BCN PEG Mekko and think-cell Survey blanks

May 2025

BAIN & COMPANY

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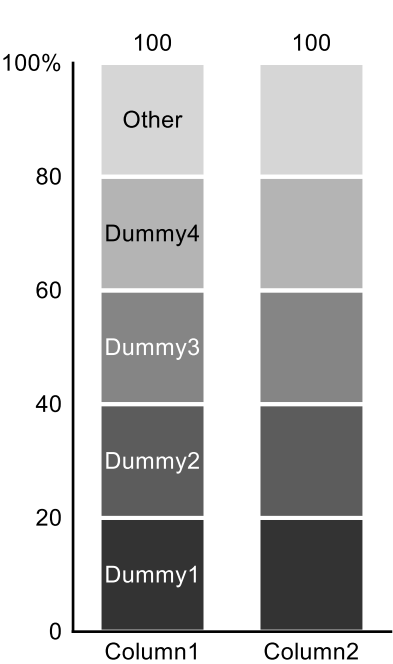
Country

Q: *In which country are you currently employed?*

Location by province (%)
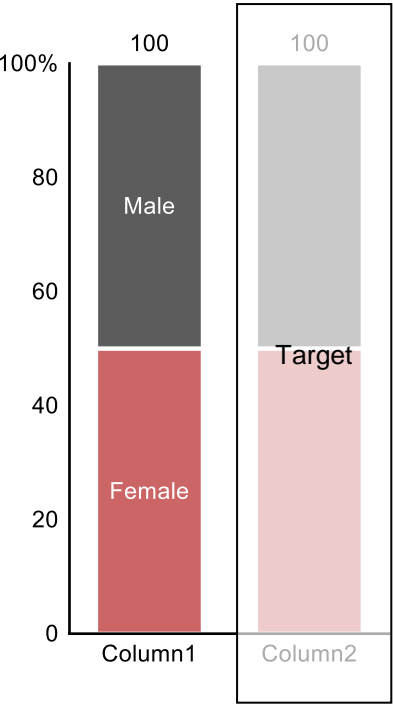

Gender

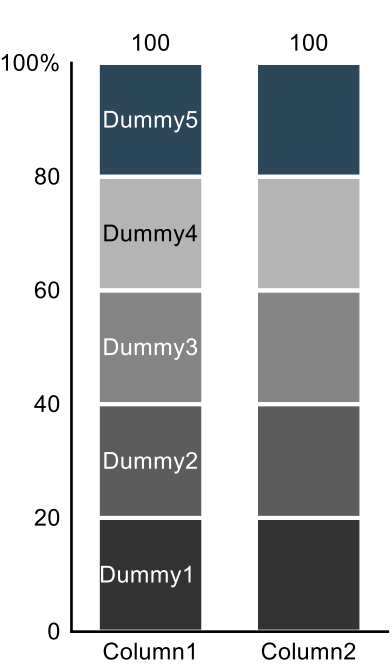**Q:** *What is your gender?*

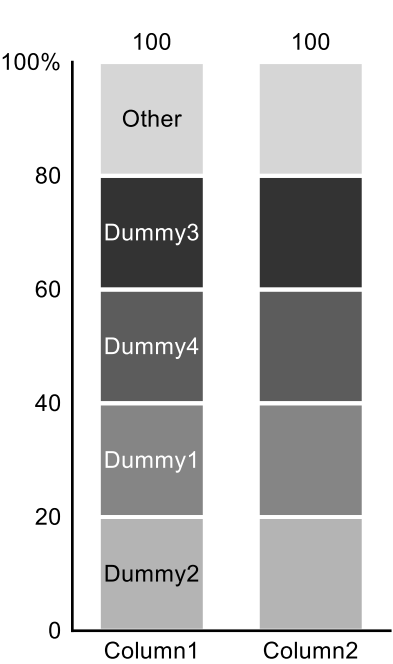Gender distribution (%)

Age

Q: *How old are you?*

Age distribution (%)

Industry

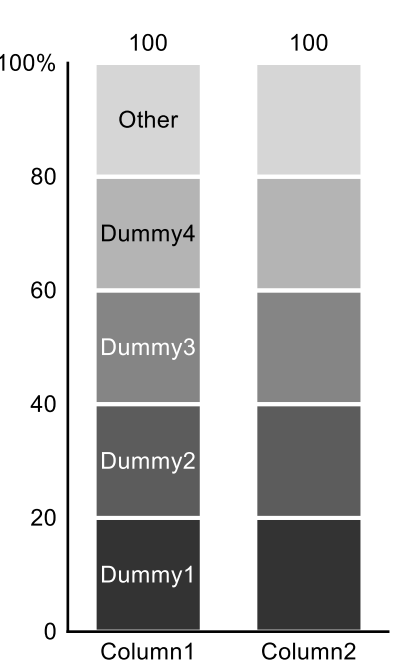**Q:** *Which of the following best describes the industry of your company?*

Industry distribution (%)

Role

Q: *Which of the following best describes your current role?*
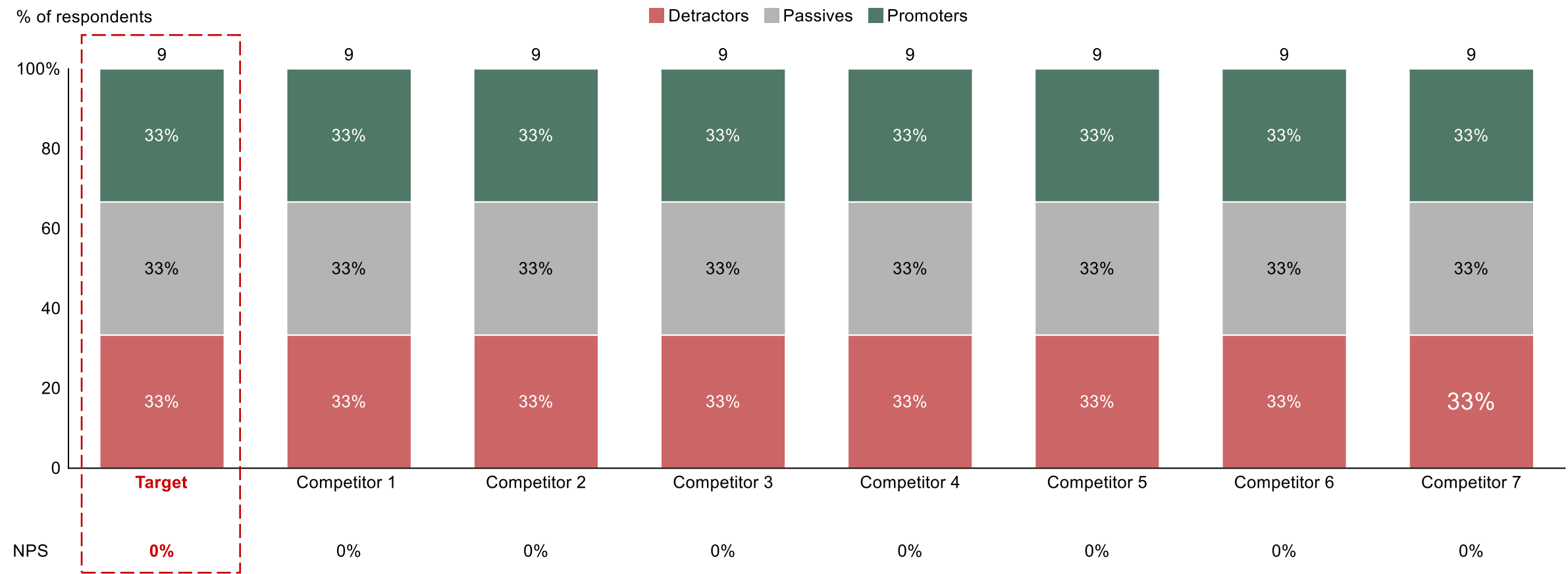
Role distribution (%)

