

# BCN PEG: Surveys

---

Contact [BCNPEGStaffing@Bain.com](mailto:BCNPEGStaffing@Bain.com)



# BCN survey analytics SKUs: Choose from a range of collaboration options, starting from a quick model turnaround (1/2)



## EXCEL ANALYTICS

### SKU 1: Automated quick model

- **Automated survey tool** to quickly translate raw data to insights
- Includes **response cut for all Qs**, up to **10 basic filters** and **5 QC** criteria (open-text not covered)
- Applicable to surveys programmed on Inc-Query

- Model set-up fee dependent on N of survey Qs
- **\$1.5K** for upto 30 Qs +\$50 for each additional Q

- ~0.5 day

### SKU 2: In-depth custom model

- Model 2.0 **customized to be plug and play** for slide blanks
- **Includes complex cross-cuts**, more complex filters/ QC criteria and open-text/ verbatim analytics

- **\$3.1K per day**

- 1 – 2 days



## SLIDES

### Plug and play slide output

- Slide output that is ready to be plugged into client presentations
- Optionality to **enable automated slide updates** (discuss up-front on set-up time involved)
- Optionality for **Tableau output** (discuss up-front on timelines)

- **\$3.1K per day**  
Daily run-rate is typically 20-25 new slides, or 30-35 slide updates

- Custom (ranges from 1-3+ days)

## Scope

## BCN fees

## Timelines

Note: BCN team would be best positioned to comment on timelines/ fees once we review the scope/ specifics of the survey; SKU 1 / Quick model is built for surveys programmed on Inc-Query only

# BCN survey analytics SKUs: Choose from a range of collaboration options, starting from a quick model turnaround (2/2)

		<u>SKU 1: Automated quick model</u>	<u>SKU 2: In-depth custom model</u>
Scope	Cuts (total)	30	~60
	Standard cuts (single Q linked)	30	~50
	Cross-cuts	Up to 5	~10
	Cuts perfectly customized for slides	⊗	✓
	Filters		
	Standard filters (single Q linked)	Up to 10	Unlimited
	Complex filters (requires calculation/data cleaning)	⊗	~5
	QC		
	Built-in QC flags (single Q linked)	Up to 5	Unlimited
	Complex QC flags (requires calculation/ data cleaning)	⊗	~5
BCN fees/ timelines	Fees	<ul style="list-style-type: none"> <li>• <b>Model set-up fee</b> dependent on N of Qs</li> <li>• <b>\$1.5K for first 30 Qs</b> +\$50 for each addl. Q</li> </ul>	
	Timelines	<ul style="list-style-type: none"> <li>• ~0.5 day (dependent on N of questions)</li> </ul>	<ul style="list-style-type: none"> <li>• 1 day for scope outlined above</li> <li>• Additional cross-cuts at run-rate of ~30-35/day, charged at \$3.1K per day</li> </ul>

Note: BCN team would be best positioned to comment on timelines/ fees once we review the scope/ specifics of the survey; SKU 1 / Quick model and increased volume in SKU 2 is applicable for surveys programmed on Inc-Query only

# Beyond analytics: BCN can collaborate across survey value chain and own all key activities from questionnaire design, testing/ coding and analytics (cutter/ slides)

## Pre-launch: Survey design

Survey design and vendor onboarding

- **Create Survey Questionnaire**

- Work with Case Manager to develop survey draft using case objective/ investment thesis
- Liaison with AAG for expert inputs

- **Coordinate and select Survey Vendor**

- Consider key criteria for shortlisting: panel requirements, budget, timelines, etc.

## Testing and soft launch

Survey logic testing and course correction

- **Finalize Survey Coding and Launch**

- Check quotas on panel respondents
- Test initial survey link based on a defined checklist to ensure accurate logic flows

- **Soft Launch Survey to get sample data**

- Test soft launch data to ensure respondents are able to interpret questions accurately
- Adjust survey based on soft launch feedback

## Post launch: Analytics & Insights

Data analysis, insights and output generation

- **Design Survey blank loop**

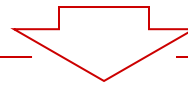
- Incorporate key analysis/ cuts based on overall storyline and investment thesis

- **Set up Survey Analytics Model**

- Build dynamic excel model with easy navigation
- Ensure dynamic data updates, flexibility to toggle various filters, flags to identify fraudulent responses etc.

- **Prepare Final Client Deliverables**

- Excel based CFR model
- Full slide output OR Tableau dashboard including analysis and visualization



**Embed a BCN team to own the survey workstream end-to-end**  
**Contact [BCNPEGStaffing@Bain.com](mailto:BCNPEGStaffing@Bain.com)**

# Appendix / BCN PEG Surveys

## **QC BDPs**

How to guide on identifying/  
eliminating bots/ fake responses

## **Blanks**

Off-the-shelf blanks

# Key ways to identify bots / cheat respondents | Open-text QC

## QUALITY CHECKS

## OPEN-TEXT QS

/ NOT EXHAUSTIVE

### Repeated answers across respondents

#### Description

- Different respondents with the exact same verbatim
  - Answer can be repeated in a different open-text question/ brand
  - Set threshold to ~20 characters or above

#### Example

Respondent ID Why did you buy this product?  
 1 There was a 10% discount on the xyz website  
 2 Because the price was right  
 3 There was a 10% discount on the xyz website

### Public information copied

- Respondent copying text from the company / other website

Respondent ID Why this NPS score?  
 1 Babyzen YOYO2 Folds & Unfolds in a Moment While You Hold Your Baby & Can be Worn on the Shoulder. For Parents Who Need to Fold Their Stroller at Home, Hop on a Bus, Take a Train or Plane  
 2 Very durable stroller. Easy to clean, handles really well. Comfortable for a growing child

### Different language used

- Respondent answering in a different language vs. survey language
  - Past example: ~20% responses in a German survey answered free text responses in Dutch

Respondent ID Language Text input Question  
 1 English The product is very reliable  
 2 English Ich liebe dieses Produkt  
 3 English I like the design

### Imitated responses

- Fake brand from aided awareness question mentioned by respondent in unaided awareness (free-text) question
  - Indicates that respondent had access to the survey Q

Respondent ID Brand 1 Brand 2 Brand 3  
 1 Mylan Cybex Egg  
 2 Easywalker Mamas Cybex  
 3 Cybex Stokke iCandy  
 r) Mylan [TAG: US:GB:DE:fake]  
 s) PureTech [TAG: US:GB:DE:fake]

### Similar writing style

- Different respondents have the same set of brands in unaided awareness with minor alterations in order, coupled with similar responses for drivers of NPS

Respondent ID Brand 1 Brand 2 Brand 3 Why did you buy this product?  
 1 Brand A Brand B Brand C IT HAS A GOOD QUALITY  
 2 Brand B Brand C Brand A IT HAS A AWSOME  
 3 Brand A Brand C Brand B IT IS A REALLY AWESOME  
 4 Brand A Brand B Brand C IT IS A COOL  
 5 Brand B Brand A Brand C IT HAS A GOOD  
 6 Brand A Brand C Brand B IT HAS A COOL

**Note:** Cheaters / bots typically make slight alterations in the text due to which QC based formulas might not be exhaustive.

# Key ways to identify low quality respondents | Open-text QC

## QUALITY CHECKS

## OPEN-TEXT QS

/ NOT EXHAUSTIVE

### Non-relevant brands

#### Description

- Irrelevant brands mentioned e.g., answer related to software in the survey related to consumer goods

#### Example

Respondent ID	Brand 1	Brand 2	Brand 3
1	Lego	Amazon	Troop
2	Baby jogger	Mamas and papas	Silver cross
3	kidskraft	moon	hartan

### Same answer across questions

- Same answers across multiple open text question (within a single respondent)

Respondent ID	Why do you like product A?	Why do you like product B?
1	Because it's the best	Because it's the best
2	OK	OK
3	I like the size	I like the size

### Non-meaningful answer

- Gibberish answers/ Non-relevant answer
- Monosyllabic answers which don't (clearly) answer the question
  - Example: Good in drivers of NPS

Respondent ID	Open text
1	asdzckashdgy
2	gasdjagsdjyg
3	The product is very reliable
Respondent ID	Why did you buy this product?
1	The design convinced me
2	The price was right
3	The weather in Paris is nice
Respondent ID	What software do you use?
1	Windows
2	Office chair
3	Microsoft Office
Respondent ID	Why this NPS score?
1	because it has a great features
2	good
3	My Baby fell comfort with here, and this brand is best for my







**Note:** As a standard approach we don't blacklist low quality open text responses if they're not being flagged under any other QC criteria




# List of QC Flags | Open text questions

## QUALITY CHECKS

## OPEN-TEXT QS

/ PRELIMINARY

Flag	Criticality	Description	Time investment
	<div> <div>Yellow Flag</div> <div>Red Flag</div> </div>		
Unrealistic numbers	Red Flag	Unrealistic values in open-text number write-ins; e.g. 20 strollers purchased for a child	
Open-text straightlining	Yellow Flag	Same text answer provided by the same respondent across different open-text questions	
Fake brand in unaided	Red Flag	Respondent mentioning fake brand (from aided list) in the preceding unaided awareness question (bot/ cheater)	
Language check	Yellow Flag	Respondent open-text response in different language vs. survey language (bot/ cheater)	
Same open-text across diff. resp.	Red Flag	Same text answer provided by different respondents. (bot/ cheater) <u>Threshold</u> : Text contains at last 20 letters <u>Caveat</u> : Text may be repeated in different questions (different columns in raw dataset); bots may use spelling mistakes	
Open text – Manual scan (not exhaustive)	Red Flag	<ol style="list-style-type: none"> <li>Copy-pasted answer from the company website or other survey questions (e.g. KPC)</li> <li>Repeat respondents (same unaided brands with different order; similar writing style in reasoning-related questions)</li> <li>Low quality/ gibberish / not relevant answer</li> </ol>	

 Quick win
  Mid level / requires refreshing
  High / Manual

**Note:** Number / type of QC flags and robustness is subject to survey purpose/ target audience. Reach out to [BCNPEGStaffing@Bain.com](mailto:BCNPEGStaffing@Bain.com) to discuss specific cases
















# List of QC Flags | Fixed response questions

## QUALITY CHECKS

## FIXED RESPONSE QS

/ PRELIMINARY

<div> <div>Yellow Flag</div> <div>Red Flag</div> </div>			
Flag	Criticality	Description	Time investment
Speeder	Red Flag	Respondent completing survey quicker than 40-50% of median completion time	
Fake vendor	Red Flag	Respondent citing “considered/ used” any of the fake brands	
Brand awareness	Yellow Flag	Respondent aware of all/ 90% aided brands. <u>Threshold</u> : Typically used for surveys with 15+ brands/ competitors	
Usage inconsistency	Yellow Flag	Respondent cites “currently using” for a particular brand, but unaware of any specific products of the same brand	
Straightliners	Yellow Flag	Respondent providing same answers in matrix type questions (e.g. same rating for a brand across all KPCs; same level of likelihood across several following questions; same NPS for all brands)	
Switching mismatch	Yellow Flag	Respondent selecting “switched in the past” but has no brand selected under “Used in the past, but not anymore” in the awareness funnel	
High share of “IDK”	Yellow Flag	Respondent with high share of “I don’t know” responses across multiple question. <u>Threshold</u> : 4-5 questions	
Age check	Yellow Flag	1) Respondent age and birth year not matching. <u>Caveat</u> : Keep the two questions apart - presumably at the beginning and end 2) Respondent indicating unusually low/high age OR mismatch in age and experience	
HH income check	Yellow Flag	1) Mismatch of spending level and income (ratio) 2) Respondent indicating unusually low/high income	
Other (case specific)	Yellow Flag	Respondent mentioning contradictory answers across diff. questions	
			<div>  Quick win            Mid level / requires refreshing            High / Manual         </div>

**Note:** Number / type of QC flags and robustness is subject to survey purpose/ target audience. Reach out to [BCNPEGStaffing@Bain.com](mailto:BCNPEGStaffing@Bain.com) to discuss specific cases

# Appendix / BCN PEG Surveys

## **QC BDPs**

How to guide on identifying/  
eliminating bots/ fake responses

## **Blanks**

Off-the-shelf blanks

## A G E N D A

### Demographics

---

NPS

---

KPC

---

Awareness and usage

---

Switching

---

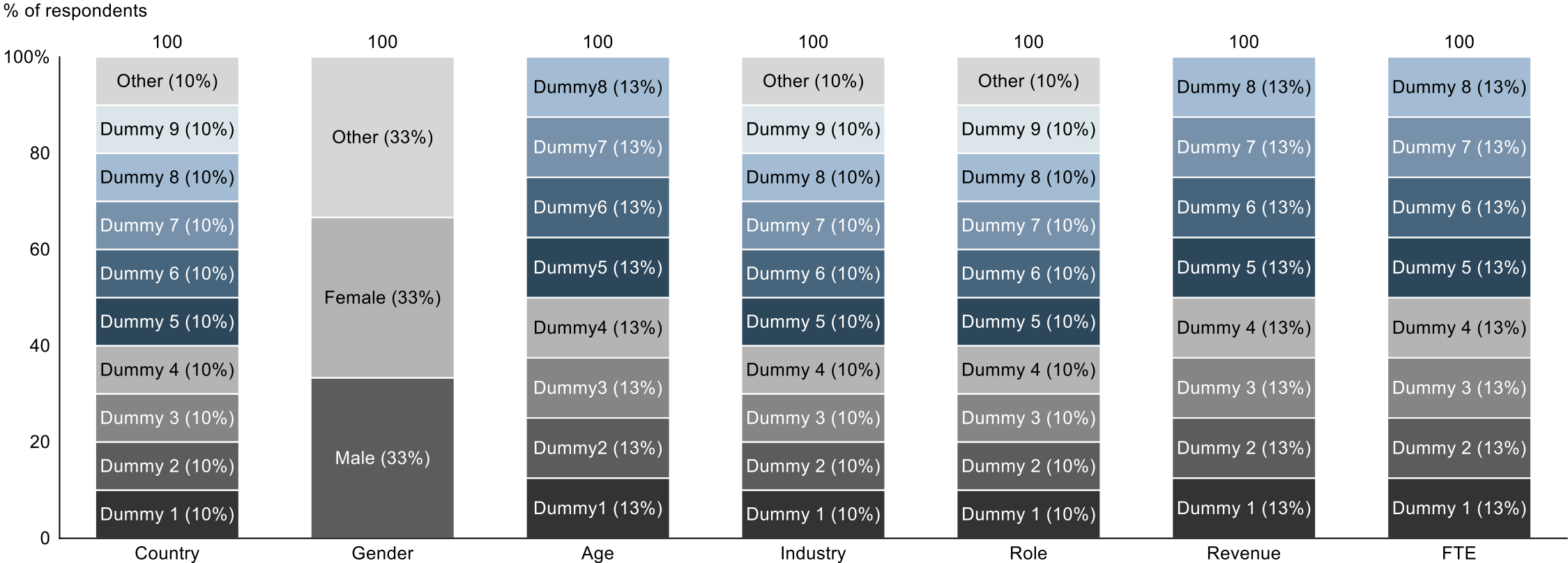
Price, Spend and SOW

# Demographics: Survey covers a diverse set of respondents across scale and industry groups

## DEMOGRAPHICS

/ PRELIMINARY

Q: In which country are you currently employed? Q: What is your gender? Q: How old are you? Q: Which of the following best describes the industry of your company? Q: Which of the following best describes your current role? Q: Approximately, what was your organization's total revenue in USD during 2021 Q: How many employees does your company approximately have globally?



