How MR Can Get its Mojo Back in a Connected World
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Challenge and opportunity
The MR industry has an identity crisis

- Challenges with traditional research techniques
- New streams of data outside MR organizations
- Drive for greater actionability, agility
- Increasing pressure on budgets
The Result: MR organizations find it harder and harder to have a “seat at the table”
But each challenge is an opportunity

Opportunity to **use survey differently**

Opportunity to **help other groups curate their data effectively**

Opportunity to **integrate data streams** to create new stories

Opportunity to **demonstrate RORI** by helping to drive action
The Result: MR organizations are uniquely positioned to help businesses make sense of the data they have to understand customers and influence decisions.

- Opportunity to **use survey differently**
- Opportunity to **help other groups curate their data effectively**
- Opportunity to **integrate data streams** to create new stories
- Opportunity to **demonstrate RORI** by helping to drive action
### Key tactics

<table>
<thead>
<tr>
<th>Understand consumer dynamics in a more connected world</th>
<th>Think “both/and” between traditional survey and SM</th>
<th>Move from “data to measure” to “data to act”</th>
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<td>Leverage <strong>expertise</strong> in data curation to improve SML capabilities</td>
<td>Help businesses <strong>navigate an evolving P2P</strong></td>
<td></td>
</tr>
</tbody>
</table>
Understanding the connected consumer
Understanding consumers in a Connected World

The consumer is changing

Consistently connected
Inter-connected communities
Screen agnostic
Content trumps medium

End of media fragmentation
Data exchange economy
Embracing eCommerce
Consumer-centric disruption

Integration of data footprints
Targeting consumers with addressable media
Mobile, social enabling moment targeting
Network speeds allow content everywhere

Technology is enabling this

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Implications for MR organizations

We have to consider this **consumer context** in how we think about research we conduct.

We have to help the business take **appropriate action in a connected world** (workshops, activation sessions, etc.)
Example: Driving consistent success in media planning across markets and categories

**Issue**
A global company has moved more than 30% of media budget to digital. This spend was applied inconsistently across markets and categories.

**Approach**
Client and agency used TNS Connected Life reports and data to inform both overall investment levels across platforms and specific tactics.

**Insight**
Client identified universal truths around mobile growth, multi-screen viewing, cross-platform activities, differences between younger/older audience behaviors online, and device fragmentation across the day.

An internal guide was produced based on the local reports, informing of how to use each data point.

**Impact**
The client instituted working sessions with global and regional brand/category teams, local markets and media buying agencies to drive activation:

**Key actions taken:**
- Ensured media are present across key screens, focusing on highest “owned” screens
- Worked with media agencies to understand gray areas of online/offline overlap, match day-part plans to consumer device usage, optimize multi-screen plans
- Optimized digital creative to reflect category needs, tailoring content to different needs throughout the day
- Defined role of eCommerce within category and work to address purchase barriers
Bringing MR data expertise to SML
Data curation: the challenge of insights and SML organizations

**Insights organizations**

- Processes in place to ensure rigor around research design, data quality
- Emphasis on finding the “voice of the customer” in data
- Frameworks for analysis, diagnostics
- Ability to connect the learning to business outcomes

**Social Barrier**

**SML organizations**

- Have a wealth of consumer-generated content, but it’s hidden
- Often reside in Marketing, PR or specialist SM functions
- Tracking marketing campaigns, buzz
- Often lack resources, expertise to curate the data effectively to get to consumer insight
Client and Agency Insights organizations can help businesses bring true customer insight from SM

Cleaning data of marketing content, bots, crowd-sourced marketing, extraneous noise to get to customer-generated content

Developing business-relevant taxonomies for categories, brands, themes, sentiment

Analyzing the data with a market research lens
Example: Retailer understanding

Client provided their internal data from their SML platform

Rigorous, iterative curation identified this funnel...

Initial Data
32M

Usable content after cleaning:
15M

Content with 1+ theme:
9M

Only 28% of the original SML was customer-generated “signal” relevant to their business question!
Example: Retailer understanding

Having a clean, well-curated set of customer-generated content allows us to bring both qualitative and quantitative insights out of the data.

