matching survey profiles to DMP for media targeting, USA

1

Survey to find people open to a brand

2

Profiles matched to a DMP to find 30 million similar profiles



3

The 30 million unique cookies were added to the media plan

Result
The campaign delivered 15% lift in sales (actual purchase data) for those exposed vs. an identical control group*

© TNS 2015

Get ready for the integrated, data-rich world!

© TNS 2015

5
To summarize...

Summary points

Connected Consumer

Mobile and social are there to help us make better research

TNS is investing into developing of the mobile expertise

Device-agnostic design for all surveys

Shorter, smarter

Mobile devices help us get data of better quality

Social is being integrated into the TNS offer in many ways

Survey infusion

Predicting brand equity using social data

Data management platforms

DMP are being developed to help with Integrated marketing challenges

© TNS 2015

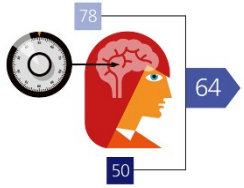
At TNS, we are releasing several mobile and social-enabled approaches in 2016

Mobile ready

Mobile diaries

Situational Equity

Connected Shopper Journey



TRIM for Mobile

Device-agnostic Conversion Model

Socially infused

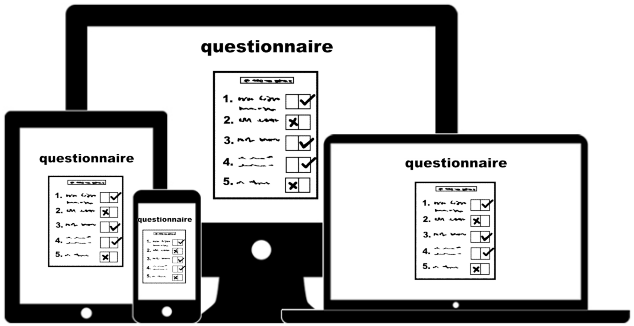
Social Conversion Model

Social TRIM

Predictive Equity Modelling

© TNS 2015

Better together: ‘traditional’ tools + mobile + social data



© TNS 2015

A dialogue with our clients to support the offer development

Safe	Experimental
Representative	Predictive
Comprehensive	Iterative
Considered	Fast
Insightful	Actionable
Independent	Co-creators
Data collection	Data acquisition & recycling

© TNS 2015

Thank you

www.conf.tns-global.ru

#tnsconf

© TNS 2015