Note:  
Source:

# Demographics: Survey covers a diverse set of respondents across gender, age, location, income and ethnic groups

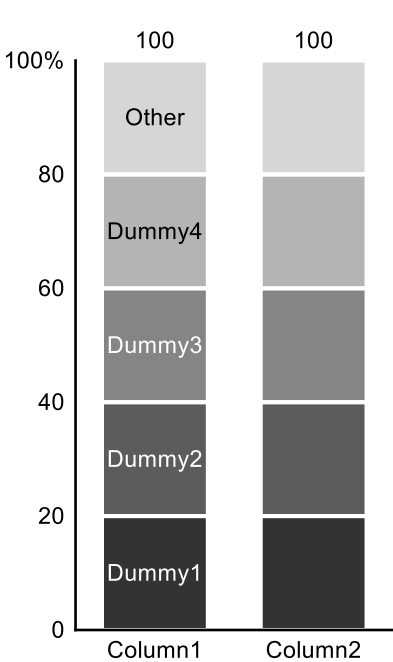
## DEMOGRAPHICS

/ PRELIMINARY

### Country

Q: In which country are you currently employed?

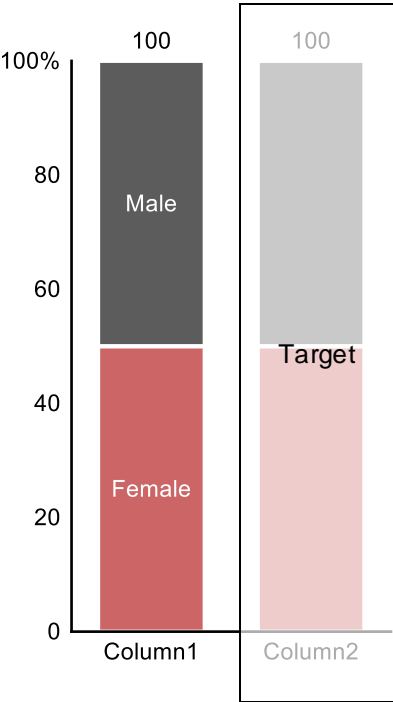
Location by province (%)



### Gender

Q: What is your gender?

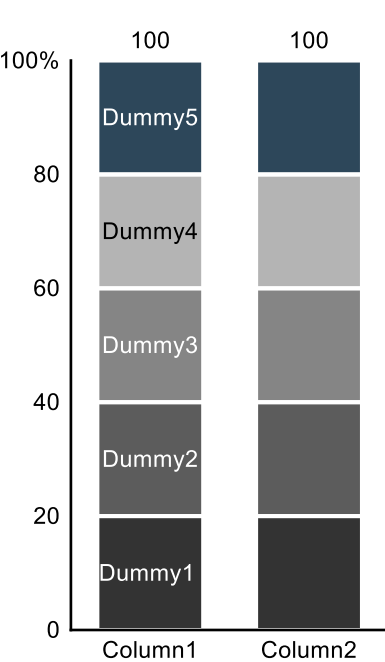
Gender distribution (%)



### Age

Q: How old are you?

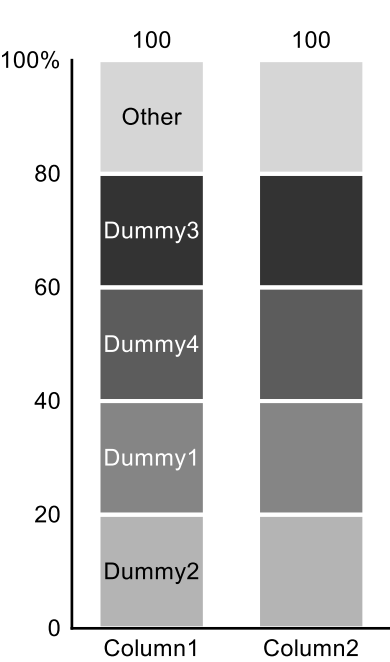
Age distribution (%)



### Industry

Q: Which of the following best describes the industry of your company?

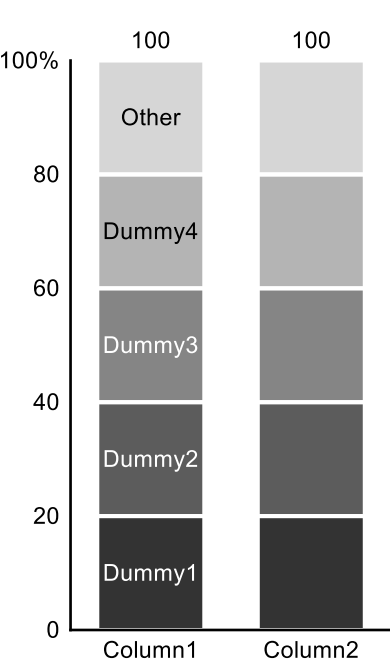
Industry distribution (%)



### Role

Q: Which of the following best describes your current role?

Role distribution (%)



Note:  
Source:

## A G E N D A

Demographics

---

**NPS**

---

KPC

---

Awareness and usage

---

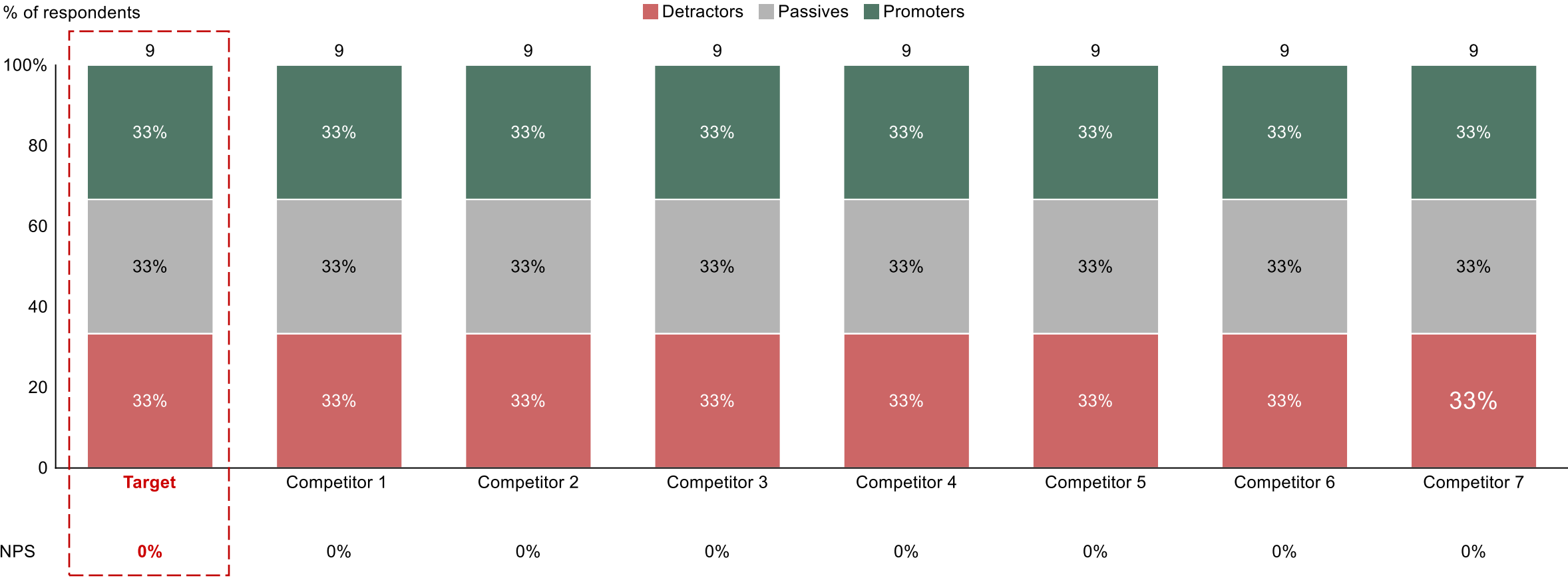
Switching

---

Price, Spend and SOW

# Customer Advocacy: X middle of the pack on customer advocacy with ~X% NPS

Q: How likely are you to recommend <provider> to a colleague?



Note: Others and brands with N<X are hidden  
Source:

# Customer Advocacy: X's promoters praise x, y and z

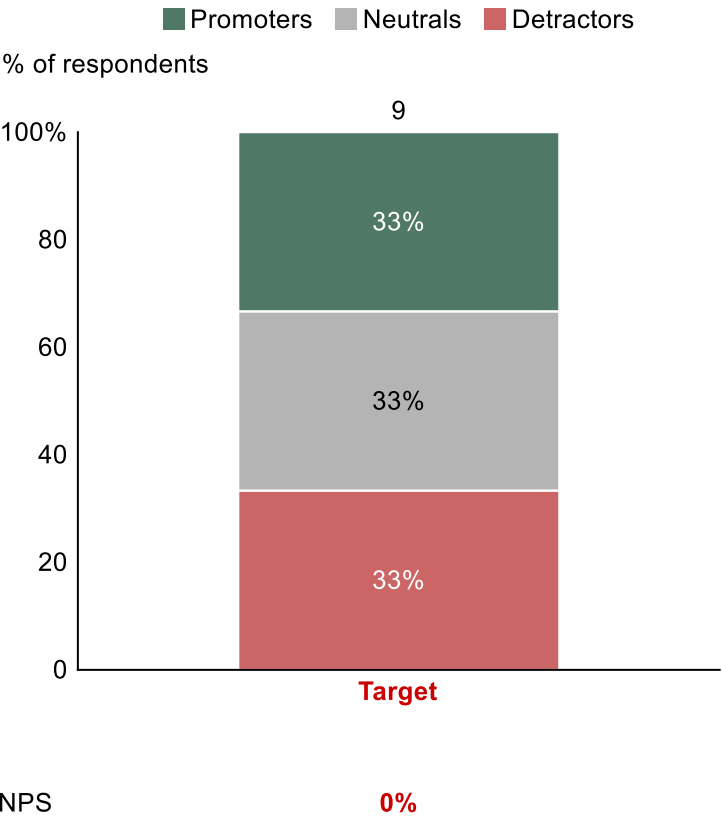
ADVOCACY

NPS - DRIVERS

/ X ONLY / PRELIMINARY

## [Brand] NPS

Q: How *likely* are you to **recommend** <provider> to a colleague?



## NPS Commentary

Q: What are the **primary reasons** you gave **X** a score of <score>?

Promoters	<div>“Very <b>strong products, expertise</b> and data usage.”</div> <div>“Meets our <b>business needs.</b>”</div> <div>“<b>Amazing customer service.</b> Campaign insights and projections throughout the entire process. Able to sign an MSA with them to remove all minimum campaign spend thresholds.”</div> <div>“<b>Easy to work with.</b> They manage expectations well. <b>Fair pricing.</b>”</div>
Neutrals	<div>Blank – not updated</div> <div>“High impact formats and results are good.”</div> <div>“Happy with the <b>ROI.</b>”</div> <div>“Strong <b>multi-channel capabilities.</b> Good <b>insights available,</b> including audience analysis.”</div>
Detractors	<div>“Good service but <b>not so transparent.</b>”</div>

Source:

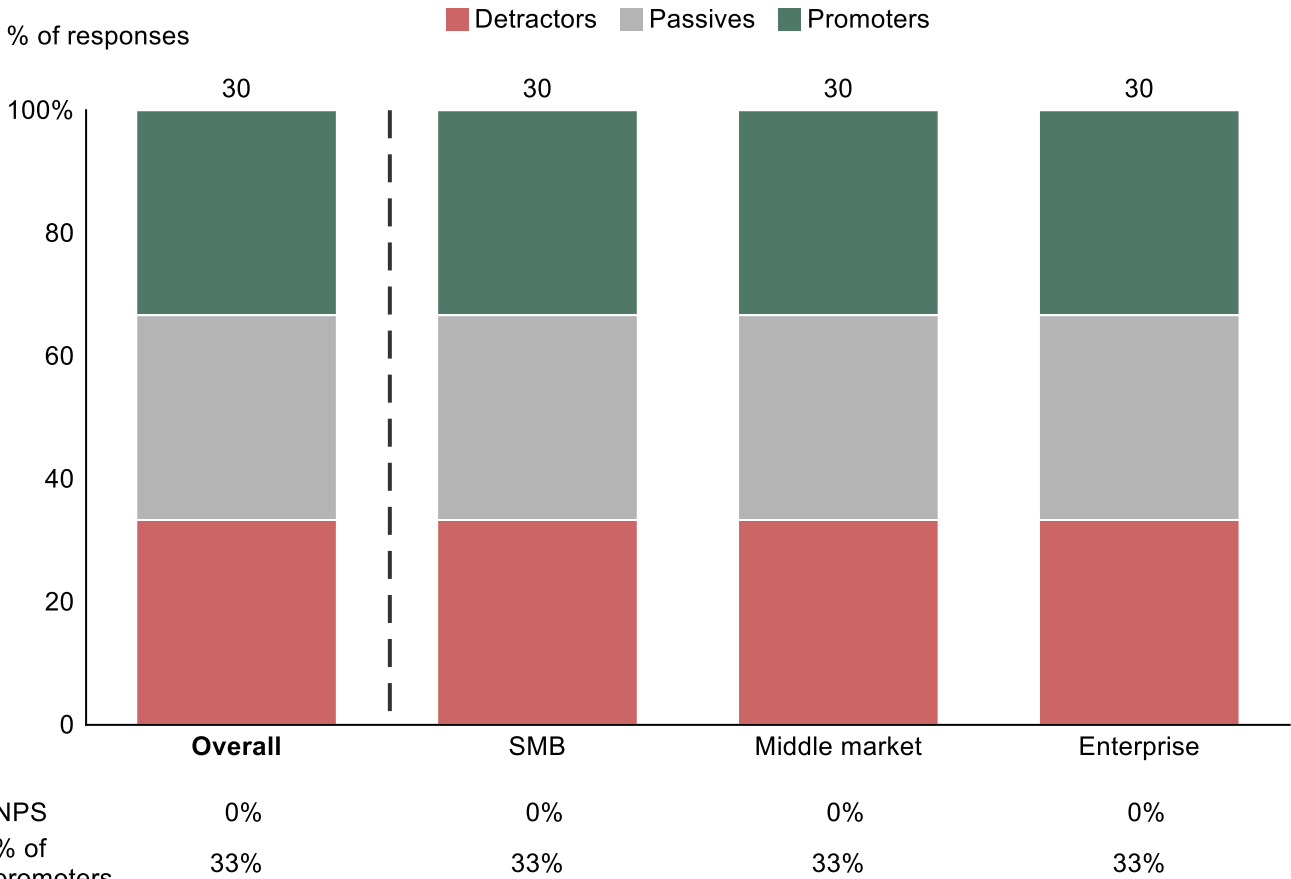


# Customer Advocacy: X performs best among [segment]; lags among Z driven by criticism of X

ADVOCACY      NPS - DRIVERS

## NPS

Q: How likely are you to recommend X to a colleague or industry peer for its solution?



Note:  
Source:

/ DIRECTIONAL / PRELIMINARY

## Commentary

Q: Why?











Client	Country	NPS	Voice of the client
Financial services SMB*	N/A	9	"During the initial implementation <b>there is a higher number of false positives.</b> "
Public Services SMB		8	" <b>Ease of use. Low human overhead</b> in managing the solution."
Technology SMB		8	" <b>Lower up-front investment.</b> "
Energy SMB		8	" <b>Reliable solution.</b> "
Telecom SMB*		8	" <b>Takes a lot of tweaking to set up</b> according to your specific needs."
Transportation SMB		7	" <b>Ease of use</b> compared to others. Most important - <b>support provided.</b> "
Chemicals SMB*	N/A	7	"You are able to monitor but <b>can't stop suspicious activity</b> with the software."
Consulting SMB		5	" <b>Expensive</b> , either need internal staff for the product or engage their SoC."
Retail SMB		5	" <b>Not decided if the cost is worth it</b> , we are likely to re-eval by year-end."
Technology SMB		4	" <b>Suspicious, it does not scale without remote services.</b> "

# Promoters | Users cite x, y and z alongside good overall experience

ADVOCACY

NPS - DRIVERS

/ DIRECTIONAL / PRELIMINARY

Respondent	Country	Industry	NPS	Voice of the client
Travel & hospitality SME		• Systems integration	10	"They <b>saved me</b> at our platform integration project after <b>Deloitte failed</b> . I am a strong supporter as <b>they really deliver</b> , also on the <b>backend</b> where Deloitte failed."
Large technology company		• Not specified	10	"Pelican delivered good <b>implementation</b> ."
Large manufacturing company		• Not specified	9	"Very <b>knowledgeable and service-oriented</b> and strive towards the target in a <b>quick and efficient</b> manner."
Very large manufacturing company		• Not specified	8	"Good overall <b>experience</b> ."
Small company		• Not specified	8	<b>Blank – not updated</b>
Energy SME		• Not specified	7	"We are working with them now and have <b>good experiences</b> ."
Logistics SME		• Not specified	5	"Pelican offered <b>good solutions</b> , showed mainly <b>good commitment</b> , they want and <b>engage in finding solutions</b> that suit us."
Small manufacturing company		• Not specified	5	"Pelican offered <b>good service</b> ."
Logistics SME		• Not specified	4	"Very <b>knowledgeable and service-oriented</b> and strive towards the target in a <b>quick and efficient</b> manner."
Large bank		• Not specified	4	"Great service provider, <b>good price/value</b> offering, <b>strong customer support</b> ."

Note:  
Source:

## A G E N D A

Demographics

---

NPS

---

**KPC**

---

Awareness and usage

---

Switching

---

Price, Spend and SOW

# KPC: Indexed importance

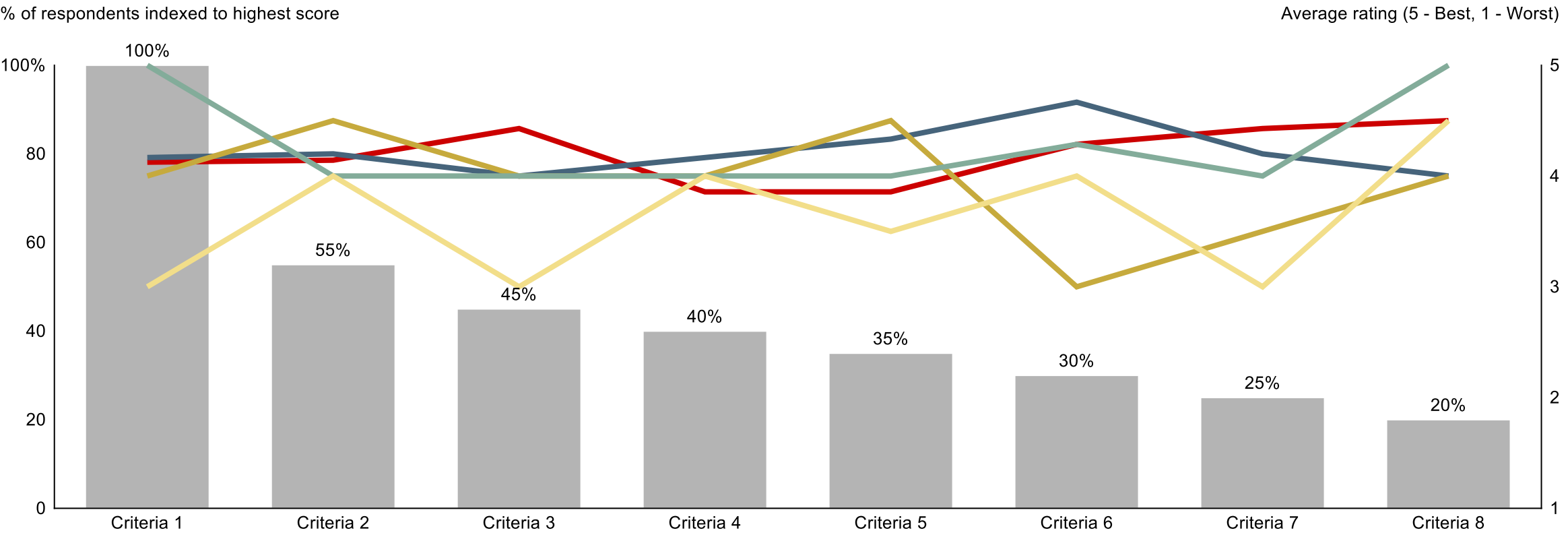
## KEY PURCHASING CRITERIA

/ PRELIMINARY

Q: What are **the most important criteria** when evaluating whether or not to use a particular provider?  
Q: For Dummy do you **rank their performance against the below criteria**?

Dummy Brand 1 Dummy Brand 2 Dummy Brand 3 Dummy Brand 4 Dummy Brand 5

Adding (N = XXX) for each brand optional



Source:

This information is confidential and was prepared by Bain & Company solely for the use of our client; it is not to be relied on by any 3rd party without Bain's prior written consent

# KPC: Criteria importance not indexed (% of respondents)

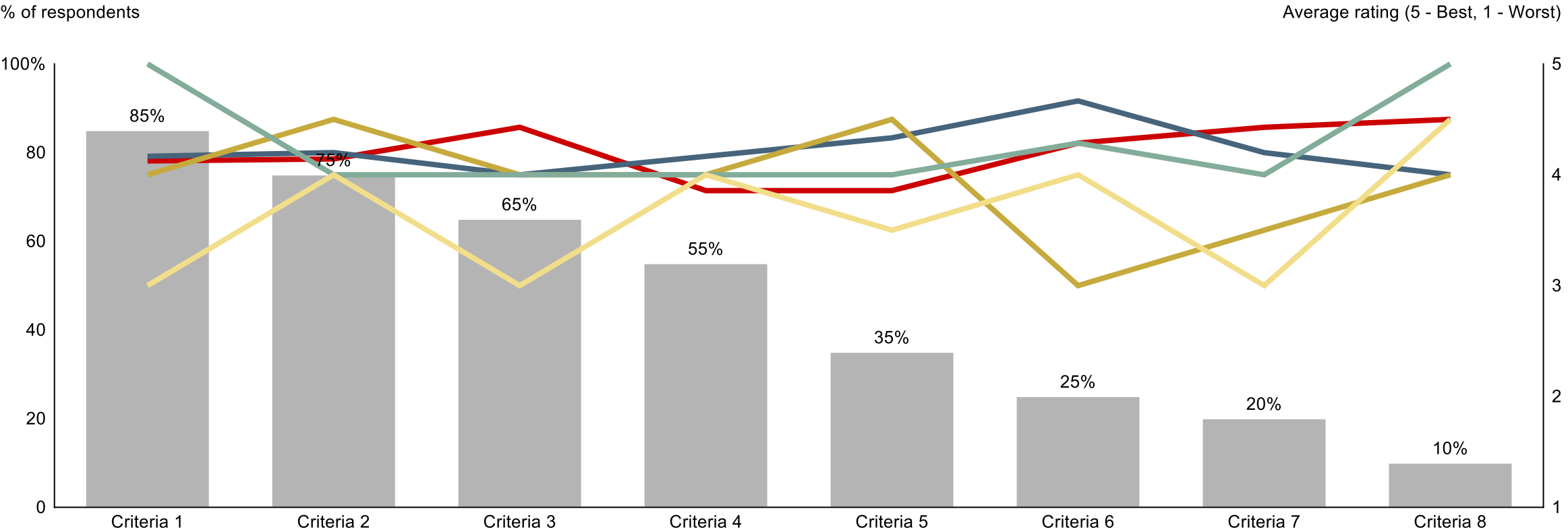
## KEY PURCHASING CRITERIA

/ PRELIMINARY

Q: What are **the most important criteria** when evaluating whether or not to use a particular provider?  
Q: For Dummy do you **rank their performance against the below criteria**?

Dummy Brand 1 Dummy Brand 2 Dummy Brand 3 Dummy Brand 4 Dummy Brand 5

Adding (N = XXX) for each brand optional



Source:

# KPC: Criteria importance not indexed (% of respondents) - Ranked

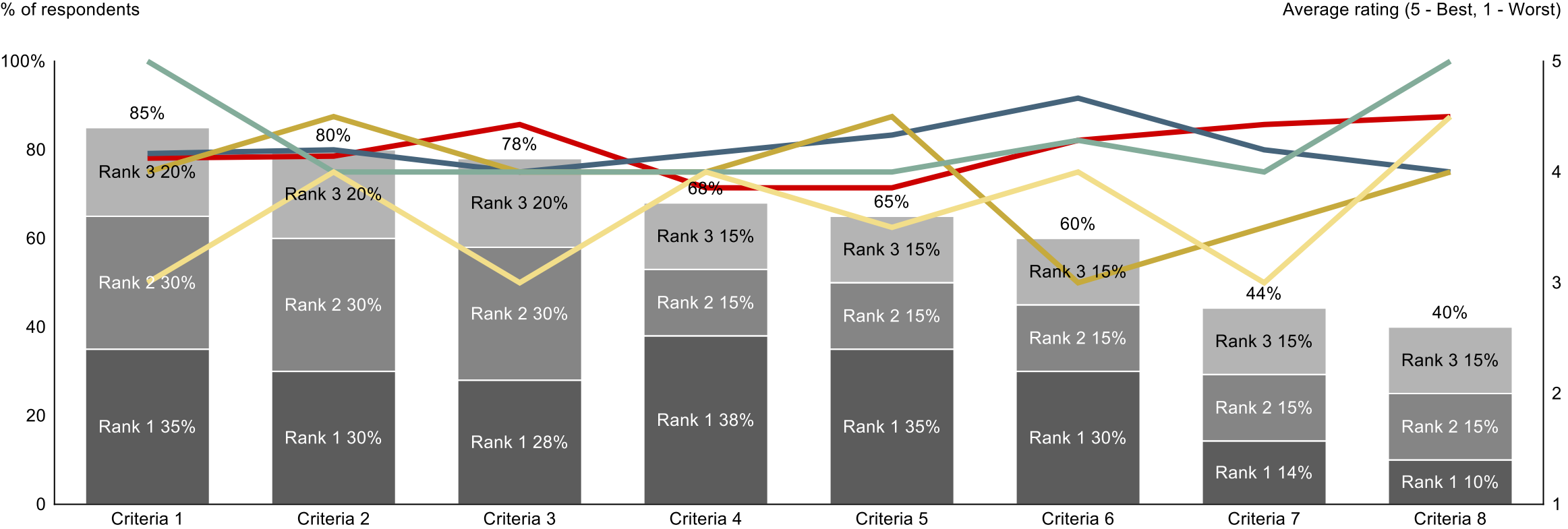
## KEY PURCHASING CRITERIA

/ PRELIMINARY

Q: What are **the most important criteria** when evaluating whether or not to use a particular provider?  
Q: For Dummy do you **rank their performance against the below criteria**?