Quantitative from data processing of the curated social data for analysis

Qualitative from drilling down to individual posts that bring the data to life

Tweet: “Funny video of employee at Retailer X” youtube.com…
4
Integrating survey and social media
Survey and social data bring out the best in each other

Social media enhance surveys

- Authentic voice of the consumer
- Unsolicited observations
- Rich in detail
- Reveal what is behind survey information

Surveys enhance social media

- Provide structure
- Evaluate impact of topics on customer relationships
- Reliable link to demographics
- Fill data holes in social media
Example: Social CX measurement
British Airways

01
We investigate social media strictly from a customer experience perspective

02
We make sense of social data through structuring what is unstructured information

03
We link survey and social data so that they guide and inspire one another

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We can extract customer experience-relevant content from thousands of online conversations.

Identify company-relevant content from social media

Condense into a smaller volume of customer experience content

1. General social content
2. Customer experience-relevant
3. Service touchpoints
And apply structure to unstructured data with proven concepts from customer research

Customer journeys and touchpoints

Customer segments and target groups

Competitive context

Customer service processes
Social customer journey
Understanding social buzz and its causes

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### Buzz-impact matrix
Setting clear priorities for improvement

**Examine**
How can positive buzz be used to influence customer loyalty? Monitor negative buzz to avoid impact on customer loyalty.

**Observe**
No immediate areas of action. Consider where to increase positive buzz if strategically relevant and monitor aspects which are rated negatively.

<table>
<thead>
<tr>
<th>Social buzz</th>
<th>Impact on relationship</th>
</tr>
</thead>
<tbody>
<tr>
<td>Low</td>
<td>4</td>
</tr>
<tr>
<td>Low</td>
<td>3</td>
</tr>
<tr>
<td>High</td>
<td>1</td>
</tr>
<tr>
<td>Low</td>
<td>2</td>
</tr>
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**Top priority for improvement**
Good performance should be leveraged on social media; negative performance indicates the need to improve processes and manage relationships.

**Second priority for improvement**
Improvements for negative evaluations of touchpoints and response via social media. Examine how to increase buzz on good performance.

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How can positive buzz be used to influence customer loyalty? Monitor negative buzz to avoid impact on customer loyalty.

No immediate areas of action. Consider where to increase positive buzz if strategically relevant and monitor aspects which are rated negatively.

Good performance should be leveraged on social media; negative performance indicates the need to improve processes and manage relationships.

Improvements for negative evaluations of touchpoints and response via social media. Examine how to increase buzz on good performance.
Buzz-impact matrix
Setting clear priorities for improvement

A. Search for information
B. Booking
C. Check-in
D. Ground staff
E. Baggage drop-off
F. Passport control
G. At the gate
H. Boarding
I. On the plane
J. Food & drinks
K. Crew
L. Entertainment on board
M. Baggage reclaim
N. Pricing
P. Lounge
Q. Lost luggage
R. Complaints
S. Customer Service
U. BA Website
V. Cancelling or rebooking a flight

O1. Punctuality
O2. Handling of delays

Low Impact on relationship

Social buzz

High

Low

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Social deep-dive
Refining actions to improve performance

I would just like to say a **HUGE thank you to the BA crew** that operated the flight from EDI to LGW today at 13.35hrs. My aunt left a £60 bottle of perfume in the overhead locker by mistake and the crew handed it in to lost property!

Great service from **@British Airways** **exceptional service** from a particular crew, always **smiling**. To fly to serve.

Thank you to the **@British_Airways** crew BA195 yesterday. Nice to **be well looked after** by **happy** people. **#britishairways** awesome **#toflytoserve**

Dear **@British_Airways** another perfect flight Martin, Denise, Pillar & Trevor were outstanding **very caring and considerate** crew **#ToFlyToServe**

**@British_Airways** Not too much longer, and the cabin crew made up for it with some **excellent service**. Truly 'to fly, to serve'.

Source: Instagram
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5 Helping business navigate the path to purchase
As markets mature digitally, the shopper journey displays considerable complexity

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In order to evaluate actual influence, the impact on brand conversion needs to be determined

- Reach is not sufficient
- Claimed influence can mislead, modelled influence is better
- But modelling must take into account the starting brand equity, integrating brand, shopper, and connected consumer understanding
- Conversion-led modelling identifies the touchpoints which are most influential
Modelling those touchpoints that ‘punch above their weight’ tells us where to focus

Most impactful touchpoints – hair care

<table>
<thead>
<tr>
<th>Reach%</th>
<th>WOM</th>
<th>Saw pack for info</th>
<th>Picked up, compared products</th>
<th>Samples</th>
<th>Check deals at store</th>
<th>Spoke to another shopper</th>
<th>Saw advertising on TV</th>
<th>Checked prices</th>
<th>Online blogs</th>
<th>Product display</th>
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Modelling those touchpoints that ‘punch above their weight’ tells us where to focus

**Most impactful touchpoints – hair care**

![Bar chart showing reach% and share of impact for various touchpoints in hair care.]

- WOM: 40
- Looked at packs for info: 24
- Saw pack promotions: 15
- Picked up, compared products: 22
- Samples: 31
- Check deals at store: 12
- Spoke to another shopper: 6
- Saw advertising on TV: 14
- Checked prices: 11
- Online blogs: 9
- Product display: 13
- Spoke to store staff: 14
- Deals at end of the aisle: 8
- Had a coupon: 6

- Packaging highlighted in red.

**Share of impact**

- In-store
- Pre-store

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And find out which touchpoints are working for the brand

Most impactful touchpoints for brand – hair care

Share of impact

Tv adverts | Price & promotion POS | Packaging | Online research | WOM | Staff | Expert advice | Sampling | Online adverts

In-store | Pre-store

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6
Moving from measurement to action
Moving beyond measurement to action

Research data have always been able to help **inform** business decisions

Now, data can be used to directly **drive** business decisions and actions

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Turn insight into action through a digital ad-targeting capability: Digital Segment Targeting

ConversionModel identifies consumers willing to spend more with your brand:

- Buy more
- Buy the same
- Beyond reach

Digital Segment Targeting

Your Growth Segments can now be reached online

Your Brand Growth Targets within DST include two audiences:

Core Audience
People who buy your brand and are willing to buy more of it

Conquest Audience
People who currently buy other brands, but are willing to buy your brand in the future

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Case study: TNS Digital Segment Targeting (DST) delivers significant consideration & booking lift for Holiday Inn® Hotels

1. TNS research identified consumers open to staying at Holiday Inn® Hotels

2. The audience was scaled by a leading Data Management Platform (DMP) to find 15 million similar consumers through a look-alike model

3. The 15 million unique cookies were added to the media plan and targeted directly

Result

- Lift in brand consideration*: 38%
- Consideration lift Vs. average of all other publishers**: 164%
- Lift in site bookings***: 514%

*The campaign was tagged and tracked by a 3rd party research firm. Control and exposed groups were recruited to complete a brand lift survey. The test/control research design isolated the impact of the campaign by requiring both groups to be identical outside of the ad exposure (e.g. same site visitation, demos, travel behavior, etc.). ** Measured against 9 other media platforms included in the campaign, including several of the most heavily visited sites in the US. ***Behavioral comparison of exposed vs. identical control group.
In summation
Despite the current landscape, the opportunities are greater than ever for MR to have an impact.

- Opportunity to **use** survey differently
- Opportunity to **help** other groups curate their data effectively
- Opportunity to **integrate data streams** to create new stories
- Opportunity to **demonstrate RORI** by helping to drive action

- **Understand consumer dynamics** in a more connected world
- **Think “both/and”** between traditional survey and SM
- **Leverage expertise** in data curation to improve SML capabilities
- **Help businesses navigate an evolving P2P**
- **Move from “data to measure” to “data to act”**

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To the being fully alive, the future is not ominous but a promise; it surrounds the present like a halo.

John Dewey