Note:
Source:

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

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

% of respondents

■ Detractors ■ Passives ■ Promoters

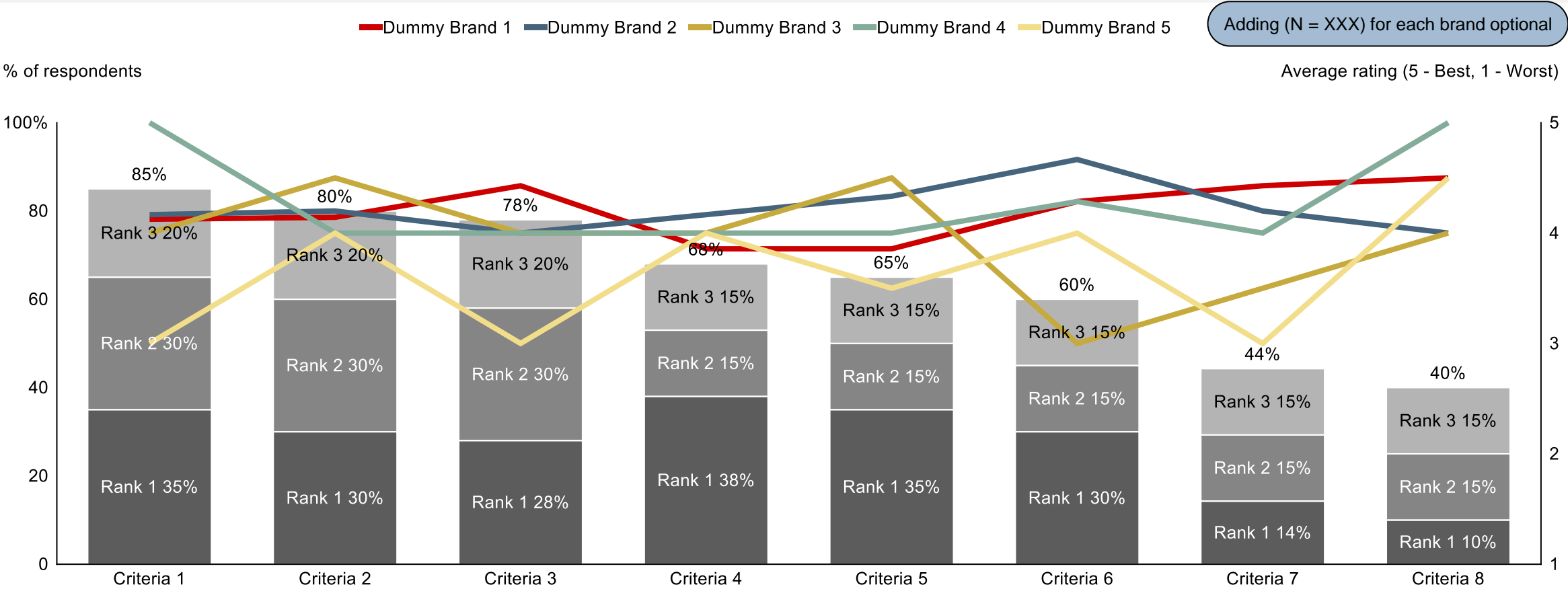|	Target	Competitor 1	Competitor 2	Competitor 3	Competitor 4	Competitor 5	Competitor 6	Competitor 7
(N)	9	9	9	9	9	9	9	9
Promoters	33%	33%	33%	33%	33%	33%	33%	33%
Passives	33%	33%	33%	33%	33%	33%	33%	33%
Detractors	33%	33%	33%	33%	33%	33%	33%	33%
NPS	0%	0%	0%	0%	0%	0%	0%	0%

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

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

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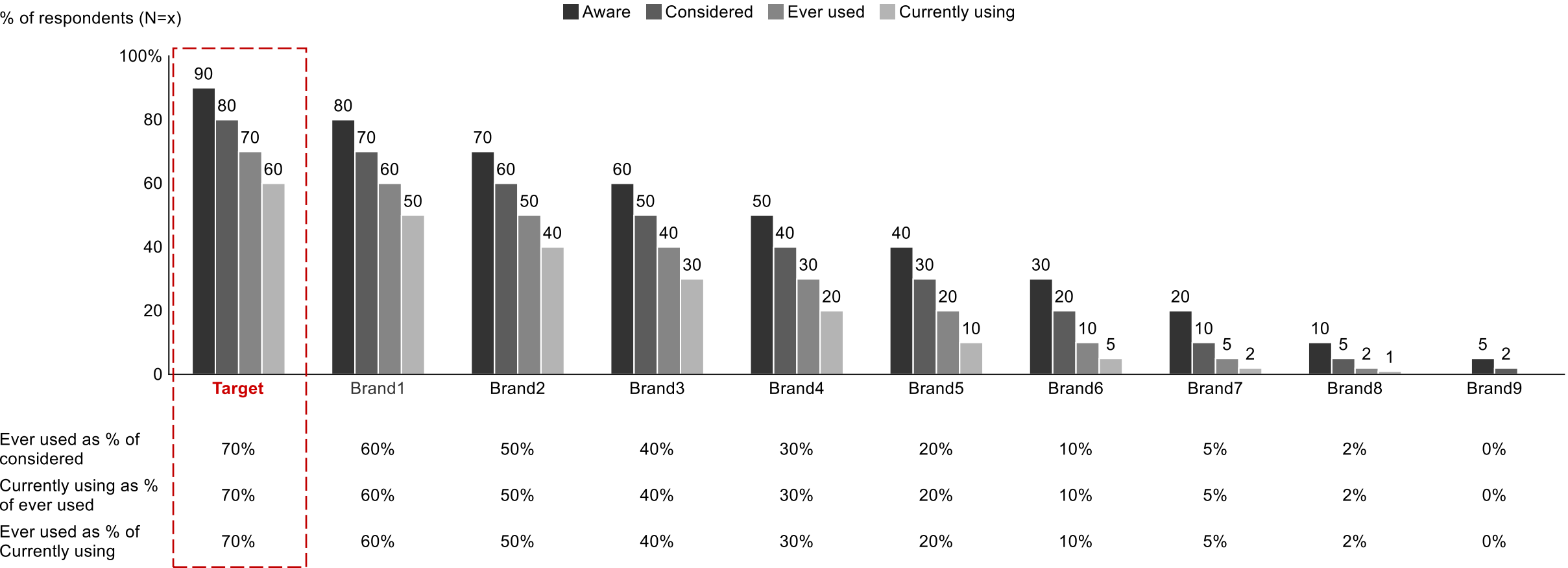*Q: For Dummy do you **rank** their **performance against the below criteria**?*

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

Adding (N = XXX) for each brand optional

% of respondents

Average rating (5 - Best, 1 - Worst)

Source:

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

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

% of respondents (N=x)

■ Aware ■ Considered ■ Ever used ■ Currently using

	Target	Brand1	Brand2	Brand3	Brand4	Brand5	Brand6	Brand7	Brand8	Brand9
Ever used as % of considered	70%	60%	50%	40%	30%	20%	10%	5%	2%	0%
Currently using as % of ever used	70%	60%	50%	40%	30%	20%	10%	5%	2%	0%
Ever used as % of Currently using	70%	60%	50%	40%	30%	20%	10%	5%	2%	0%