Dummy Brand 1 Dummy Brand 2 Dummy Brand 3 Dummy Brand 4 Dummy Brand 5

Adding (N = XXX) for each brand optional



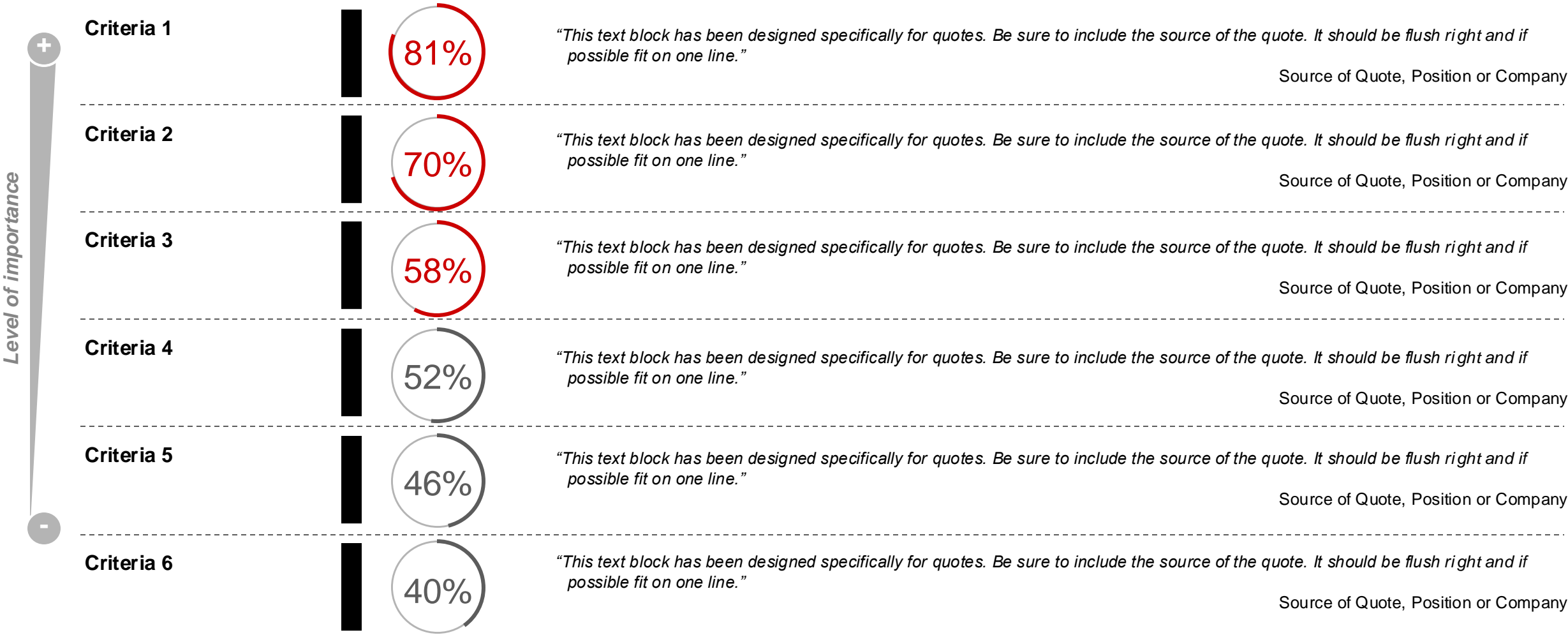
Source:

# KPC: Top KPCs include...

K P C      T O P   K P C

/ D I R E C T I O N A L / P R E L I M I N A R Y

Q: Please choose the **most important factors** for you when selecting selecting an aesthetic medicine clinic:



Note: Top 6 KPCs shown  
Source:

# KPC: Segment level KPC

KPC DETAILED VIEW

/ PRELIMINARY

Q: Please rank the 5 most important criteria you use when selecting a payment service provider for Direct Debit payments?  
Q: Which of the following best describes your company's industry?

Purchasing criteria	Overall (N=XX)	Small business (N=XX)	Emerging (N=XX)	Corporate (N=XX)	Enterprise (N=XX)
Criteria 1	<div><div></div>100%</div>	<div><div></div>100%</div>	<div><div></div>100%</div>	<div><div></div>100%</div>	<div><div></div>100%</div>
Criteria 2	<div><div></div>99%</div>	<div><div></div>99%</div>	<div><div></div>99%</div>	<div><div></div>99%</div>	<div><div></div>99%</div>
Criteria 3	<div><div></div>93%</div>	<div><div></div>93%</div>	<div><div></div>93%</div>	<div><div></div>93%</div>	<div><div></div>93%</div>
Criteria 4	<div><div></div>93%</div>	<div><div></div>93%</div>	<div><div></div>93%</div>	<div><div></div>93%</div>	<div><div></div>93%</div>
Criteria 5	<div><div></div>96%</div>	<div><div></div>96%</div>	<div><div></div>96%</div>	<div><div></div>96%</div>	<div><div></div>96%</div>
Criteria 6	<div><div></div>68%</div>	<div><div></div>68%</div>	<div><div></div>68%</div>	<div><div></div>68%</div>	<div><div></div>68%</div>
Criteria 7	<div><div></div>87%</div>	<div><div></div>87%</div>	<div><div></div>87%</div>	<div><div></div>87%</div>	<div><div></div>87%</div>
Criteria 8	<div><div></div>79%</div>	<div><div></div>79%</div>	<div><div></div>79%</div>	<div><div></div>79%</div>	<div><div></div>79%</div>
Criteria 9	<div><div></div>53%</div>	<div><div></div>53%</div>	<div><div></div>53%</div>	<div><div></div>53%</div>	<div><div></div>53%</div>
Criteria 10	<div><div></div>55%</div>	<div><div></div>55%</div>	<div><div></div>55%</div>	<div><div></div>55%</div>	<div><div></div>55%</div>

Note: Indexed score based on weighting of responses (weights: rank 1 = 5, rank 2 = 4, rank 3 = 3, rank 4 = 2, rank 5 = 5)  
Source:



# KPC: KPC performance per competitor

K P C      C O M P E T I T O R S

/ D I R E C T I O N A L / P R E L I M I N A R Y

Q: How would you rate <brand> on the following criteria?

+             -  Level of importance	KPC	Importance (% of resp)	Target	Competitor 1	Competitor 2	Competitor 3	Competitor 4	Competitor 5	Competitor 6	Commentary
	Criteria 1	81%	4.1	4.4	4.3	4.2	4.1	3.8	3.6	Blank – not updated
	Criteria 2	70%	4.0	4.8	4.0	3.9	4.1	3.9	3.9	
	Criteria 3	58%	3.5	2.9	3.9	4.1	3.3	3.6	3.8	
	Criteria 4	52%	4.0	4.3	4.3	3.8	4.1	2.0	3.3	
	Criteria 5	46%	4.1	4.4	4.3	3.8	4.5	3.7	3.5	
	Criteria 6	40%	4.1	4.3	3.5	4.1	4.2	3.3	3.7	
	Criteria 7	36%	4.2	4.0	4.5	4.3	3.5	3.4	4.2	
	Criteria 8	33%	4.2	4.5	4.2	2.0	4.7	4.1	4.3	
	Criteria 9	29%	4.1	4.0	3.5	4.0	3.1	4.3	3.6	
	Criteria 10	19%	4.3	3.5	4.0	3.5	3.8	4.0	5.0	
	Criteria 11	15%	3.9	3.8	5.0	3.4	3.5	3.3	4.0	
	Criteria 12	0%	3.7	4.0	4.0	3.8	3.7	3.4	-	
Average score			4.0	4.3	4.1	4.0	3.9	3.8	3.8	
Number of respondents			80	50	50	50	50	50	50	

Note:  
Source:

Extremely well (4.5-5)    Well (4.0-4.4)    Neutral (3.0-3.9)    Poor (<=3)

## A G E N D A

Demographics

---

NPS

---

KPC

---

**Awareness and usage**

---

Switching

---

Price, Spend and SOW

# Awareness funnel: X clear leader on brand awareness and usage followed by Y

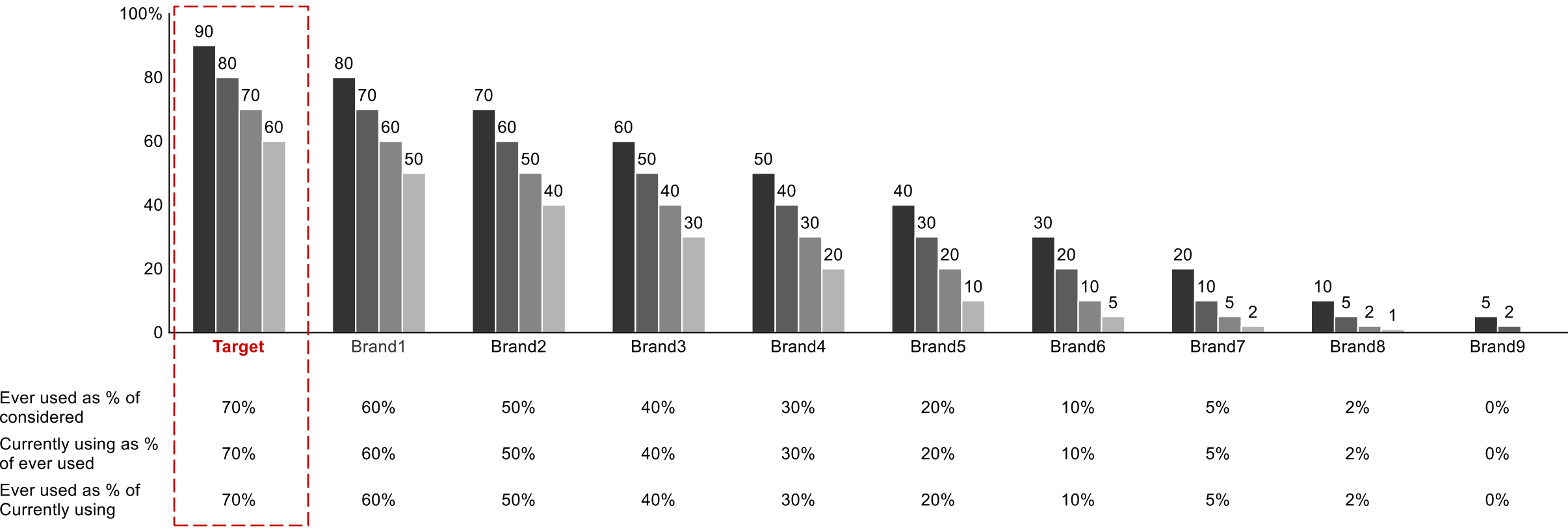
AWARENESS

/ PRELIMINARY

Q: Please indicate your familiarity with each of the following vendors:

% of respondents (N=x)

Aware Considered Ever used Currently using



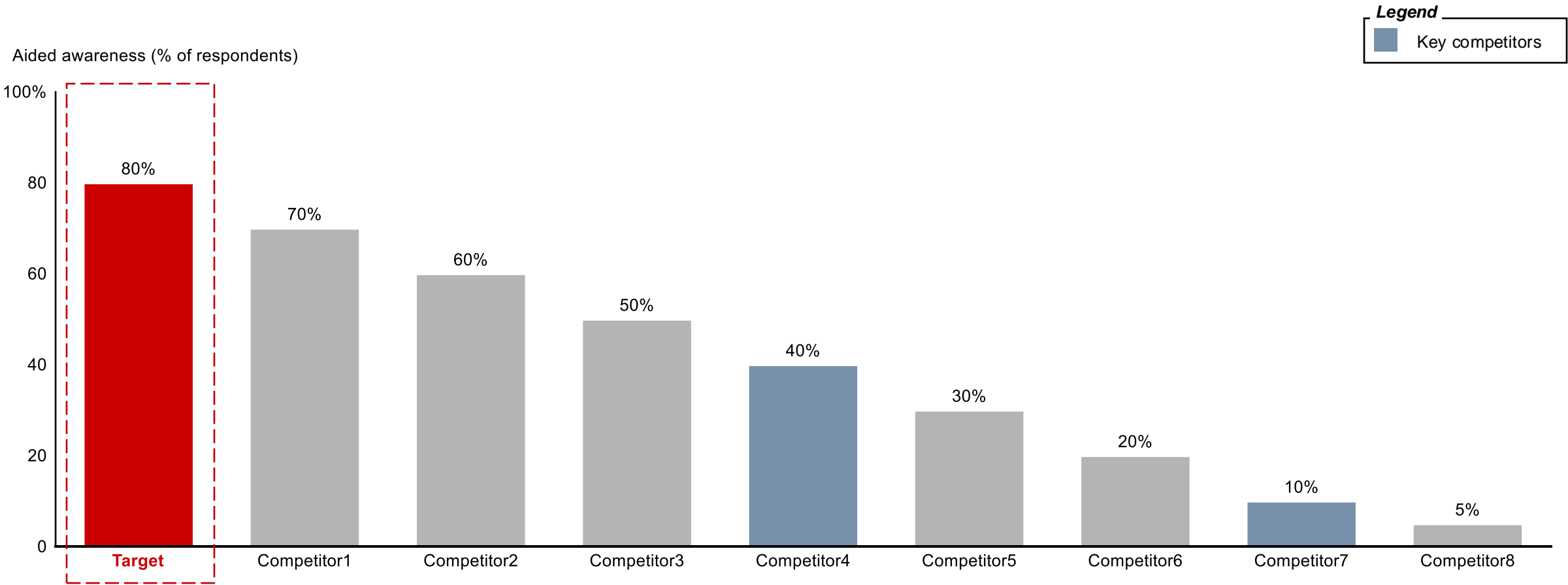
Note:  
Source:

# Aided awareness: X clear leader on brand awareness followed by Y

AWARENESS

/ PRELIMINARY

Q: Which of the following brands **do you know**?



