MMA SM2 Innovation Summit

NYC, September 28th 2015



Eric Salama

What I Am Going To Try And Do …

- Show you lots of stats about how mobile has become important
- Try and convince you that mobile-first thinking is critical or that a people-centric rather than a siloed approach to measurement and to ROI is necessary
- Show you lots of cool apps about what you can do with mobile devices
- Tell you how big and global Kantar is

Audience Measurement Has Evolved With TV

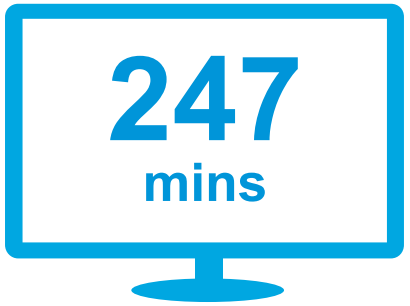
Core TV - viewing on the main screen

In the country where mobile and ecommerce have taken off, content consumption hasn't

In China, with 1.28 billion TV viewers, 649 million internet users:



Non-TV set viewing per day



Viewing on a TV per day

Source: CSM Media Research/Kantar Media

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Data Saving Lives

Red Cross uses health data via mobile to make crucial medical decisions

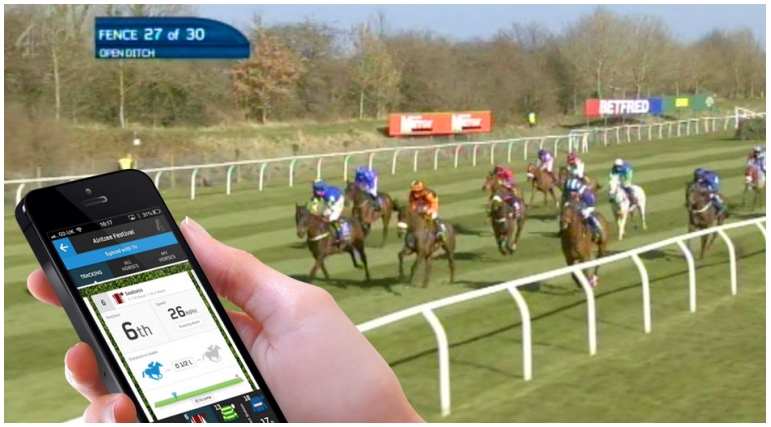




Horse Tracker: Sport Data

What was their need?

- Allow audiences to track their horses in perfect sync with TV
- Overcome the variable distribution network latencies



What was the outcome?

#1 free app in the App Store
+165,000 unique users during the event



monterosa

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What I Am Going To Try And Do …

- Discuss the opportunities it offers (with a research and insight bias in mind)
- Be clear about the barriers which stand in our way
- Ask for help in achieving what we need to achieve as an industry

What Can We Do Now That We Couldn't Do Before?

- Reach new groups of people whose attitudes and behaviour we want to understand
- **Understand them at the point of consumption**
- Understand their behaviour + attitudes : both of which are important
- **Understand them as people, not just as consumers of a given media**
- Give clients a real sense of "buy and why"

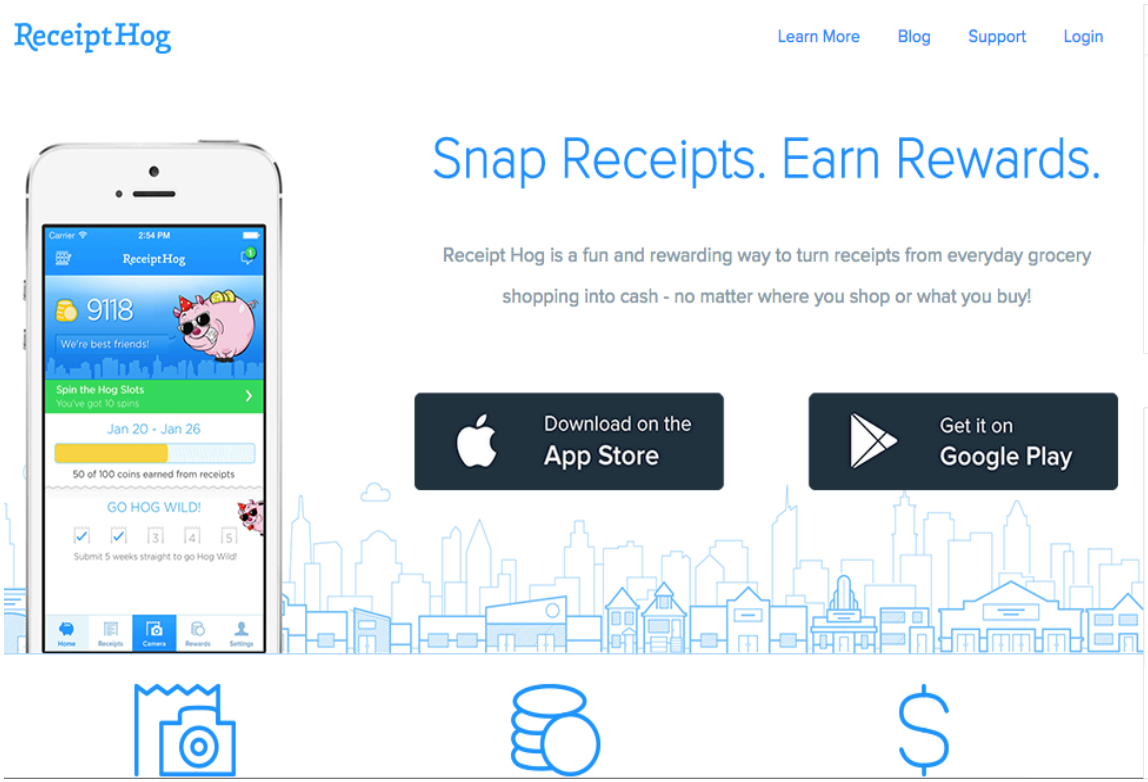




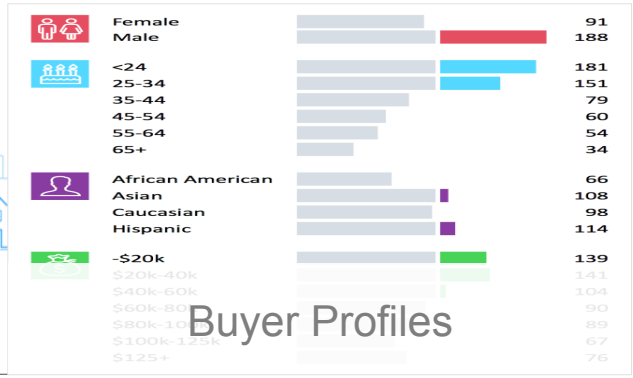
U.S. Purchases And Shopper Insights

InfoScout tracks purchases across brands and retailers

THE DATA ALLIANCE WPP







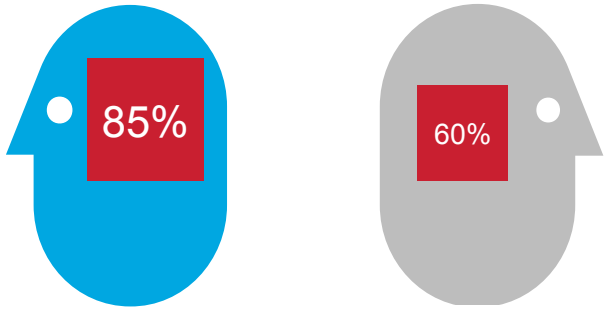
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Event Driven Survey : Comparing Bank Apps

App Satisfaction



Bank App ‘A’

20% claim easy to deposit checks

Bank App ‘B’

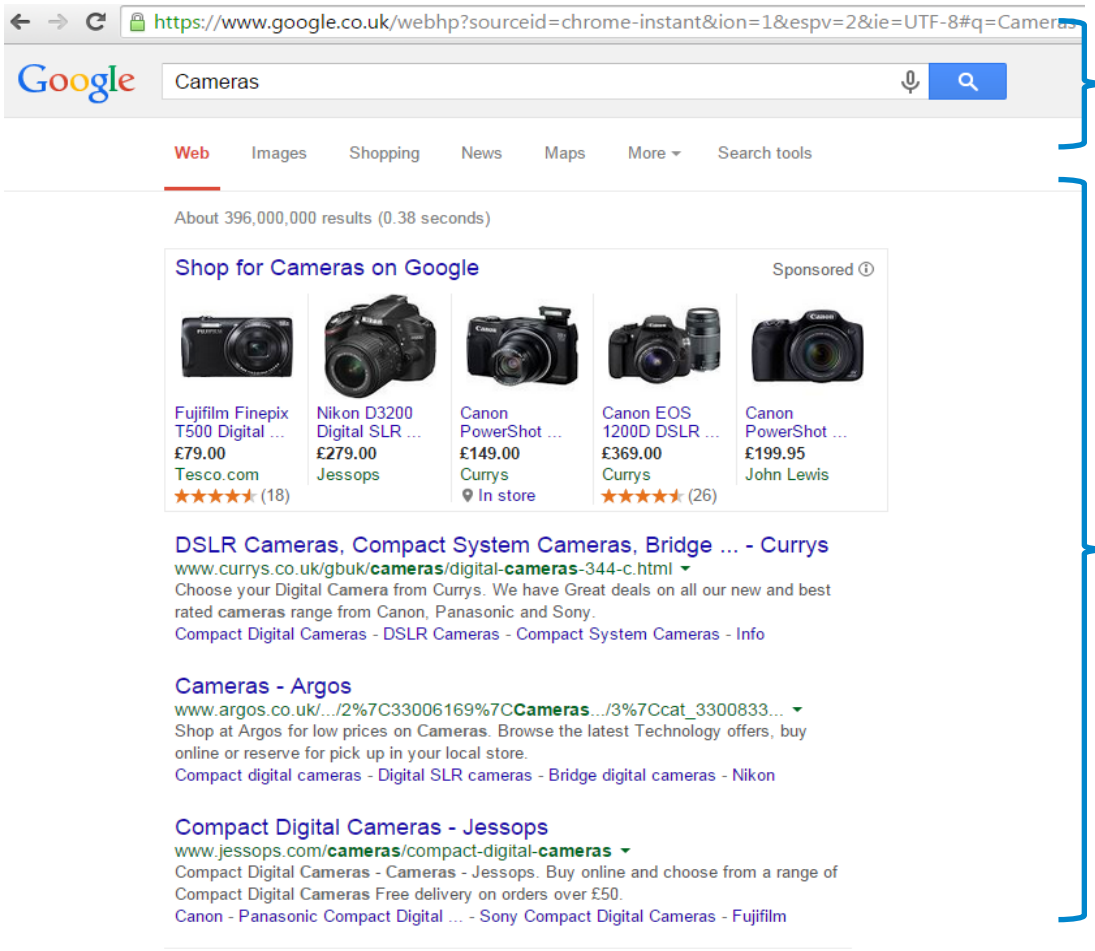
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Search Engine Results Pages (SERPs)

Who is searching for cameras …?

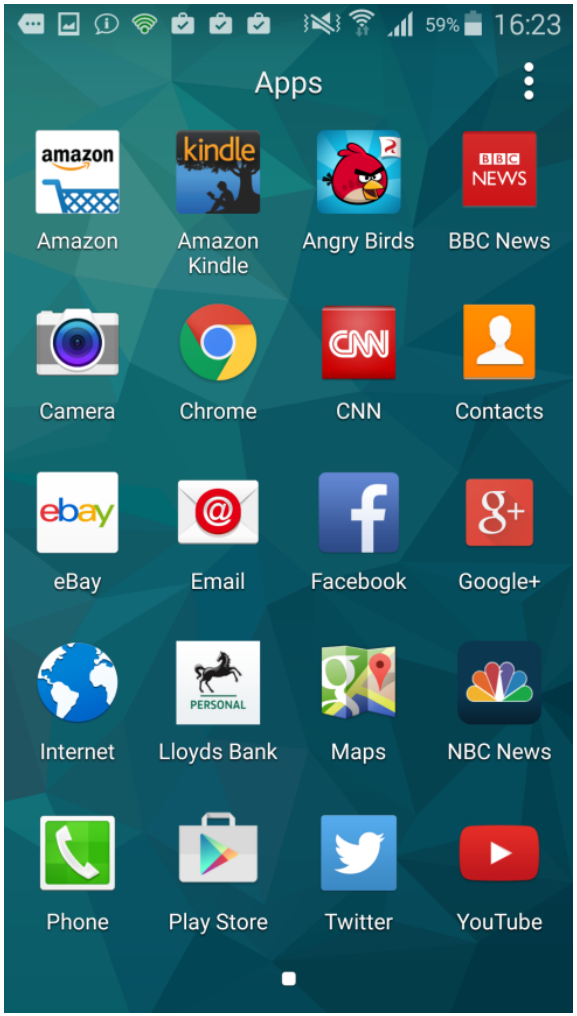


Meter data contains search terms typed

Meter data contains a list of the results

And we see what they do next …

App Data



You can answer questions like these:

"What apps do people have installed?"

"When do they use them?"

"How many e-bay users also use Amazon?"

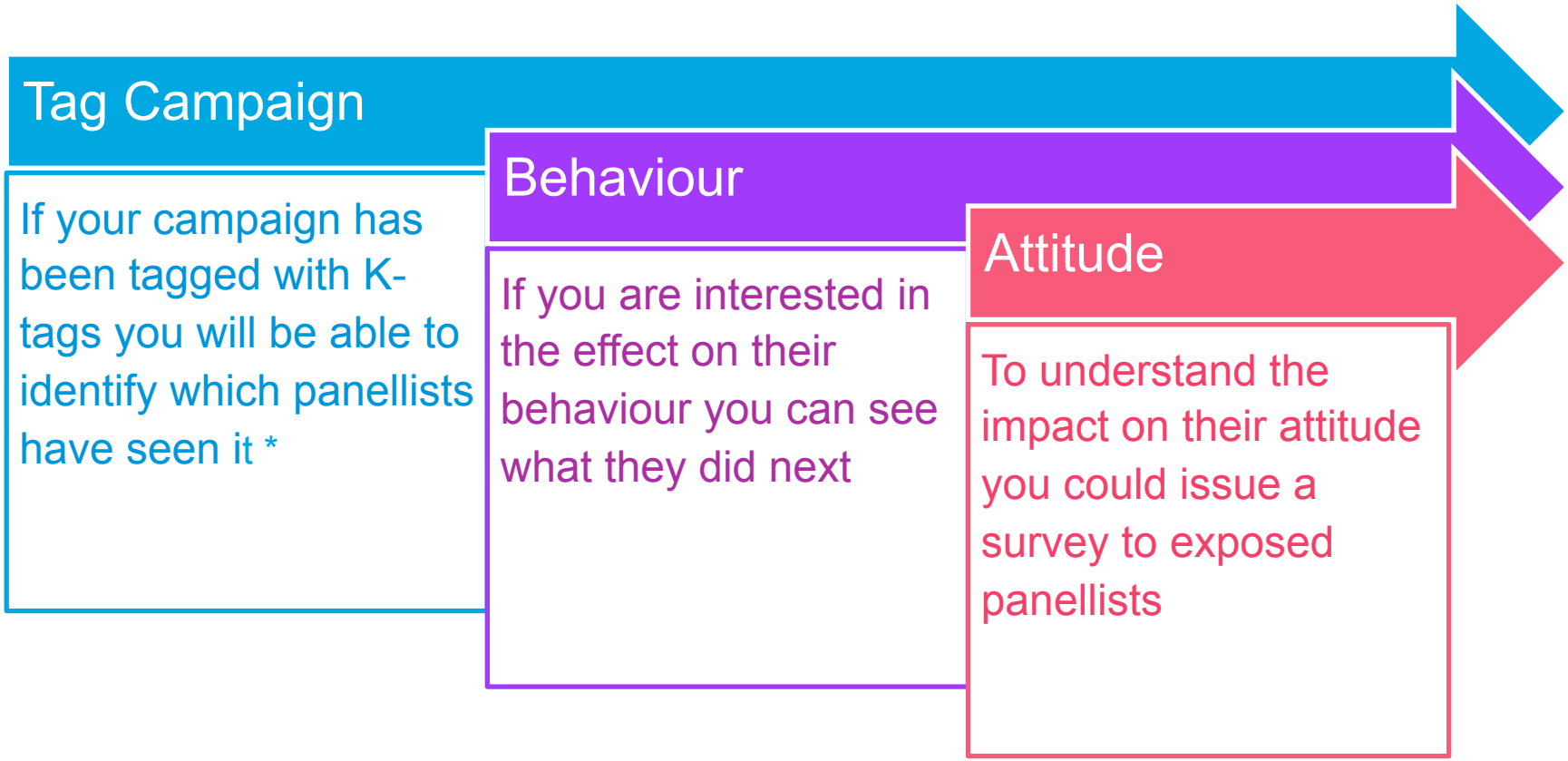
"What are people browsing or searching in apps?" *



* Some apps such as Twitter or Banking apps use encrypted data, you can see the pattern of usage but not the content

Advertising Exposure

“Has someone seen my ad and has it changed their behaviour?”



* Note that the size of the campaign and size of the meter panel will determine if a sufficient number of exposed panellists can be found

As An Example; Understanding The Second Click

Change in Cross-Shopping, Mobile vs. PC

	Amazon.com	Walmart.com
Amazon.com	n/a	+27%
BestBuy.com	+38%	-4%
HomeDepot.com	+8%	-34%
JCPenney.com	-8%	-24%
Kohls.com	+36%	-20%
Lowes.com	-8%	-45%
Macys.com	+36%	-5%
Sears.com	-5%	-23%
Target.com	+75%	+4%
Walmart.com	+33%	n/a

Read as: Mobile shoppers on Amazon.com are 38% more likely to also visit BestBuy.com than Desktop/PC visitors to Amazon.com

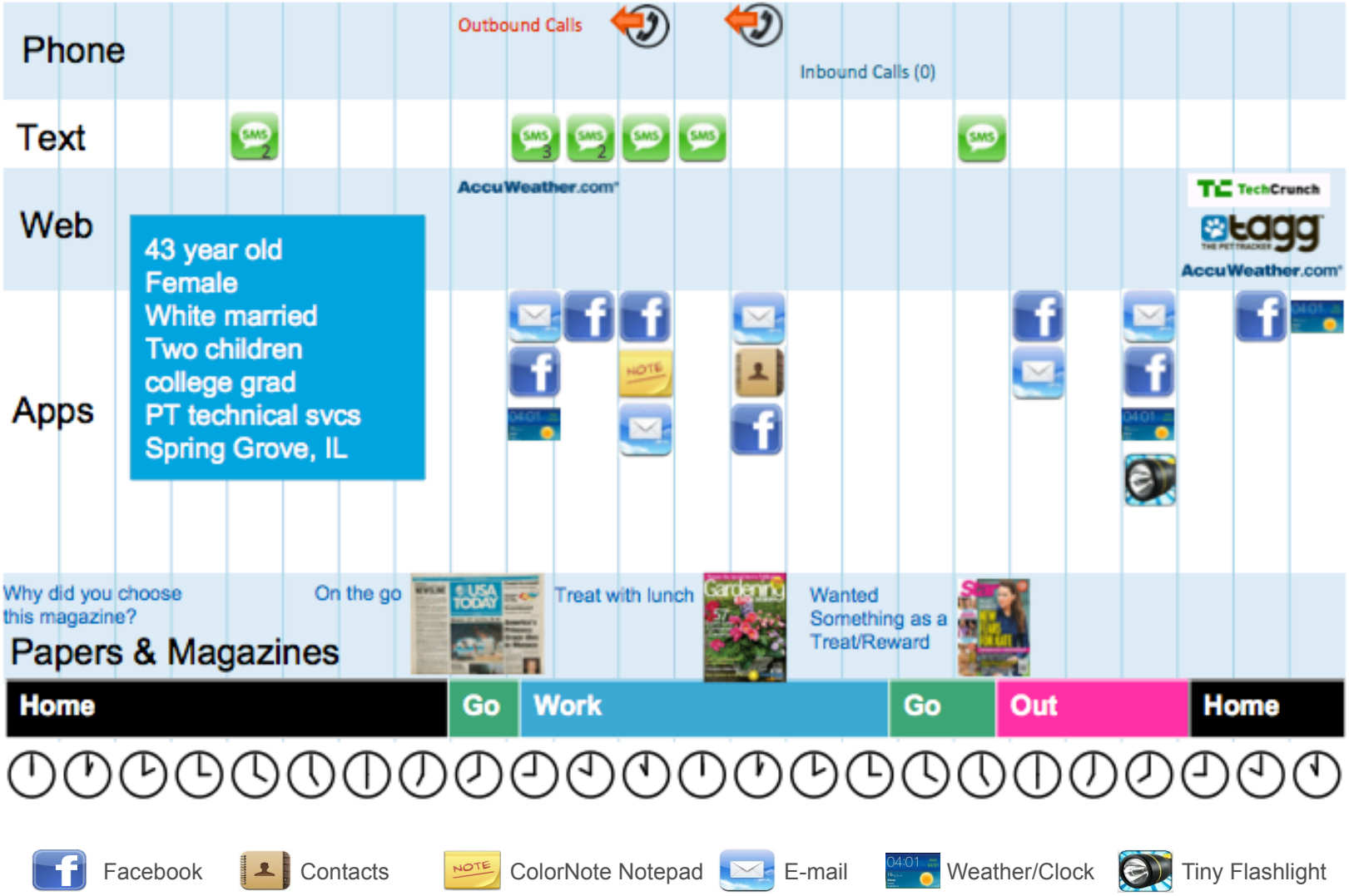
Amazon.com acts as the digital showroom.
When shoppers come to your site, how easy is it for them to find what they are looking for?

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Moving Towards A Person-Centric View Of The World



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What Are The Barriers We Need To Overcome To Offer This Consistently To Our Clients?

- We have
    - Cross-media measurement capability
    - Mobile panels

  in a growing number of markets but not in all

- Our “data spine” is constantly being enriched with new data

- We need to expand the number of “chefs” we have

- Unstructured data is complex to handle and not all of it is valuable

Sources Of Data About Mobile Behaviour

Tagging (K-Tag / Ignite panel)
(contact andy.greene@safecount.net)

"I want to measure campaign or website audiences or effectiveness"

"I can't tag the campaign or website I am interested in – e.g. paid search placements"

Mobile metering
(contact mobile@kantar.com)

"I want deep data from profiled panellists about media consumption across web and apps"

"I want handset-centric technical data such as operating system, data use, CPU, memory and signal strength"

Partner data (mobile carriers)
(contact guy.rolfe@kantar.com)

"I want census-level anonymous, aggregated data about location, online behaviour or phone and SMS usage … for segmentation or targeting"

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Transforming Our Skills

FARMERS



CHEFS



COLLECT → **CONNECT**

KANTAR

And For Genuine ROI

Integration of social media, trade data

Fusion and single source approach with purchase data (which we are already doing in 10+ markets around the world)

Our Approach Is …

Open source – we own a lot of data but we need to partner with other data providers

Not defensive – we are not trying to defend a monopoly in the US

Holistic – we are combining panel and census, qual and quant, mobile and desktop

So Please Help Us …

Pilot + Scale

Data + Insight

Understand + Target

Thank you!