Note:
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
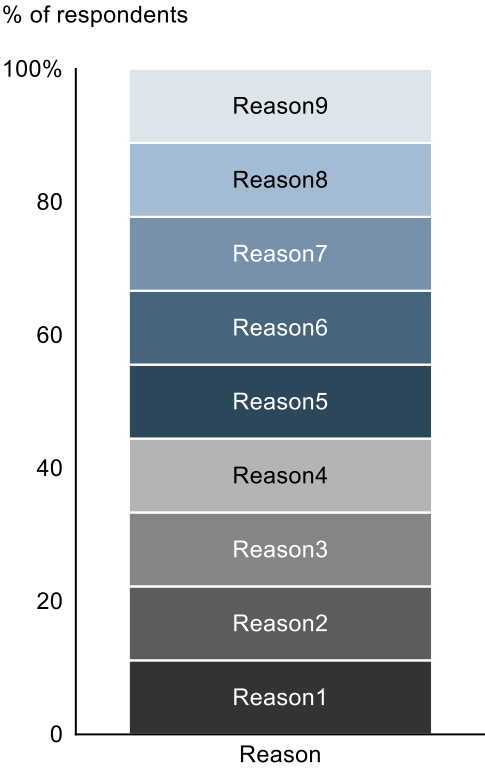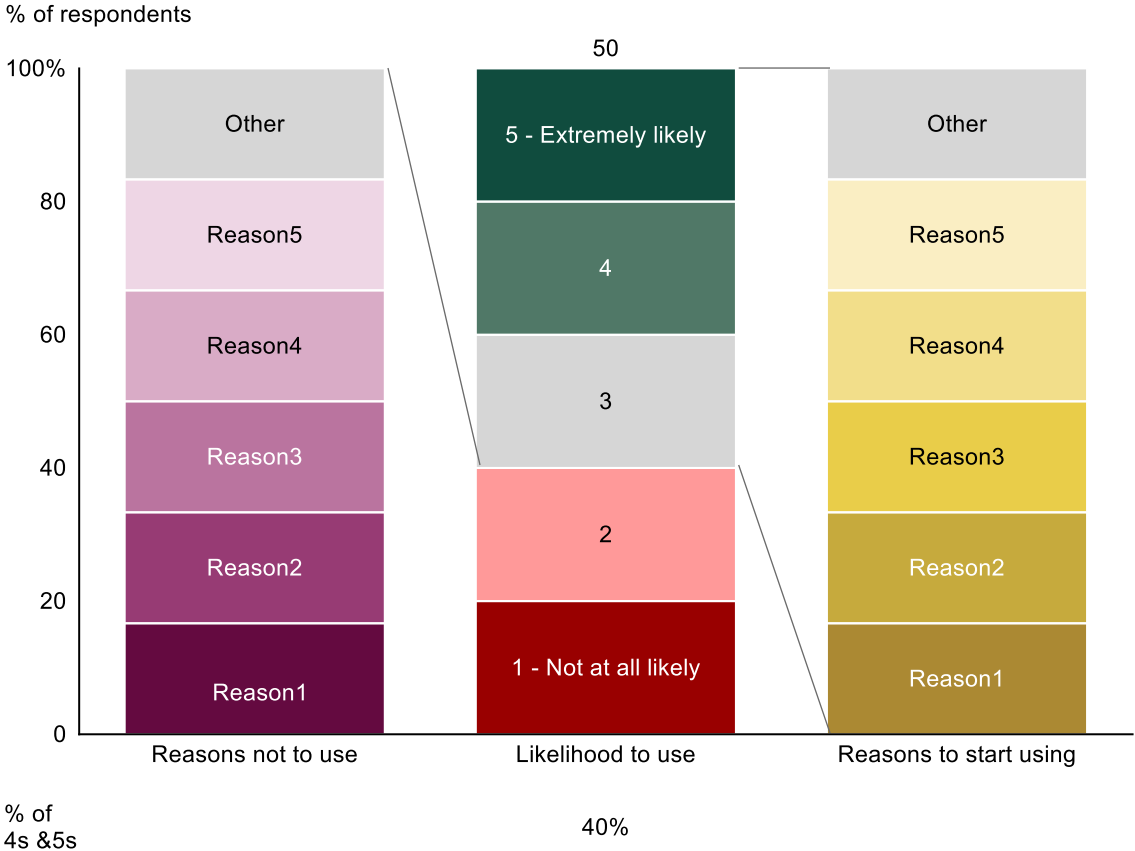
Reason for not using

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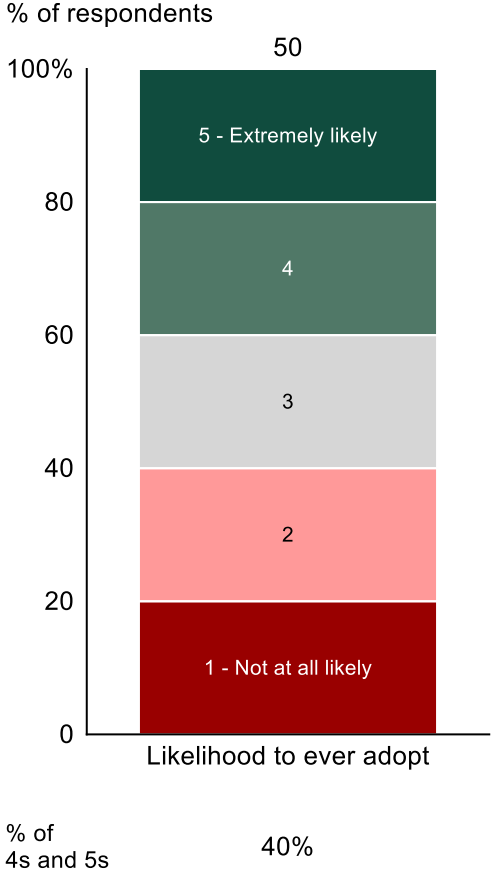
% of respondents

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?

% of respondents

% of 4s &5s — 40%

Likelihood to ever adopt

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

% of respondents

% of 4s and 5s — 40%

Note:
Source:

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

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

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.*
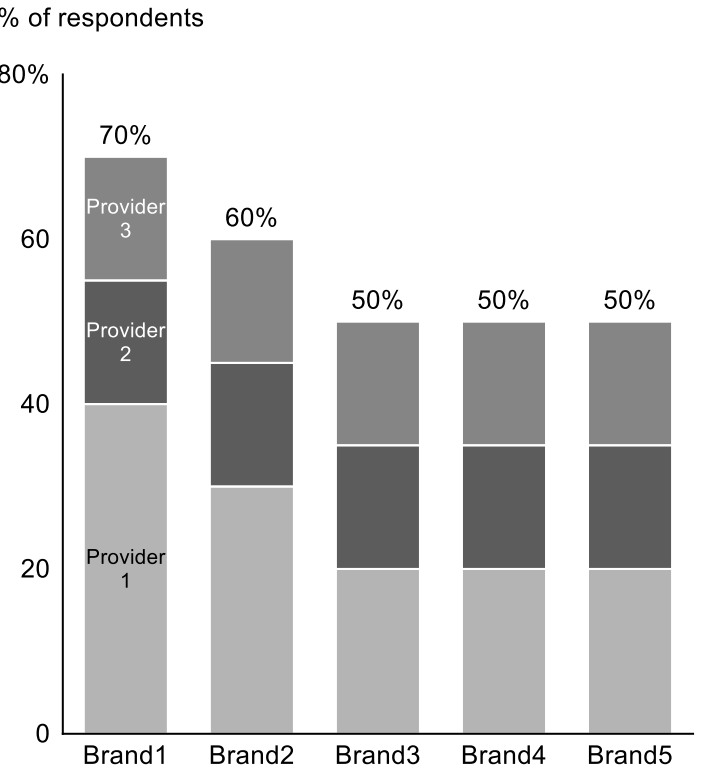
% of respondents (N=59)