Note:  
Source:

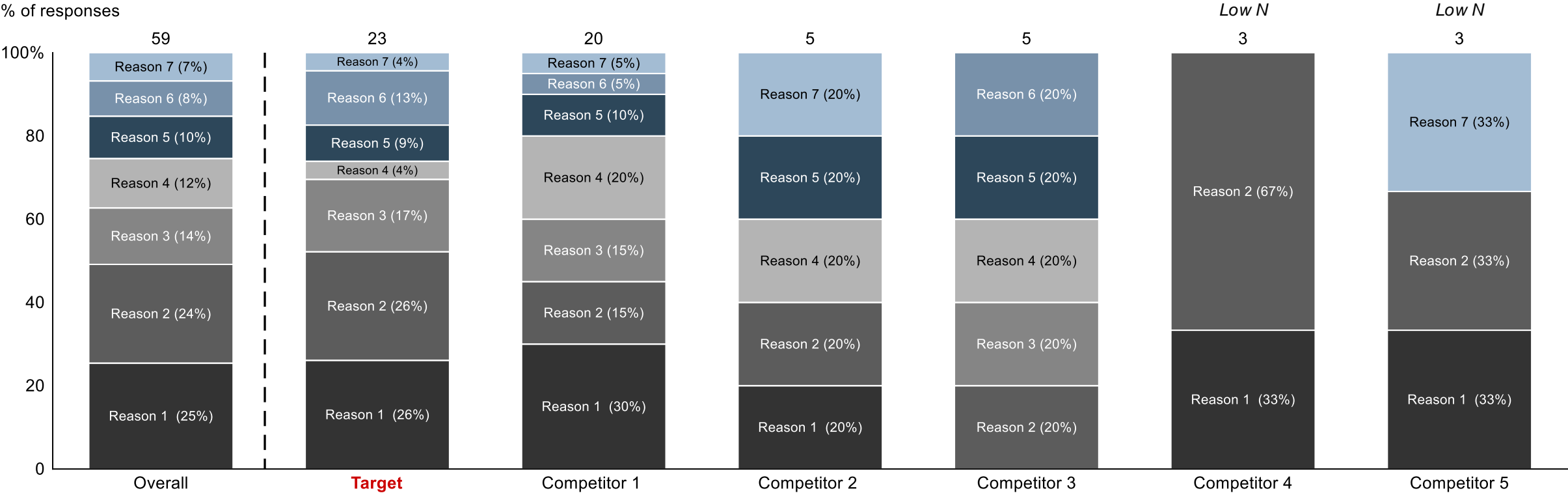
# Reasons to use: X and Y key factors influencing vendor selection; Z relatively more important for [target brand] customers

USAGE

REASONS TO USE

/ PRELIMINARY

Q: Please select and rank up to 3 reasons for choosing <provider>



Note: : 'I don't know / Prefer not to answer' answers not shown  
Source:

# Use cases: Target used primarily for Channel XX and XX

Q: For each of your top (up to) 5 Programmatic Advertising managed services provider(s) by % of spend, can you please select the channels and capabilities that you are using them for?

Channels/sources	Target N = XX	Competitor 1 N = XX	Competitor 2 N = XX	Competitor 4 N = XX	Competitor 5 N = XX	Competitor 6 N = XX
Channel 1	38%	50%	0%	50%	33%	100%
Channel 2	50%	33%	17%	25%	0%	50%
Channel 3	88%	83%	67%	100%	67%	100%
Channel 4	63%	50%	17%	50%	33%	0%
Channel 5	75%	83%	83%	75%	0%	100%
Channel 6	63%	67%	33%	100%	33%	50%
Channel 7	75%	83%	17%	100%	100%	50%
Channel 8	75%	100%	50%	100%	0%	100%
Channel 9	50%	50%	50%	50%	67%	0%
Channel 10	63%	83%	50%	75%	33%	100%

Note: Table values represent % of respondents selecting each channel option  
Source:

Legend

0-20%

21-40%

41-60%

61-70%

71-85%

86-100%

# Non-users: x% non-users likely to begin use X in 3 years; Non-X users cite x and y as the main reasons for non-usage

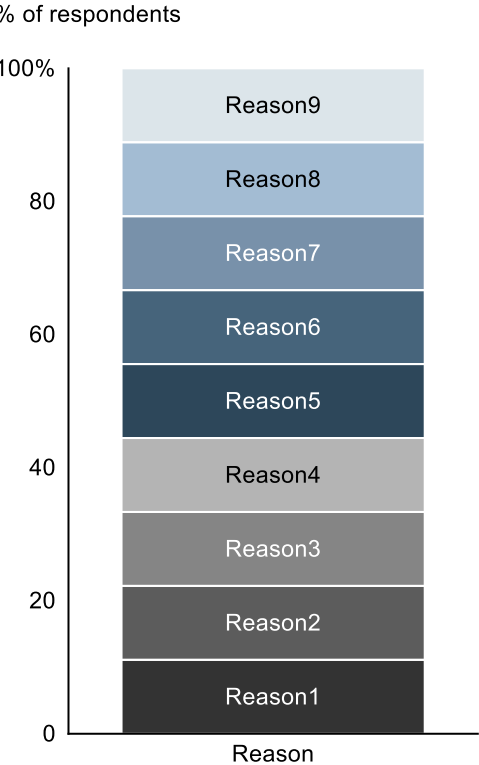
USAGE

NON-USERS

/ DIRECTIONAL / PRELIMINARY

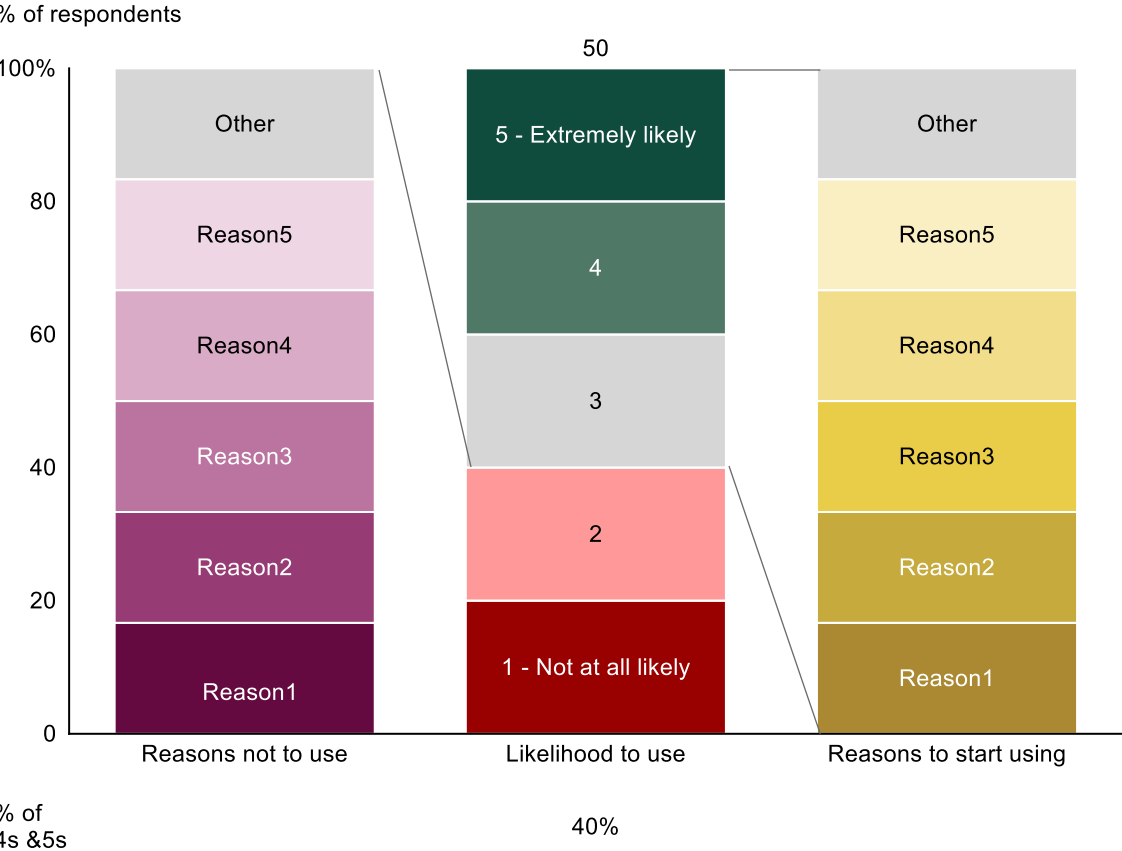
**Reason for not using**

*Q: Why does your company not currently use X solution? Select up to 3 options.*



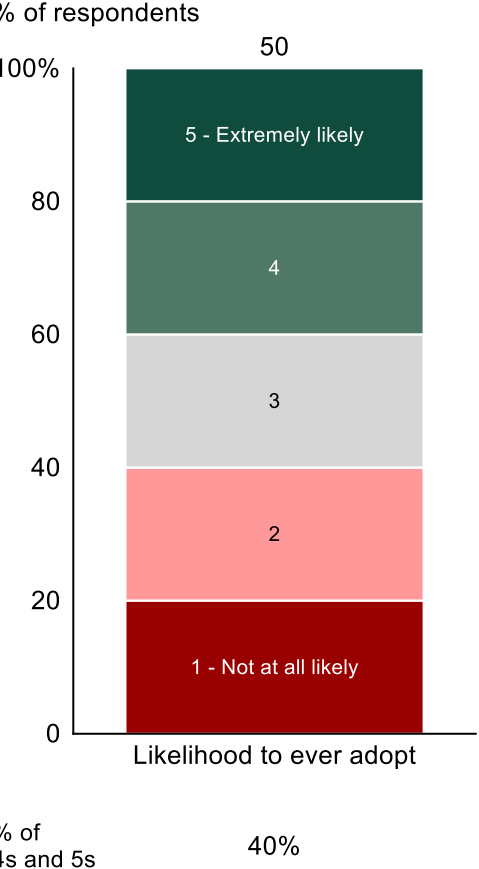
**Likelihood to use in the next 3 years**

*Q: How likely is your company to begin using X solution in the next 3 years? Why likely? Why unlikely?*



**Likelihood to ever adopt**

*Q: How likely is your company to ever adopt X solution?*



Note:  
Source:

## A G E N D A

Demographics

---

NPS

---

KPC

---

Awareness and usage

---

**Switching**

---

Price, Spend and SOW

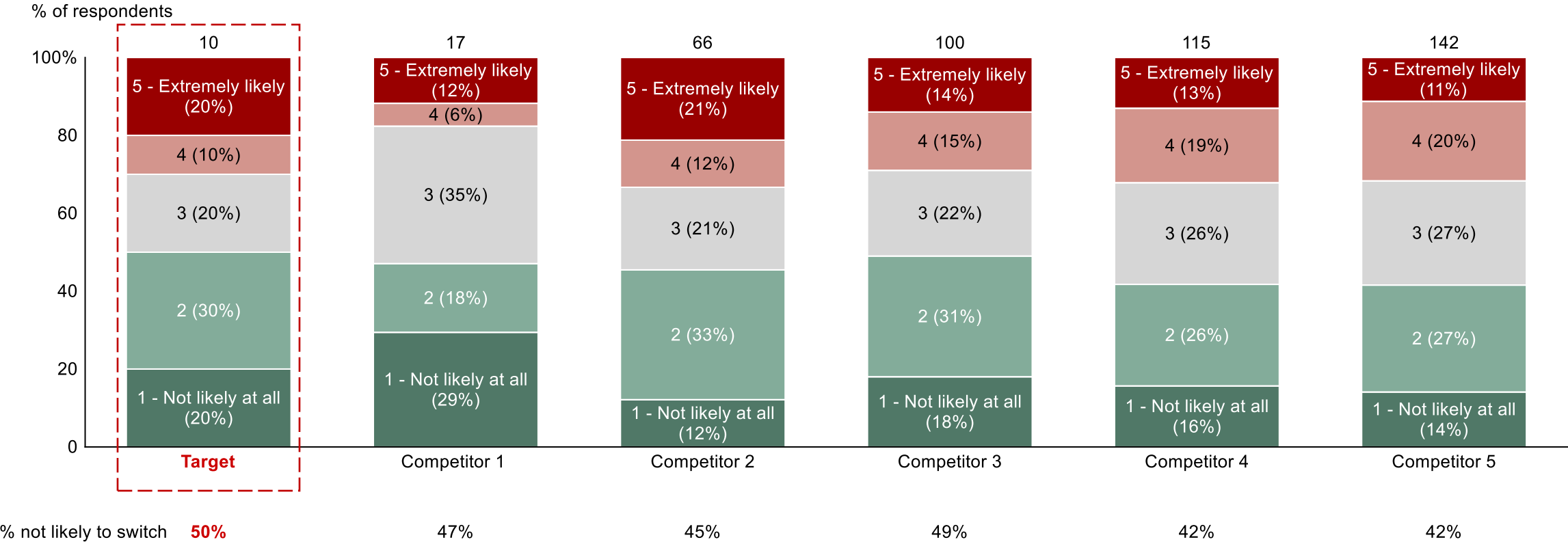


# X% unlikely to switch, having higher customer loyalty

## LIKELIHOOD TO SWITCH

/ PRELIMINARY

Q: How *likely* are you *to switch away* from using <vendor>?



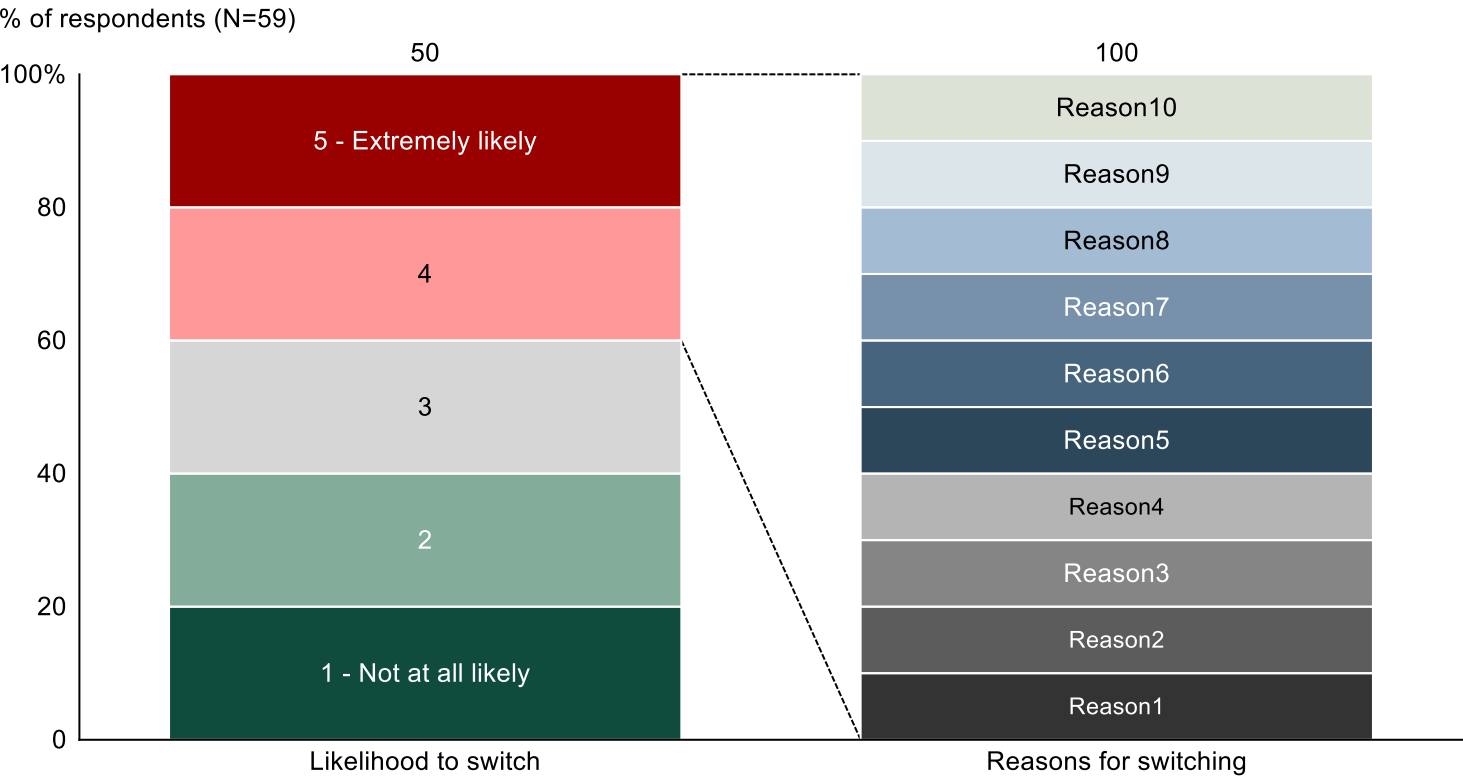
Source:

# ~x% customers using X as primary provider indicate they're likely to switch in the next 3 years

## FUTURE SWITCHING

### X users unlikely to switch to other vendors

**Q:** How likely is your company to **switch from X** in the next 3 years?; **Q:** What are the **main reasons** your company is likely to switch from **X** in the next 3 years? Please select up to 3.



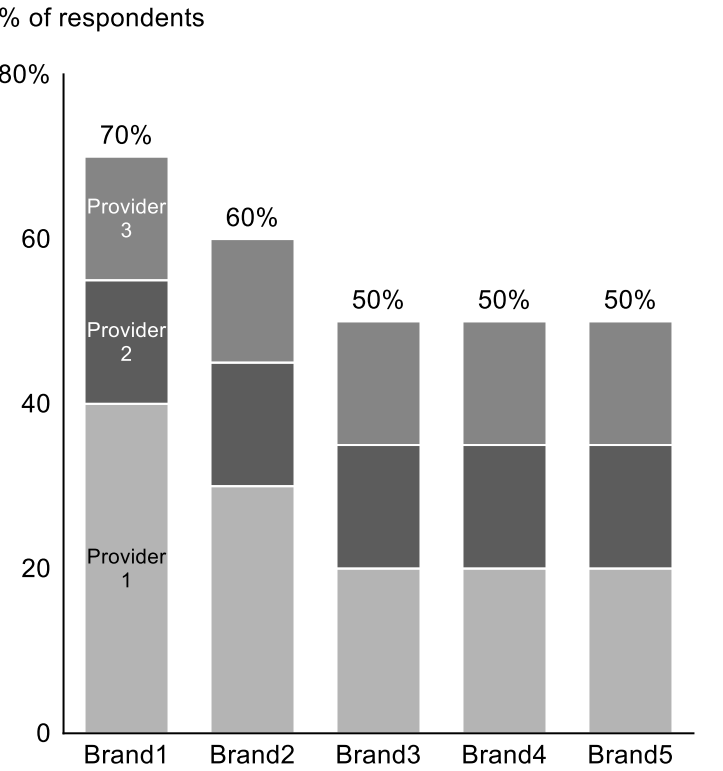
Avg. rating 2.5

Note:  
Source:

## / DIRECTIONAL / PRELIMINARY

### Y and Z often evaluated

**Q:** You have mentioned that you have **evaluated other providers** last time your contract with X expired. Please select the providers that were evaluated.



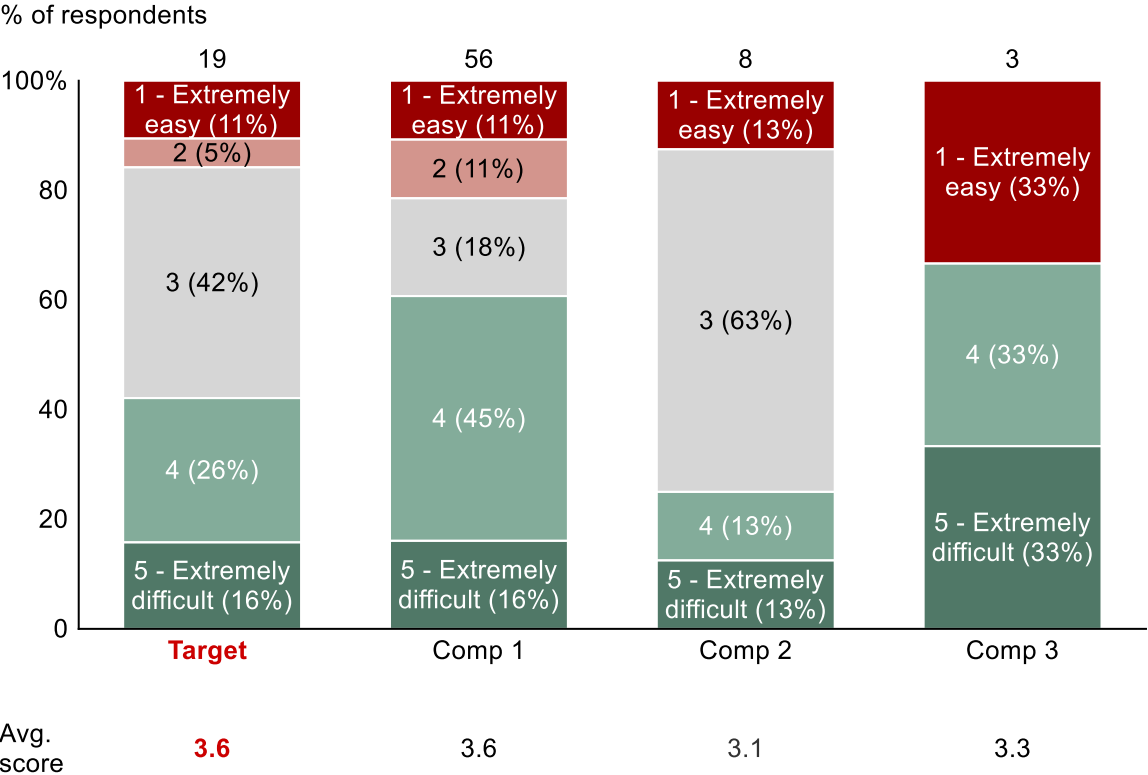
# X relatively easier switch from vs. competitors; x and y key barriers to switching across companies

## STICKINESS

/ PRELIMINARY

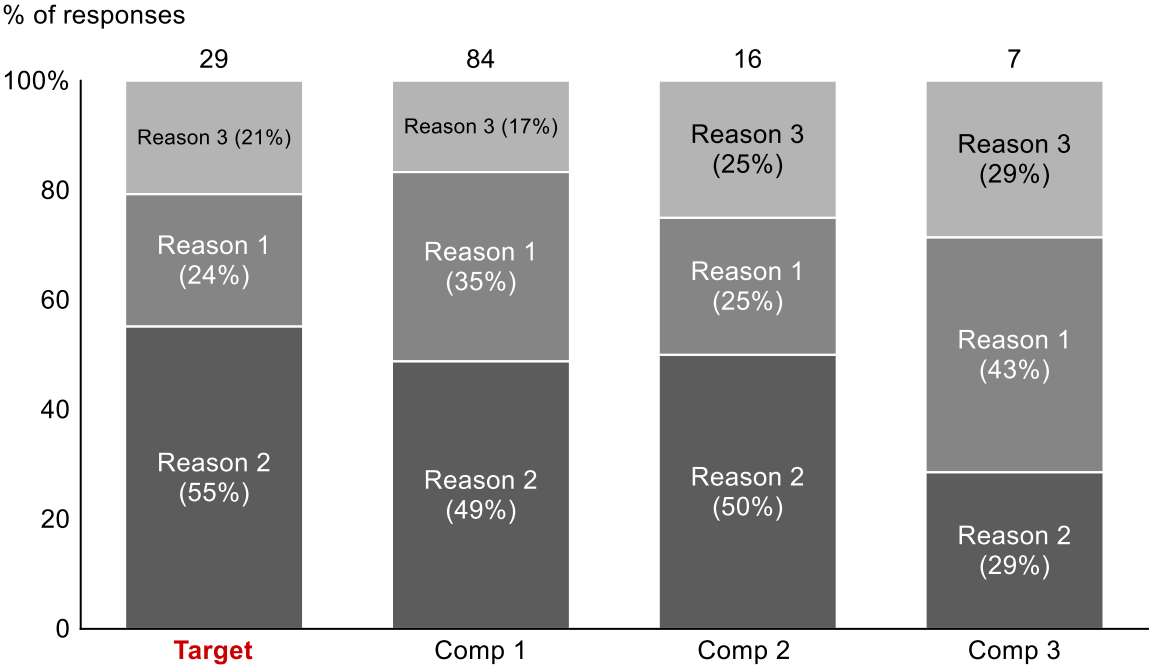
### Difficulty to switch

Q: How **difficult** would it be to **switch away** from <vendor> as a vendor?



### Switching difficulty reasons

Q: What makes **switching easy / difficult**?



Note: "Others" not shown; Respondents could select multiple reasons (RHS)  
Source:

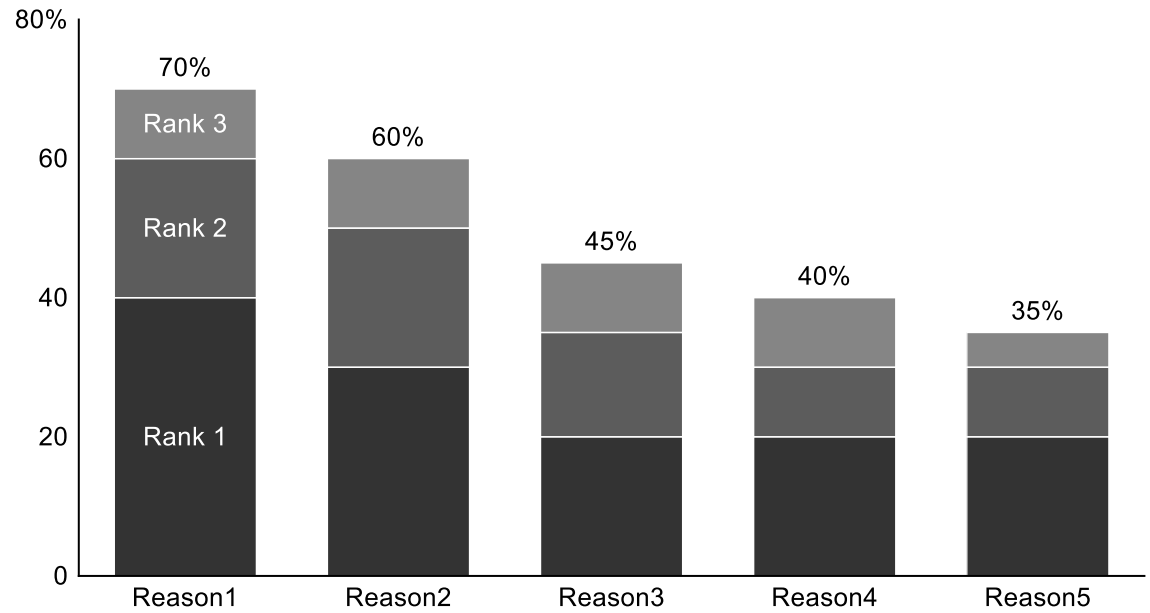
# x and y as the main reasons for switching away from X ; Customers switch to Y mainly

## PAST CHURN

### Past churn & reasons

**Q:** You mentioned you had **previously used X** but not within the **past X years**, what was the reason for switching away from that supplier?

% of respondents declaring score from 1 to 3 (N=X)

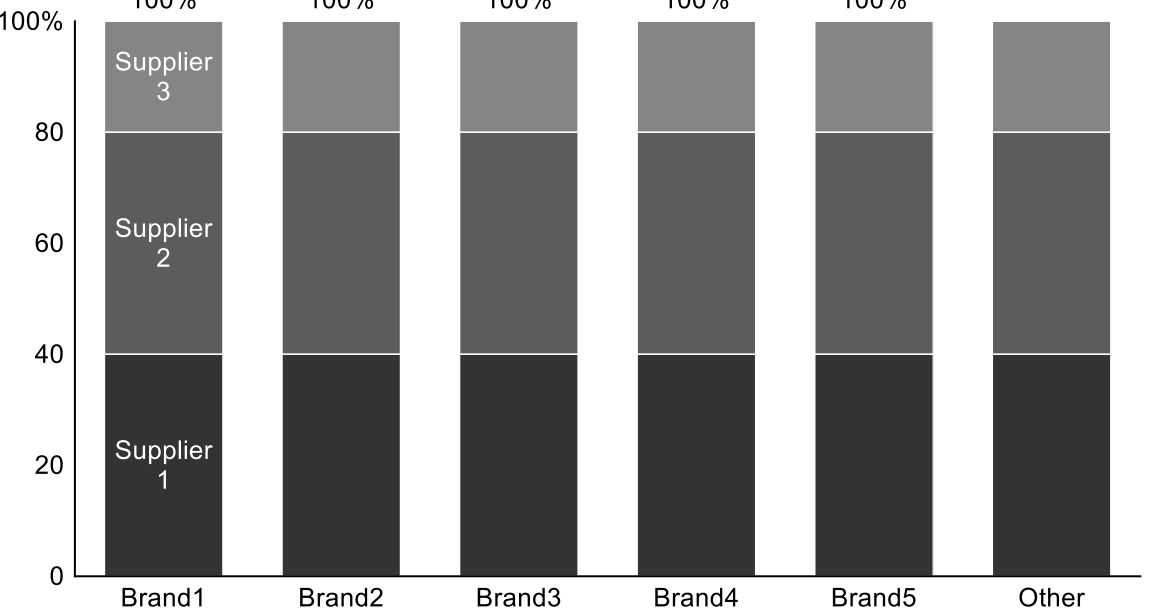


Note:  
Source:

### Replacement companies

**Q:** Which of your current suppliers replaced X when you stopped working with them?

Vendors that replaced X (# of respondents)



## A G E N D A

Demographics

---

NPS

---

KPC

---

Awareness and usage

---

Switching

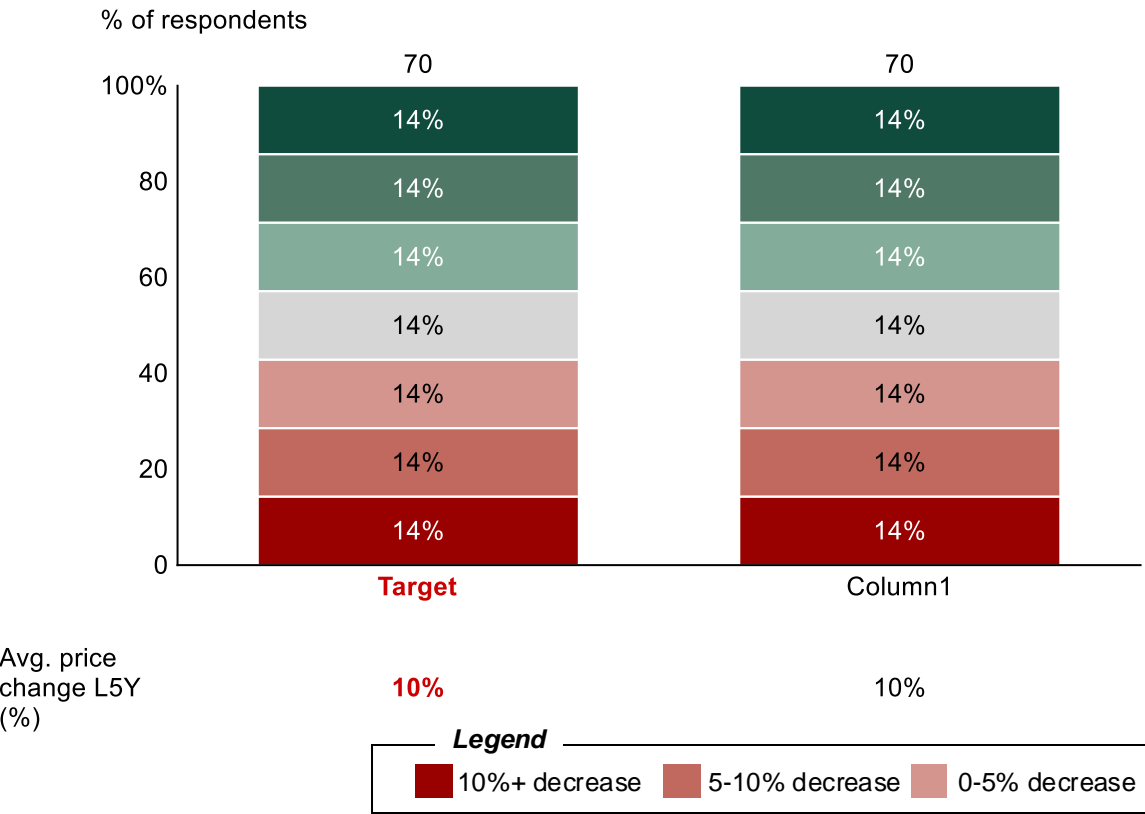
---

**Price, Spend and SOW**

# X with ~x% YoY price increase over past 5 years vs. ~y% for Y;

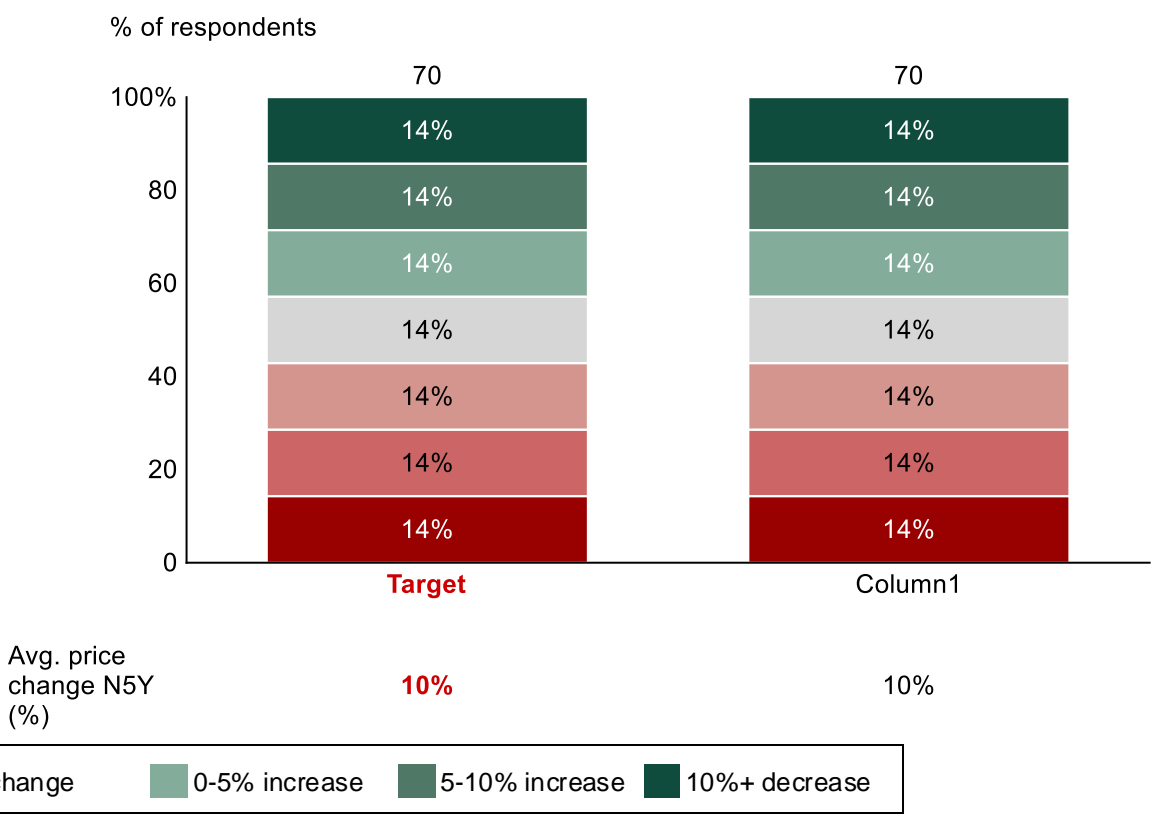
## Price trend over the last 5 years

Q: How has **price trended** (YoY % change) at <vendor> over the **last 5 years**?



## Price trend in the next 5 years

Q: How do you **expect price to trend** (YoY % change) at <vendor> over the **next 5 years**?

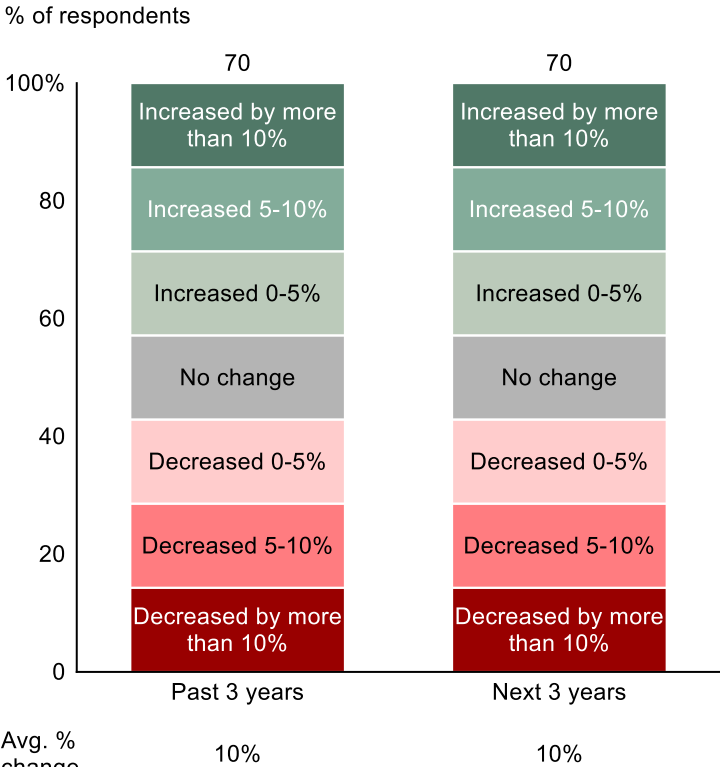


Note:  
Source:

~x% expect a spend increase on x; Average future spend expected to increase by x% YoY

Spend increase rate expected to increase in near future

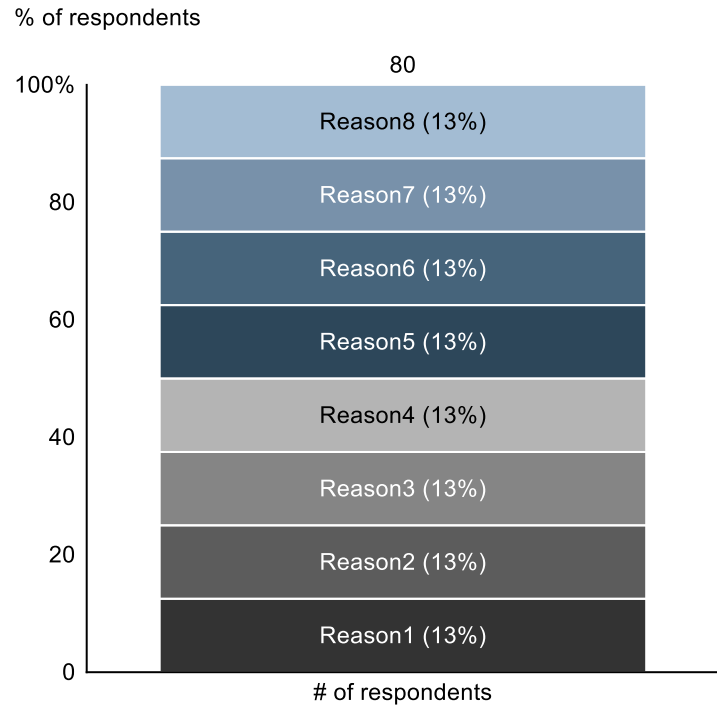
Q: How much do you believe your company's **total spend on x** has **changed/will change** over the following time frames?



Note:  
Source:

X as primary reason for change in spend

Q: Which of the following is the **primary reason** you expect a future change in spend?



Commentary

Blank – not updated

# Future Spend: ~x% of X customers have increased spend over past 3 years driven by y and z

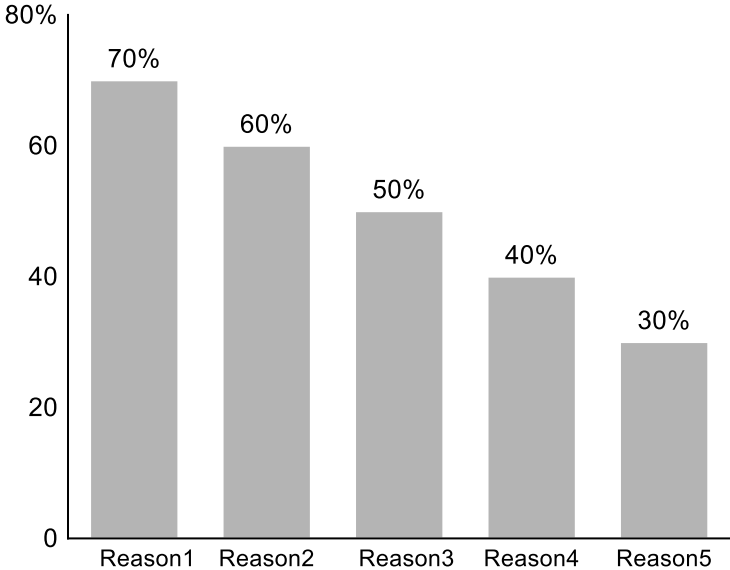
## FUTURE SPEND

/ PRELIMINARY

### Reasons for spend decrease

Q: What is the main reason that it has decreased? Please rank up to 3 reasons

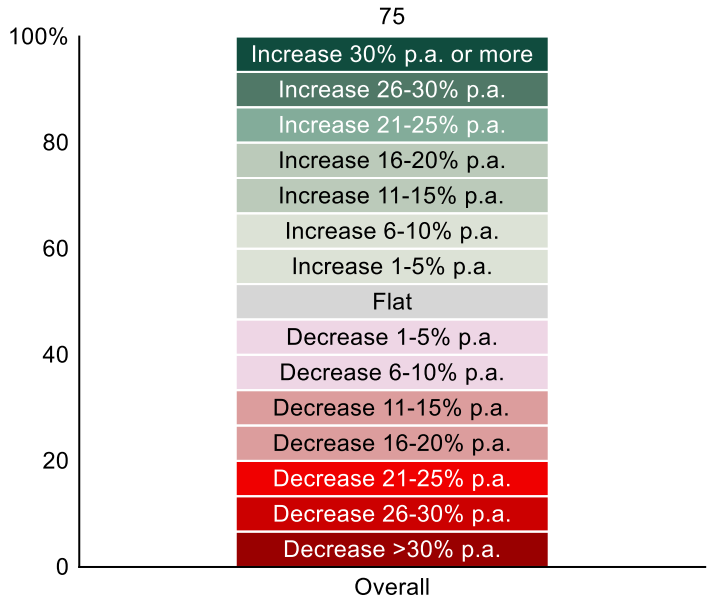
% of respondents (N=X)



### Change in spend

Q: You mentioned that you use X - how has **your spend changed with them over the past 3 years**? Please express your answer as an average percentage change per annum (p.a.)

% of respondents

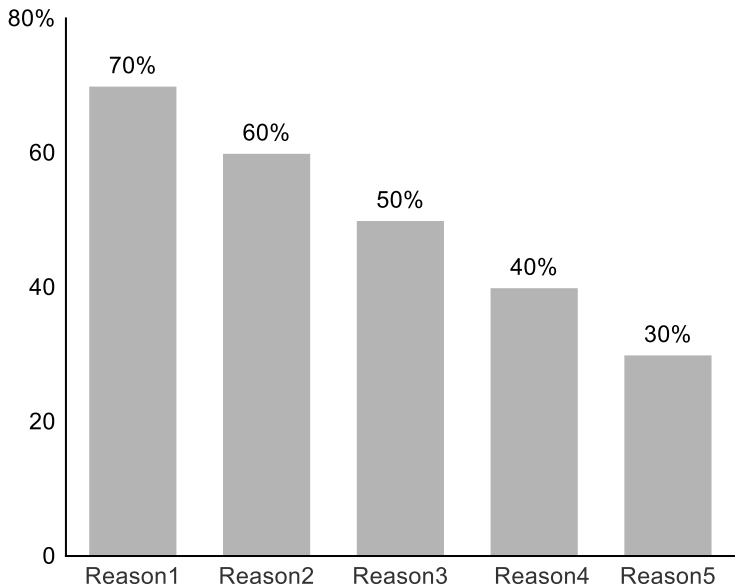


Average change 10.0%

### Reasons for spend increase

Q: What is the main reason that it has increased? Please rank up to 3 reasons.

% of respondents (N=X)



Note:  
Source:

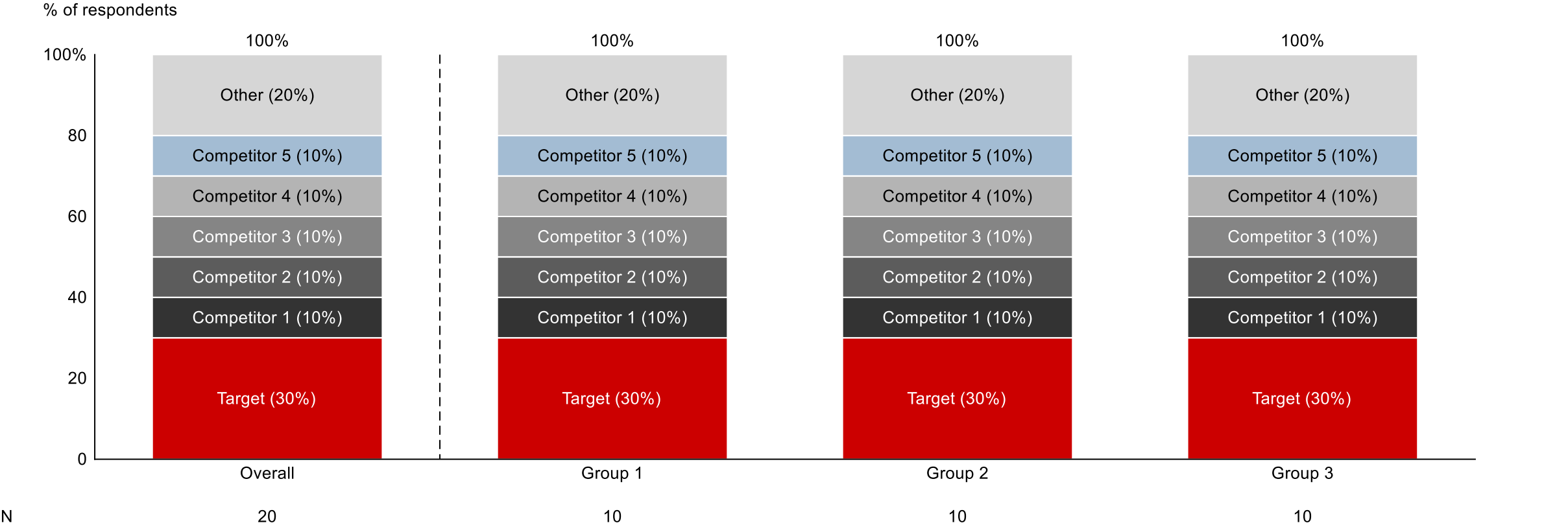


# Share of wallet: Top competitors

SHARE OF WALLET

/ PRELIMINARY

Q: Approximately what percentage of your total out-sourced Programmatic Advertising spend is spent on each of your top 5 managed services providers (implying Other accounts for the rest)?



Source:

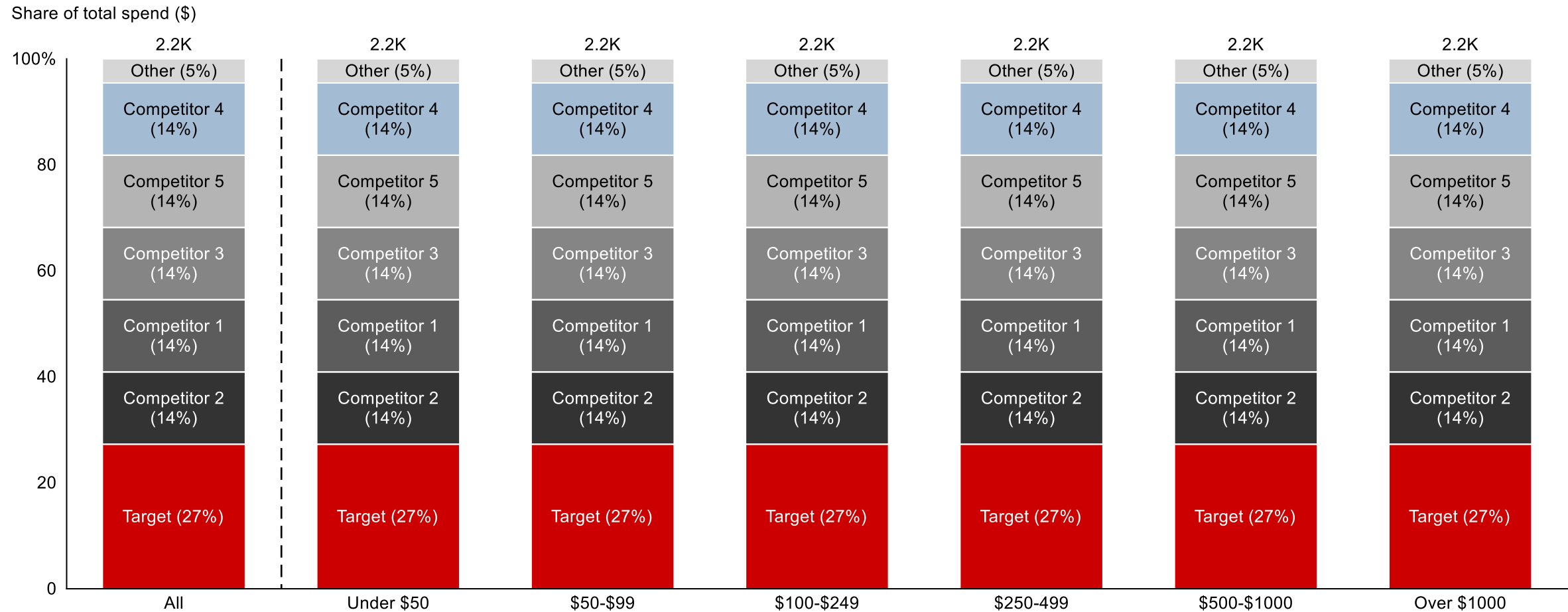
# Share of wallet: Weighted SOW

SHARE OF WALLET

BCN: weighted SOW by L12M spend (mid point)

CURRENT / PRELIMINARY

Q: Earlier you estimated you spent about <spend\_on\_self> over the last 12 months. Approximately, **how were those dollars split among the following brands?**  
Q: Over the last 12 months, **how much have you spent** on makeup for yourself?



Note: SOW calculated based on weighted average  
Source:

# Customer Overlap / Cross-brand purchase in L3M

## CUSTOMER OVERLAP

/ PURCHASED IN L3M / PRELIMINARY

### How to read this chart

1. Start from row heading. This is the type of brand that the respondent group purchased in L3M.
2. Go right... X% of people who purchased in L3M Brand A in the row heading, also purchased in L3M brand in the column heading

			Target brands						Plant-based (butter & spreads)			Dairy (butter & spreads)	
		Penetration (purchased in L3M)	Brand-1	Brand-2	Brand3	Brand4	Brand5	Brand6	Brand7	Brand8	Brand9	Brand10	Brand11
Target brands	Brand-1	32%	100%	44%	50%	45%	53%	59%	54%	57%	44%	36%	35%
	Brand-2	9%	13%	100%	14%	16%	15%	10%	14%	16%	20%	10%	14%
	Brand3	11%	18%	17%	100%	16%	13%	16%	23%	38%	15%	9%	15%
	Brand4	12%	17%	21%	17%	100%	28%	20%	16%	17%	23%	14%	15%
	Brand5	11%	18%	18%	13%	26%	100%	28%	16%	16%	31%	14%	16%
	Brand6	12%	22%	13%	16%	19%	30%	100%	17%	17%	28%	12%	15%
Plant-based (butter & spreads)	Brand7	20%	33%	30%	40%	27%	28%	28%	100%	44%	25%	21%	29%
	Brand8	15%	26%	25%	48%	20%	22%	21%	32%	100%	27%	16%	22%
	Brand9	9%	12%	18%	11%	16%	24%	20%	11%	16%	100%	8%	11%
Dairy (butter & spreads)	Brand10	28%	31%	32%	23%	34%	35%	28%	29%	32%	28%	100%	45%
	Brand11	20%	21%	30%	26%	24%	28%	24%	29%	30%	25%	31%	100%

Note: Top brands with highest level of awareness within each category shown

Source:

Degree of overlap: 0% 100%

# Customer Overlap / Repertoire analysis

## CUSTOMER OVERLAP

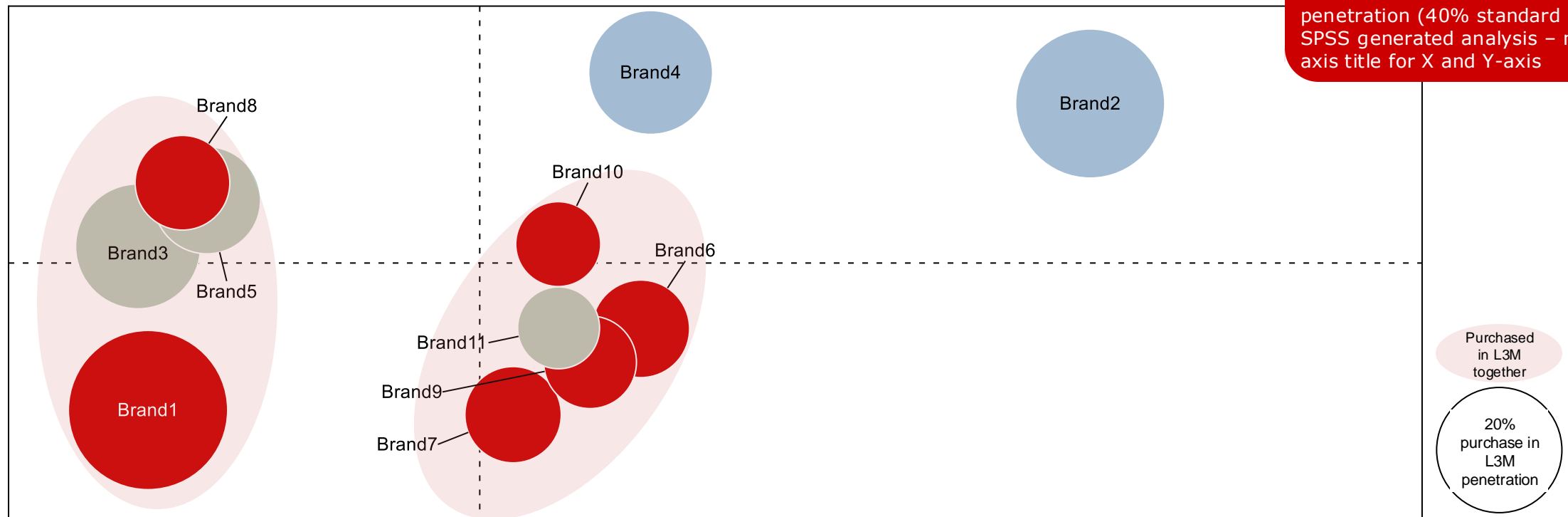
/ PURCHASED IN L3M / PRELIMINARY

Q13: How **familiar** are you with each of the following brands of butter and spreads?

Distance between bubbles indicates the level of overlap between the consumers  
(bubbles that are close together have been disproportionately bought in the L3M by the same persons)

BCN: How to read the slide?

Distance between bubbles indicates level of overlap between consumers  
Bubble size indicates consideration penetration (40% standard bubble)  
SPSS generated analysis – no particular axis title for X and Y-axis



### Legend

■ Target brands ■ Plant-based (butter & spreads) ■ Dairy (butter & spreads)

Note: Penetration in the bubbles on the chart above indicates buyers in L3M

Source:

