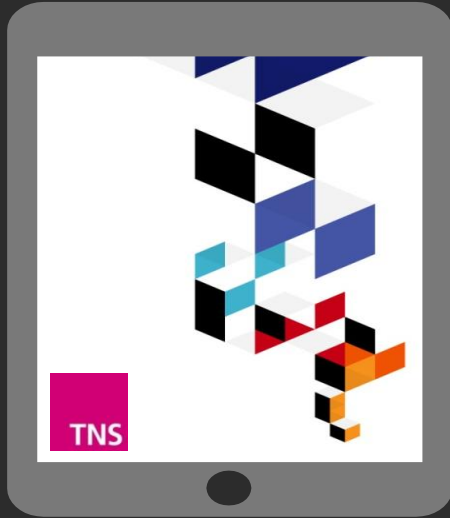


Mobile: Optimizing the Consumer Journey

Jon Briggs : Global Director,
Next Generation Solutions TNS Connect



Mobilize. Opportunities for Marketers'



[1]

Momentary Marketing

[4]

Speed of Business

[2]

Curated Experience

[5]

Consumer Journey

[3]

Find Time

[6]

Mobile as First Screen

From the Uniqueness of Mobile



User Base



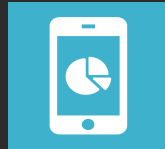
Personal



Location



Fragmentation



Social & Communication



Ecosystem

Advantages of Mobile for Marketer 's

Advantage

Why it matters?

Consumer' s actual behaviours



- Develop nuanced and differentiated consumer strategy

Connected Consumer Decision Journey



- Focus on the entire consumer intent and journey

Capture the *momentary* consumer



- Add in the *why?* Not just the *what?* – closer to the moment of truth

Context



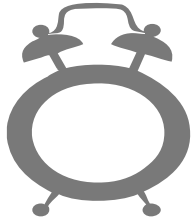
- Connect in other consumer data to drive relevance / curation

Competitive



- Discover / understand consumer experience with competitive offers : drive differentiation & switching

The Potential of Mobile in Research



Active Mobile

Mobile administered diaries / questions in key and precise moments of truth deliver *momentary research*



Passive Mobile

Track consumers actual behaviours on apps, websites, built-in and more aspects of ecosystem for always on view of consumers



Connectors

Triangulation, Location, GeoFencing, Fingerprinting, Photos, Videos, Sensors, Audio Fingerprinting, Time Stamps, Barcodes...

Actual Behaviours in the Ecosystem

Mobile web, apps and phone features

Apps

Web

Built-In

Media

Net
work

Commun
ication

Move
ment

Perform
ance



Windows



BlackBerry

Symbian



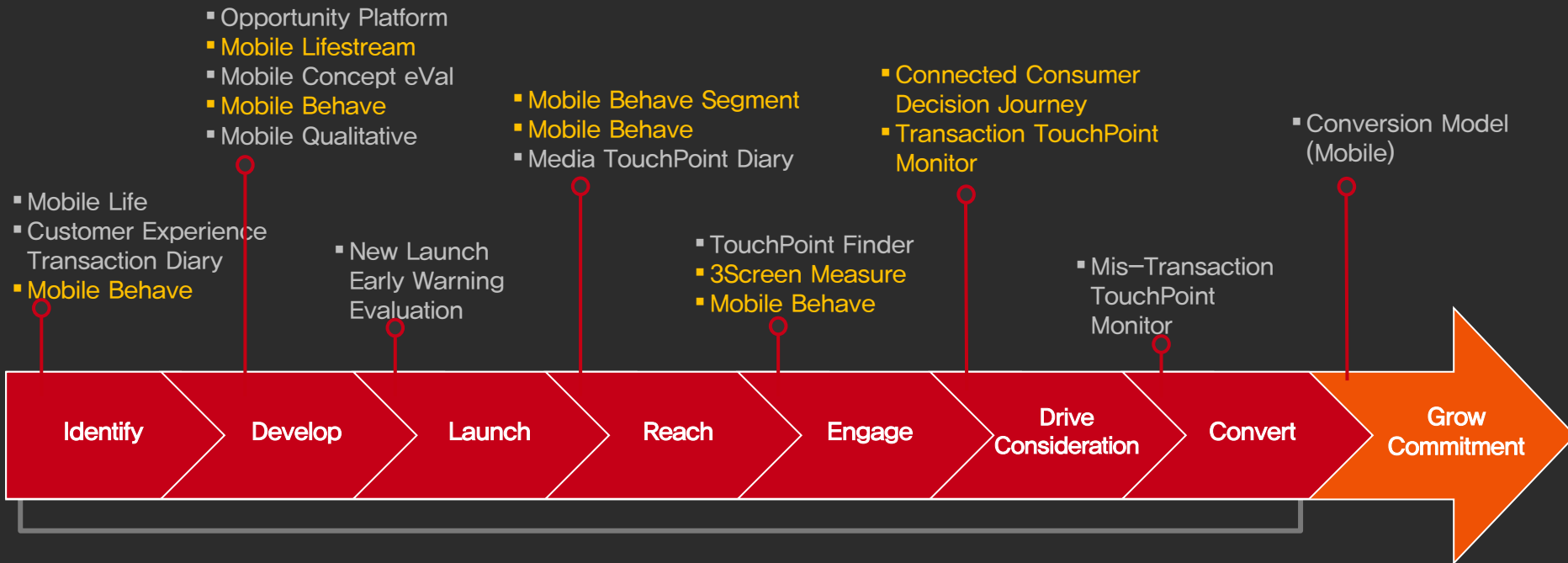
Holistic understanding through real time data capture

Generating 360-degree analytics on device, app and browser – coupled with survey data from the same person



Mobilize. TNS Connect Opportunity

Tools for understanding Connected Consumer Brand Relationships



United States

Optimising TouchPoints

FMCG Company: Deeper understanding of the Consumption Moment



Market Opportunity

- Deliver growth through deeper understanding of consumer behaviour & context
- Understand 6W's of consumption for product, messaging delivery



Client Business Issue

- When do consumers snack? Which occasions?
- What needs are met? What emotions are experienced at the point of purchase and consumption?



Research Design

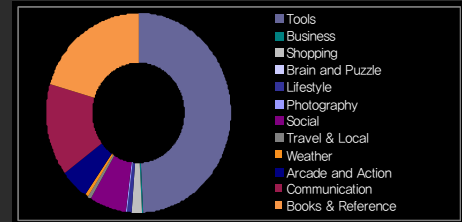
- Two week mobile consumption diary
- Up to 10 questions per occasion
- Use mobile behaviours to understand context



Outcome

- 6W's knowledge
- Product portfolio is key
- Understand **context of consumption**
- Enhanced social, mobile strategy

United States & China Optimising TouchPoints

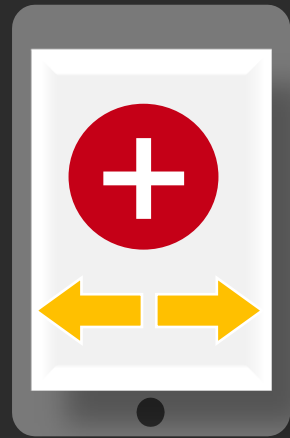
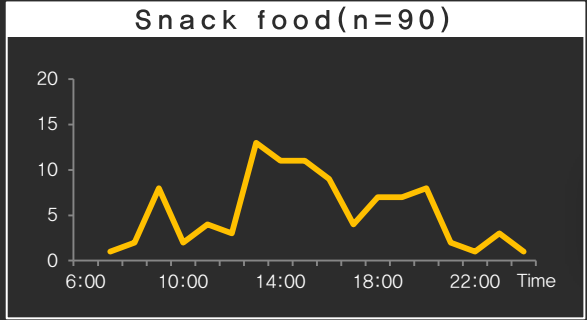


[1] Future Proof

[2] Expand Globally

[3] Emotion

[4] Context, Relevance



China

Prioritising Investments in the Ecosystem

Media Company: Basing media decisions on actual consumer behaviour, not claimed



Market Opportunity

- To reach and influence the right consumer, with the right content, using the right delivery channel in the right moment in the consumer journey



Client Business Issue

- **Prioritise investments** in the mobile ecosystem based on current behaviours
- Build nuanced strategy based on usage deltas across the ecosystem



Research Design

- Draw from panel
- Monitor actual behaviour over time
- Report on behaviour across the ecosystem



Outcome

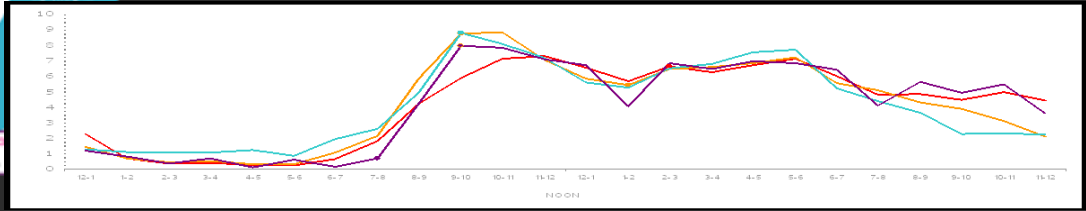
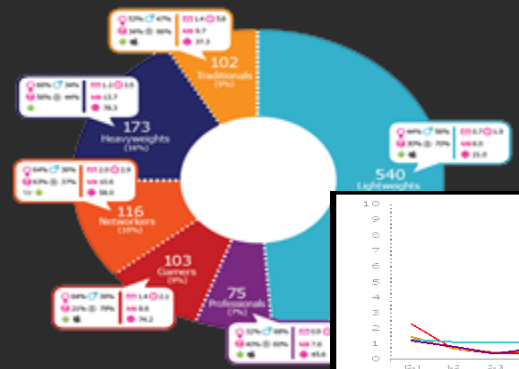
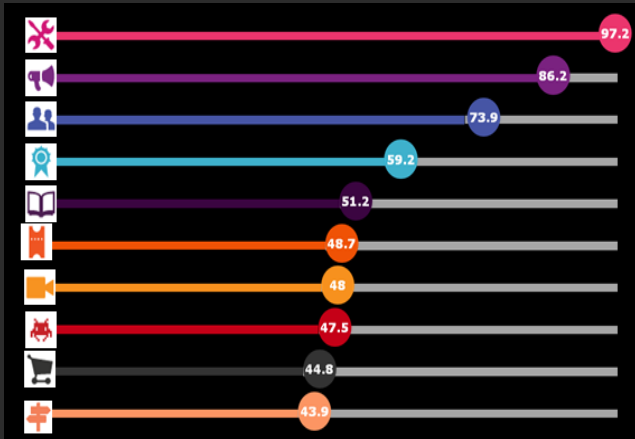
- Client made investments in appropriate app categories
- Search and social outreach optimised based on usage dynamics
- Use appropriate communication channels

China

Prioritising Investments in the Ecosystem



	Shopping	Social	Communication	Books	Entertainment	Media/Video	Music/audio	News/mags
Sunday	12	15	17	16	19	20	24	14
Monday	11	13	10	12	11	10	14	12
Tuesday	16	15	14	13	14	10	15	12
Wednesday	10	14	14	16	12	13	9	10
Thursday	16	16	15	16	14	13	12	20
Friday	22	14	14	14	17	20	11	15
Saturday	12	14	17	13	13	14	15	16



- [1] Actual Behaviours
- [2] Communication Breakdown
- [3] App vs web
- [4] Validated Discussions

United States & China

OmniPresence

Technology Company: Understanding behaviours between multiple screens / devices



Market Opportunity

- Build appropriate content and offer that plays to the consumer utility on each screen
- **Seamless experience** by screen



Client Business Issue

- Need to understand consumer behaviours across screens
- What is the sequence of behaviour?
- What is simultaneous behaviour?



Research Design

- Recruit panelists, complete profiles
- Monitor behaviour on PC, Mobile & Tablet
- Report on actual behaviours



Outcome

- Client installed differentiating pre-loaded apps on each device
- Messaging was enhanced to help ecosystem partners
- Experience was synchronised by screen



United States & China OmniPresence

MONDAY



24:7



- [1] Future Proof
- [2] Informed Ecosystem
- [3] Enter new device market
- [4] Connect to other data

United States

Media Efficiency

FMCG Company: Basing media **decisions** on actual consumer exposures, not claimed



Market Opportunity

- Lower costs, Raise effectiveness of media & influence touchpoints
- Base decisions from **actual exposures**, not claimed exposure



Client Business Issue

- Client wanted to allocate expenditure optimally across TV, Internet (inc. video) & Mobile
- Understand outcomes on brand from overall media



Research Design

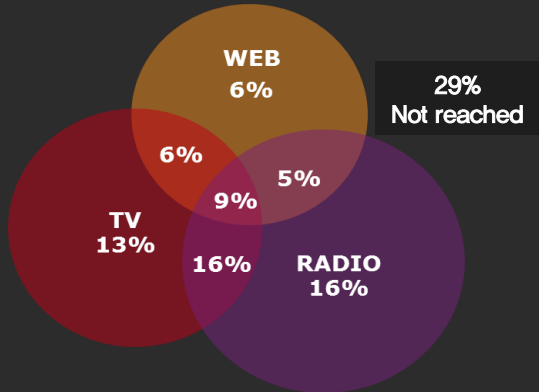
- Recruit Panel
- Install Mobile audio fingerprinting app
- Listen for pre-defined content
- Measure exposure



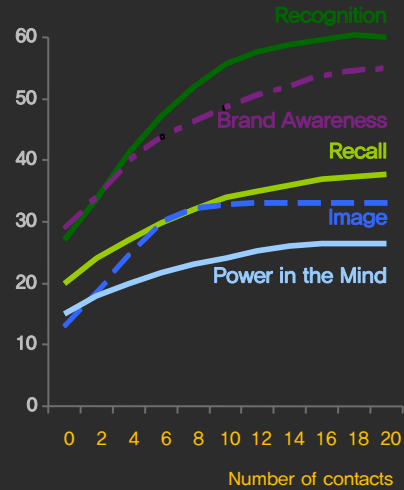
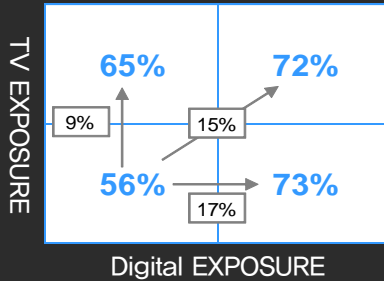
Outcome

- Validation : Core brand message
- Allocation : Altered mix between TV and Digital to deliver stronger response
- Nuance : Better understand what each aspect is delivering

United States Media Efficiency



Brand X Key attribute



[1]

Exposure

[2]

Allocation

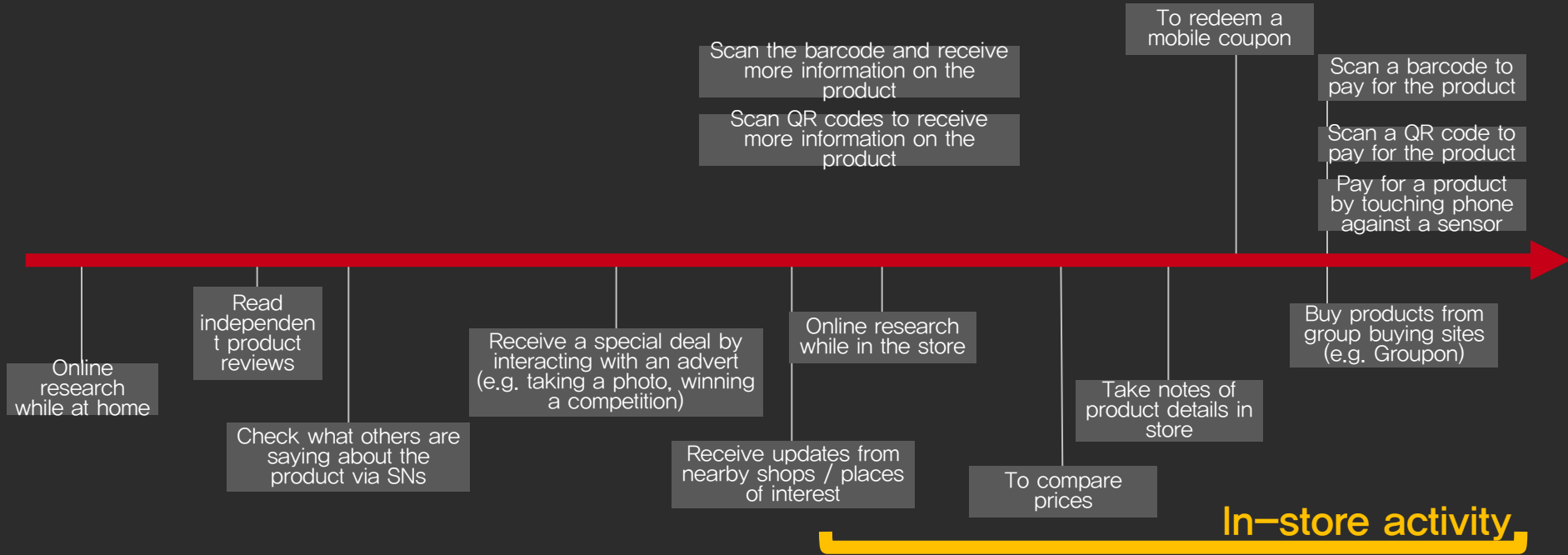
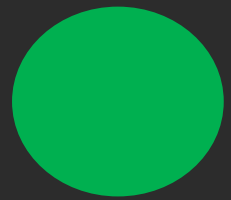
[3]

Synchronisation

[4]

Lower costs

Discover the Connected Consumer



Source: TNS Mobile Life 2012-Q F2, Usage of mobile for purchase or research
Base: Those who have used mobile for purchase/research: - USA 242

Helping Achieve Organisational Growth Goals

Product Development

[Fragmentation]

What are actual behaviours across OS / Hardware / DayPart to differentiate us?

Marketing

[Barriers]

Can we overcome hurdles in the consumer journey to move them along?

Sales

[Curated Experience]

What is the information opportunity in the consumer journey to steal / grow share?

Customer Experience

[Emotion]

Momentary perspective on passion / pain points with the journey to deliver store back / advocacy experience?

Technical

[Delivery]

Channels to Connect with consumers to influence more completely?

Ecosystem Partners

[Validation]

Develop offers to grow the basket size / new consumers of business partners?

Thank you

Mobile Behave에 관한 자세한 내용은 Digital사업부 권성은 본부장에게 연락 주십시오.

[Contact Info.]

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