Avg. rating   2.5

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.*
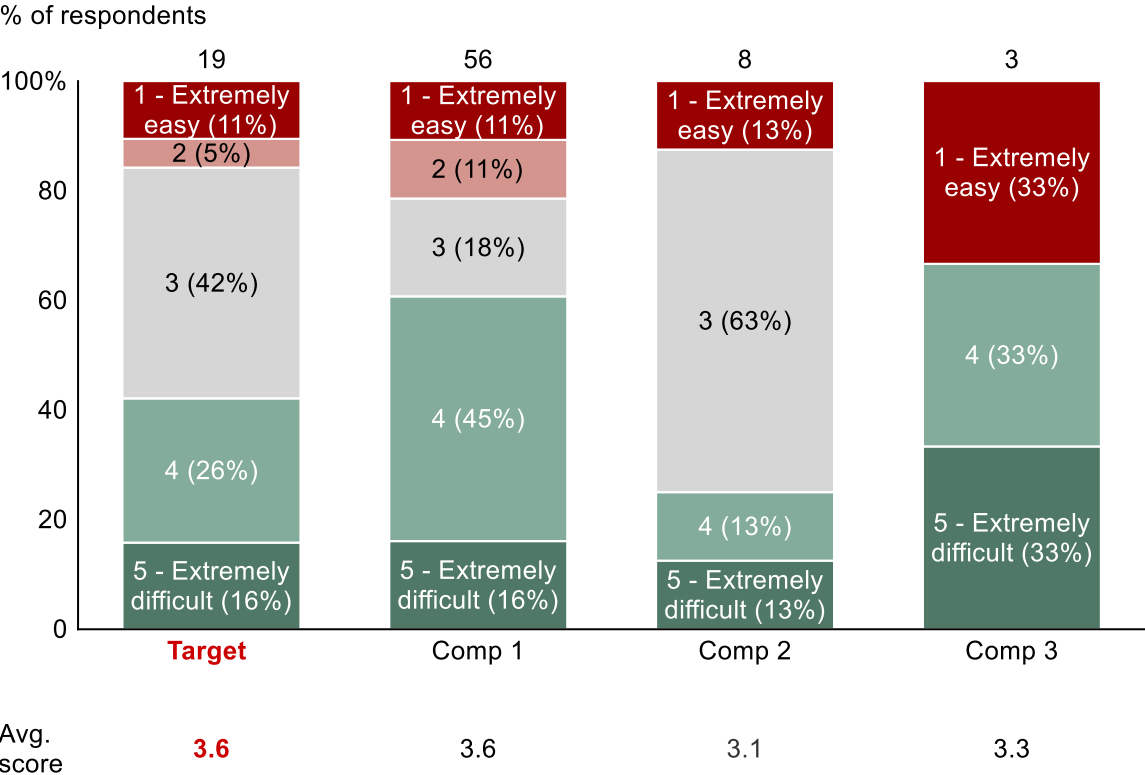
% of respondents

Note:
Source:

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

Difficulty to switch

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

% of respondents

Avg. score	**3.6**	3.6	3.1	3.3
	Target	Comp 1	Comp 2	Comp 3

Switching difficulty reasons

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

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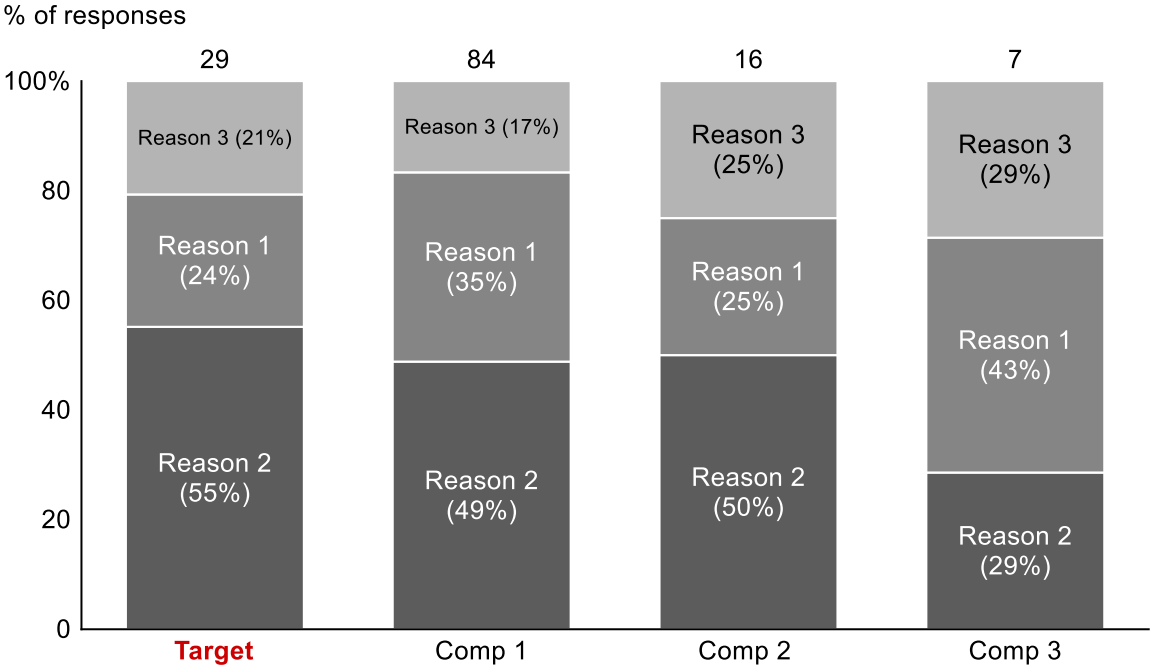
Note: "Others" not shown; Respondents could select multiple reasons (RHS)
Source:

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

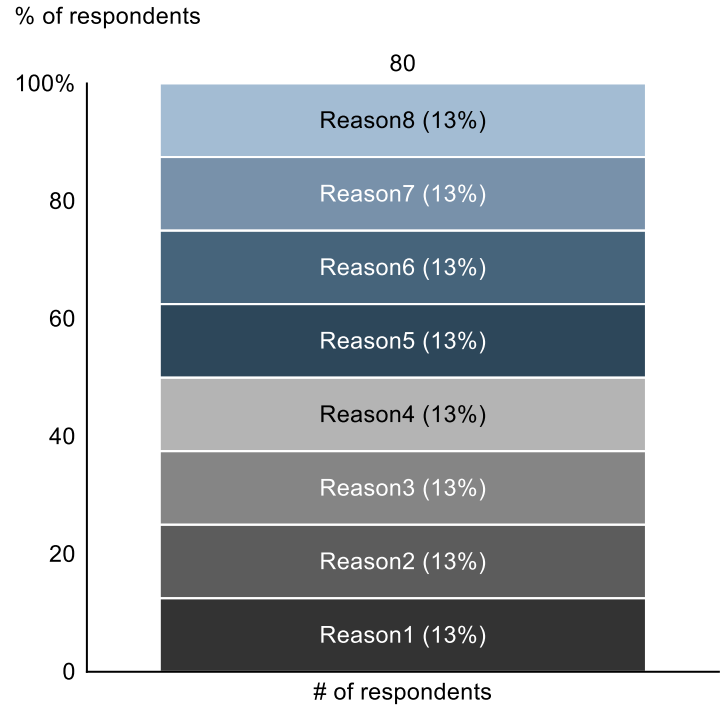## Spend increase rate expected to increase in near future

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

% of respondents

	Past 3 years	Next 3 years
Avg. % change	10%	10%
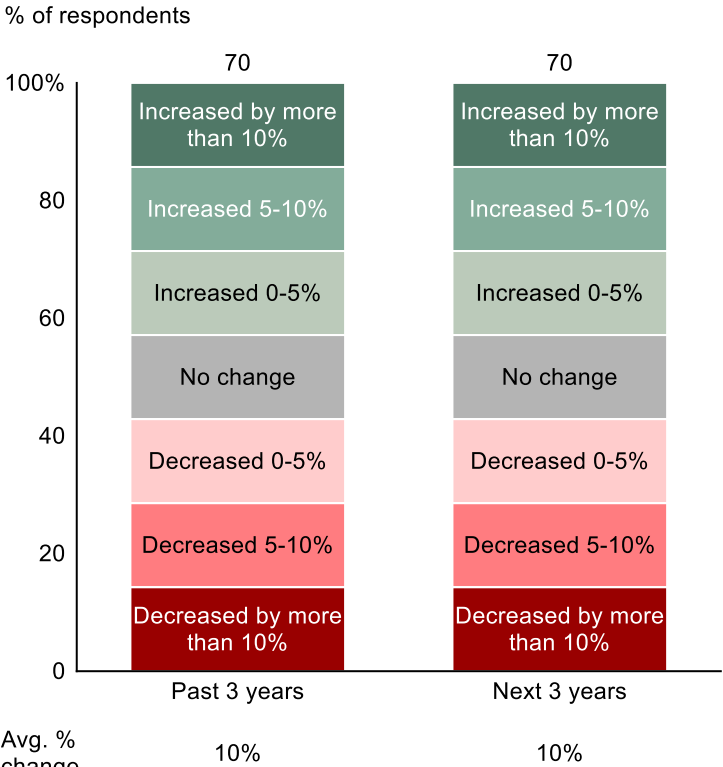
X as primary reason for change in spend

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

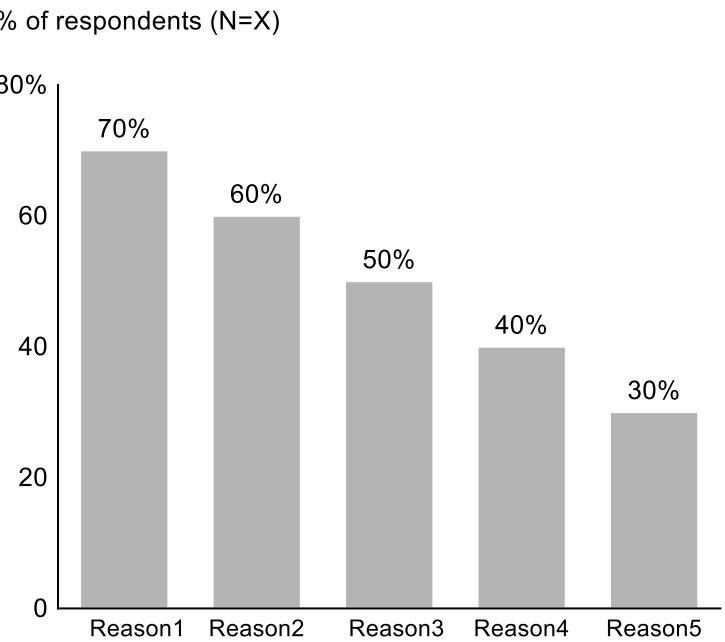% of respondents

Commentary

Blank – not updated

Note:
Source:

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

Reasons for spend decrease

Q: *What is the main reason that it has decreased? Please rank up to 3 reasons*
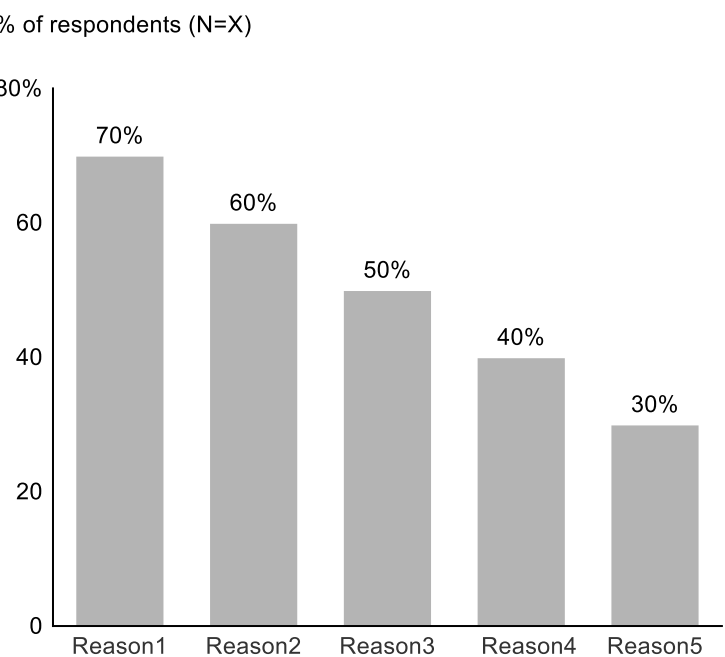
% of respondents (N=X)

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%
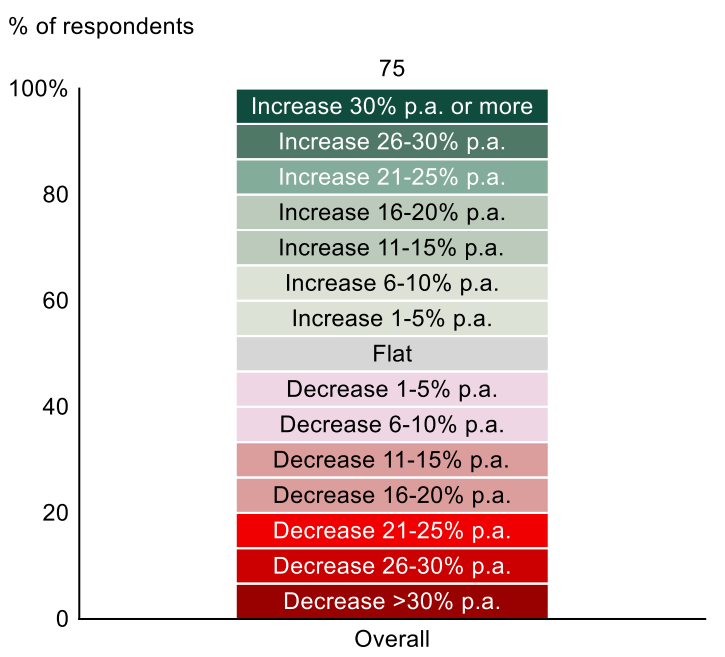
Reasons for spend increase

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

% of respondents (N=X)

Note:
Source:

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
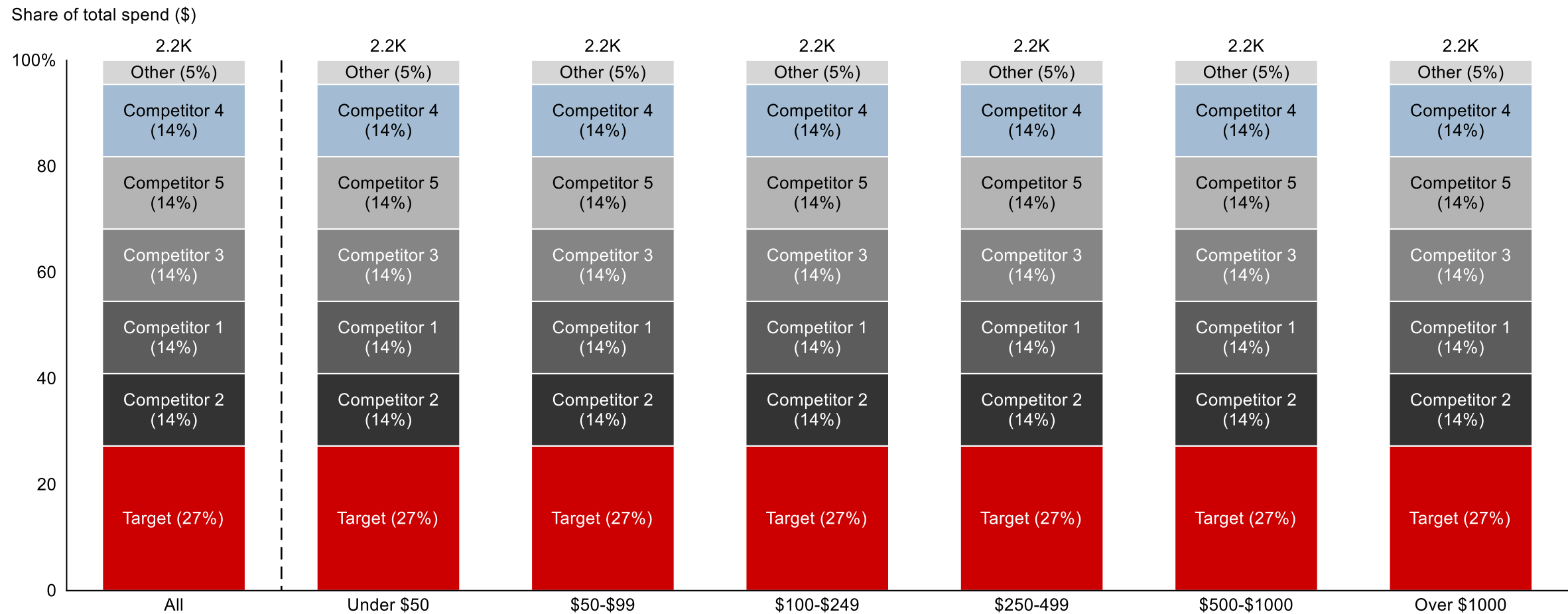
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Share of wallet: Weighted SOW

BCN: weighted SOW by L12M spend (mid point)

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

*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?*

Share of total spend ($)

|	All	Under $50	$50-$99	$100-$249	$250-499	$500-$1000	Over $1000
	2.2K	2.2K	2.2K	2.2K	2.2K	2.2K	2.2K
Other	5%	5%	5%	5%	5%	5%	5%
Competitor 4	14%	14%	14%	14%	14%	14%	14%
Competitor 5	14%	14%	14%	14%	14%	14%	14%
Competitor 3	14%	14%	14%	14%	14%	14%	14%
Competitor 1	14%	14%	14%	14%	14%	14%	14%
Competitor 2	14%	14%	14%	14%	14%	14%	14%
Target	27%	27%	27%	27%	27%	27%	27%

Note: SOW calculated based on weighted average
Source:

Survey Demographics

Country

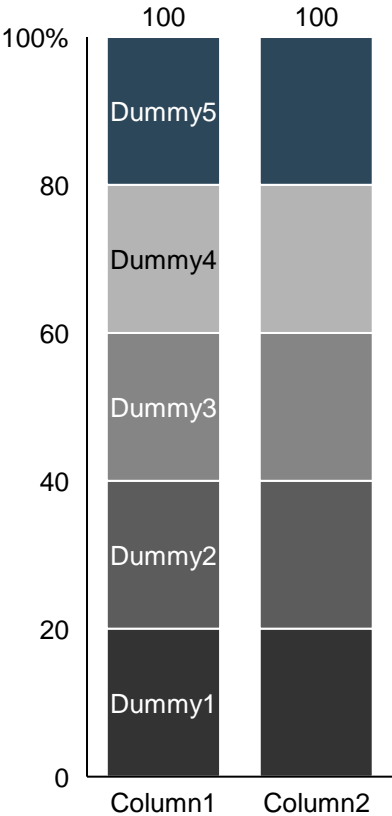Location by province (%)
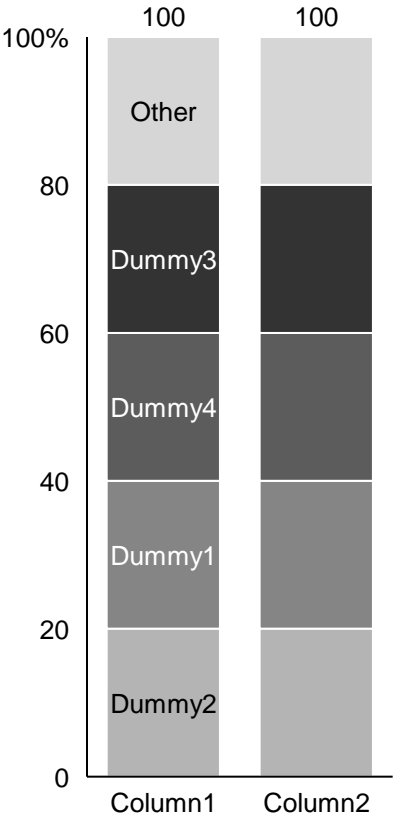

Gender

Gender distribution (%)

Target
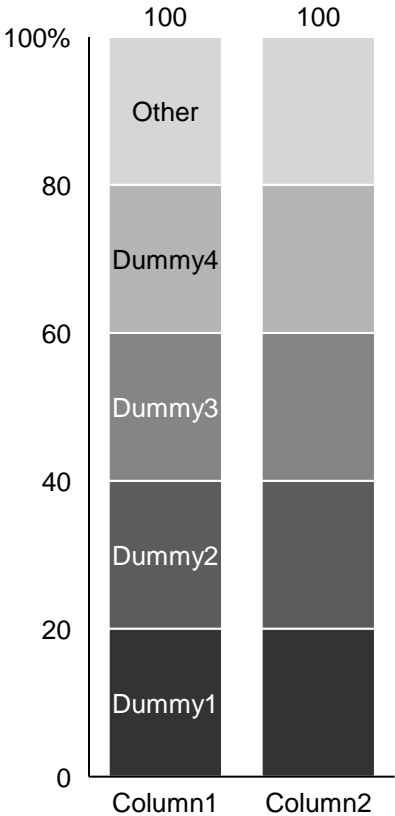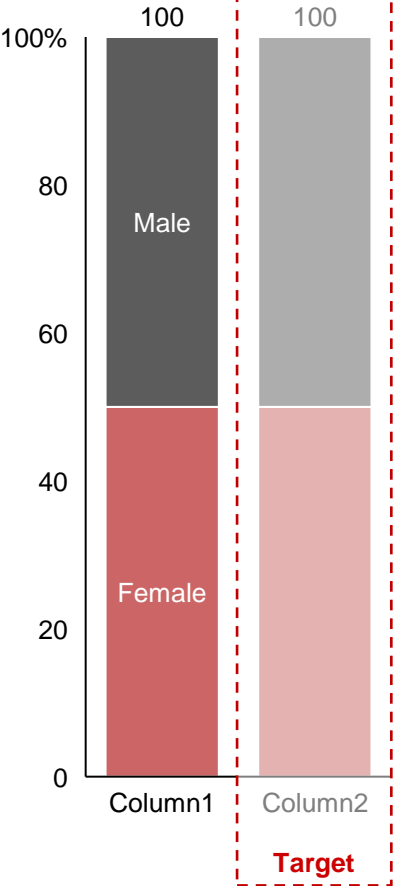
Age

Age distribution (%)

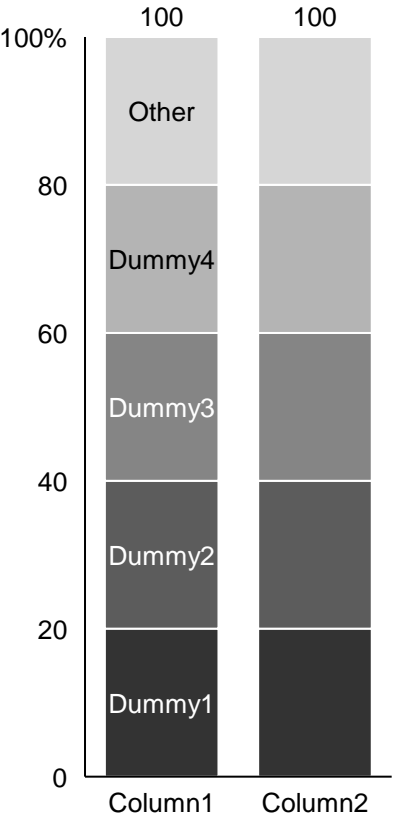## Industry

Industry distribution (%)

Role

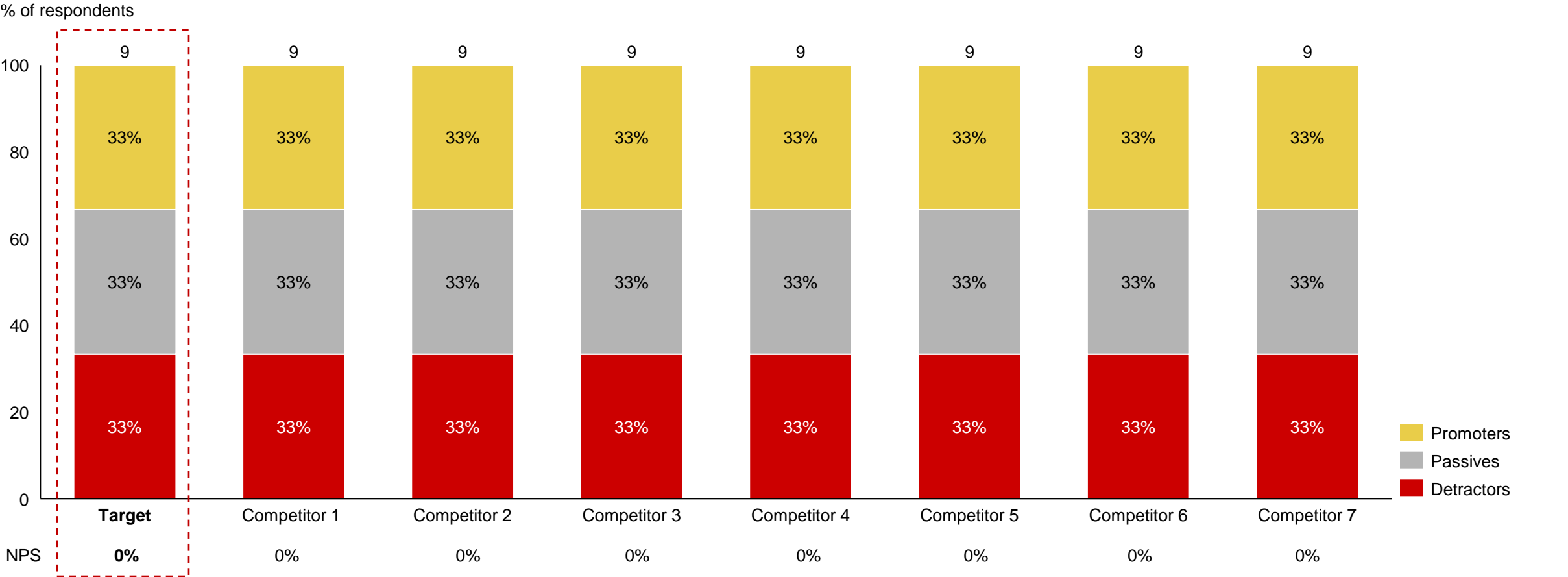Role distribution (%)

Note:
Source:

Customer advocacy (NPS)

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

% of respondents

	Target	Competitor 1	Competitor 2	Competitor 3	Competitor 4	Competitor 5	Competitor 6	Competitor 7
NPS	**0%**	0%	0%	0%	0%	0%	0%	0%

Legend:
- Promoters (yellow)
- Passives (grey)
- Detractors (red)
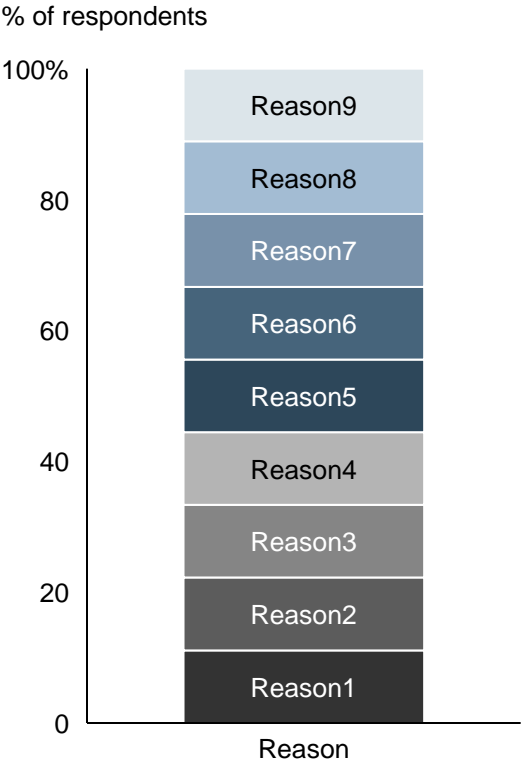
Note:
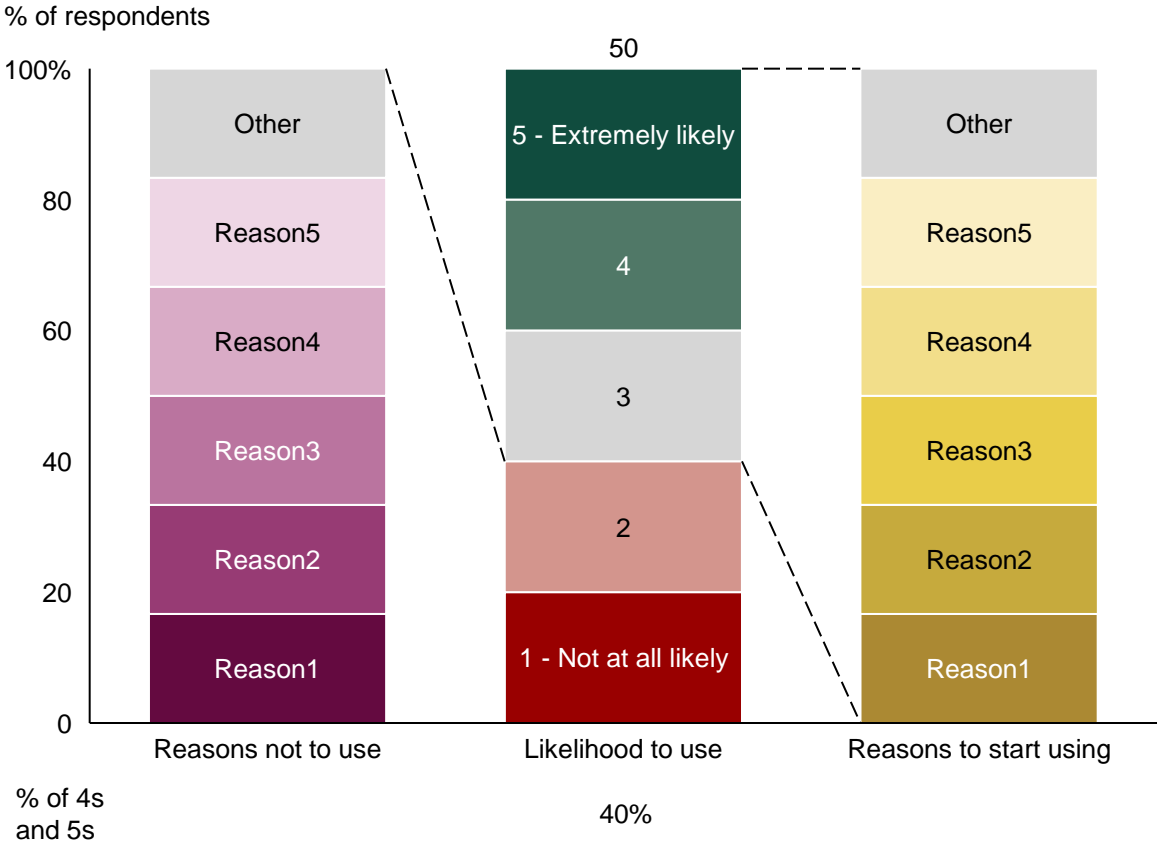Source:

Usage

Reason for not using

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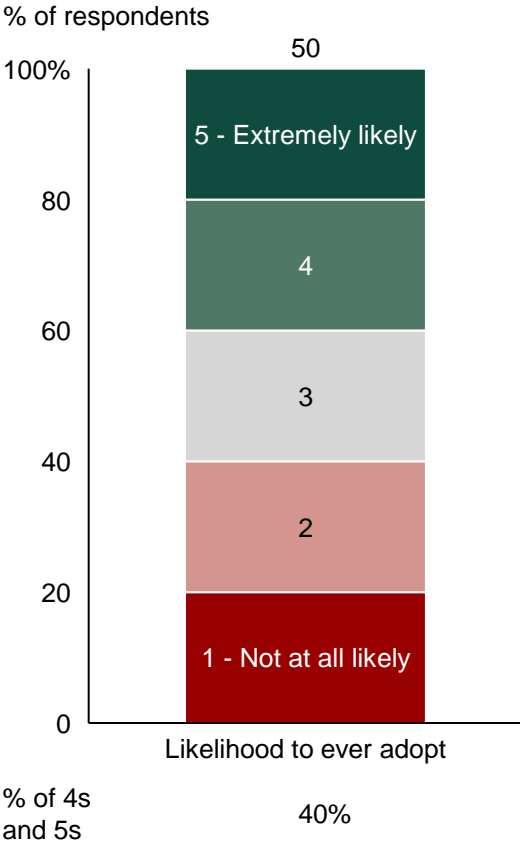
% of respondents

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?

% of respondents

% of 4s and 5s   40%

Likelihood to ever adopt

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

% of respondents

% of 4s and 5s   40%

Note:
Source:

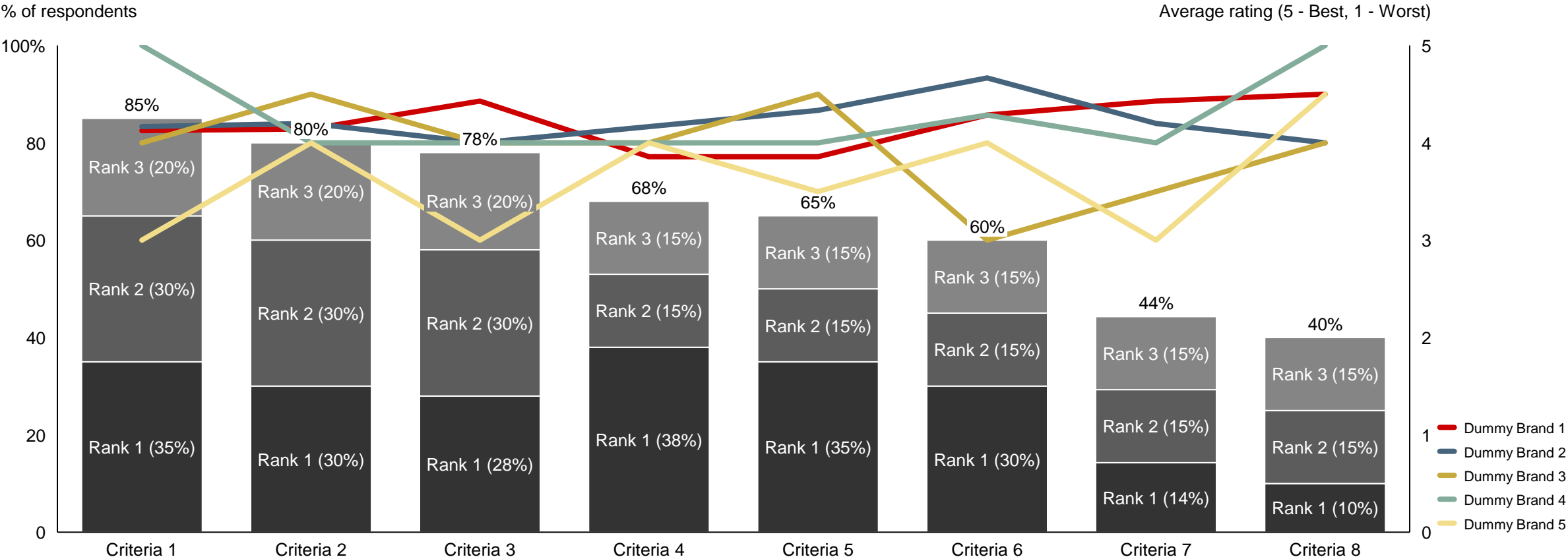# KPC: Criteria importance not indexed (% of respondents) - Ranked

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**?*

% of respondents

Average rating (5 - Best, 1 - Worst)

Criteria 1	85% — Rank 3 (20%), Rank 2 (30%), Rank 1 (35%)
Criteria 2	80% — Rank 3 (20%), Rank 2 (30%), Rank 1 (30%)
Criteria 3	78% — Rank 3 (20%), Rank 2 (30%), Rank 1 (28%)
Criteria 4	68% — Rank 3 (15%), Rank 2 (15%), Rank 1 (38%)
Criteria 5	65% — Rank 3 (15%), Rank 2 (15%), Rank 1 (35%)
Criteria 6	60% — Rank 3 (15%), Rank 2 (15%), Rank 1 (30%)
Criteria 7	44% — Rank 3 (15%), Rank 2 (15%), Rank 1 (14%)
Criteria 8	40% — Rank 3 (15%), Rank 2 (15%), Rank 1 (10%)

Legend:
- Dummy Brand 1
- Dummy Brand 2
- Dummy Brand 3
- Dummy Brand 4
- Dummy Brand 5

Source:

KPC: Segment level KPC

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	100%	100%	100%	100%	100%
Criteria 2	99%	99%	99%	99%	99%
Criteria 3	93%	93%	93%	93%	93%
Criteria 4	93%	93%	93%	93%	93%
Criteria 5	96%	96%	96%	96%	96%
Criteria 6	68%	68%	68%	68%	68%
Criteria 7	87%	87%	87%	87%	87%
Criteria 8	79%	79%	79%	79%	79%
Criteria 9	53%	53%	53%	53%	53%
Criteria 10	55%	55%	55%	55%	55%

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:

■ Category type 1   ■ Category type 2   ■ Category type 3   ☐ Other

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

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

% of respondents (N=x)

Legend:
- Aware
- Considered
- Ever used
- Currently using

	Target	Brand1	Brand2	Brand3	Brand4	Brand5	Brand6	Brand7	Brand8	Brand9
Ever used as % of considered	**70%**	60%	50%	40%	30%	20%	10%	5%	2%	0%
Currently using as % of ever used	**70%**	60%	50%	40%	30%	20%	10%	5%	2%	0%
Ever used as % of Currently using	**70%**	60%	50%	40%	30%	20%	10%	5%	2%	0%

Note:
Source: