

Brand Media Monitor IX

Edition 2018 - 2020

The fastest way to understand your brand



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What makes Brand Media Monitor unique ?



Brand Media Monitor (BMM)

The USP's



- The BMM starts where the CIM surveys end :
 - richer descriptions **of people** (>< *CIM : merely socio-demographics*)
 - relevant segmentations of 1000+ **brands** (>< *no brands in CIM TGM*)
 - A 360° and 3D approach of **media** and touchpoints (>< *still no 'roof' above tactical surveys CIM*)
- **A unisource combination** of people, brands and media
- A **solid data collection method** : single source (three waves) , self-administered online questionnaire, large representative sample (n=5.000 +)
- A **long term project** : bi-annual, stability and innovation
- Integration of internationally validated **research tools** : Semiometrie, Connected Life, TGI attitudes, ... that offer exclusivity and insight
- A differentiated offer for **all industry parties** : media owners, sales houses, media agencies, advertisers, agencies, researchers, ...
- Member survey of the international **TGI network (Kantar)**

BMM IX (2018-2020)

The Concept



BMM IX (2018-2020)

The Content



BMM IX (2018-2020)

The method

- Ninth wave of the study (° 2001), launched May 15, 2018
- Sample
 - N = 5.177
 - Representative of the Belgian population aged 18-75 years
- Method:
 - Online Self Completion (TNS OAP panel + preferred suppliers)
 - 3 Questionnaires of 1h., single source
 - 3 shortened versions of each questionnaire (40') , linked together in one database through a validated ascription
- Period of Fieldwork:
 - From 16/2/2018 till 19/3/2018
- Reweighing towards the CIM Golden Standard (Sex, Age, Education, Profession, Social Group, Region, Language)



BMM IX (2018-2020)

The Novelties



Methodology :

- Larger sample: From 4.860 (BMM VIII) to n= 5.177
- Broader universe: From 18-64 years to 18-75 years
- 3 questionnaires per respondent instead of two (better response rate, less respondent fatigue, more valid responses)
- Still single source but with abbreviated versions of each questionnaire per respondent
- Merger of different versions through validated ascription
- Hub for extra ad-hoc surveys (single source) : Kantar TNS + clients

Database :

- Restructuring of survey in Galileo
- Possibility to acquire the database for proper software
- Belgian hub for TGI

BMM IX (2018-2020)

The Novelties



People :

•**Socio's** :

- Alignment with both CIM and TGI
- Grandchildren (number, care of)

•**Typo's** :

- TGI Attitudes; From 132 to 185 statements / update Dimensions
- Shopper Typology: Some shopper questions from TGI integrated
- Connected Life: Creation of a Super Leader group
- Introduction of Leisure Activities & Hobbies

BMM IX (2018-2020)

The Novelties



Brands :

- **Main Sectors (43):**

- Revised sector list (meal boxes, home delivery, webshops,...)
- Updated list of purchase locations
- Motivations : Reviewed list, adapted per sector
- Word of Mouth / Opinion Leadership: Simplified segmentation
- Out : Touchpoints in Path of Purchase

- **Category Information (99)**

- Updated list (webshops, fresh fruit & vegetables,...)
- Splits (beers vs spirits, kitchen stores vs deco stores,...)
- FMCG : purchase + usage (respondent / HH member)

- **Specific categories** : New questions :

- Banking and insurance products
- Payment methods
- Bio products
- Out : purchase intentions durables, tobacco

- **Brands (1110) :**

- Updated list of brands, more brands (1110)
- BMM Brand segmentation: new labels

BMM IX (2018-2020)

The Novelties



Media :

- **Mediatypes** : New separate media categories: Free TV, Pay TV, search engines, social media and messaging, apps
- **Print** :
 - Dailies: Distinction between paper, digital version and website / use of devices for all titles combined
 - Magazines : use of devices for all titles combined / review of titles
 - Longer lists of topics of interest
- **TV** :
 - Out: Children's channels
 - Internet via TV activities
- **Audio**:
 - Vinyl/CD/Downloads
 - Podcasts
 - Music recognition
- **Outdoor** :
 - Reformulation of the question

BMM IX (2018-2020)

The Novelties



Media

- **Internet : New subdivisions**

- Inform : Use of search engines , information activities
- Communicate : Instant messaging, social media, communication activities
- Buy: Online shops : products and activities, shopping apps
- Play: Online gaming: activities
- Apps: Genres
- Activities while surfing

- **Touchpoints :**

- Longer list (50+) of advertising channels and touchpoints

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What does the
Brand Media Monitor
tell us about Products and
Brands?



44 sectors
99 product categories



Sectors (44) and Product Categories (99)



1 Voeding	12 Multimedia- en electrowinkels	25 Bouwmateriaal
1 soepen (5)	38 Multimedia- en electrowinkels (7)	73 Bouwmateriaal (10)
2 koude sauzen (11)	13 Huishoudproducten	26 Energieleveranciers
3 warme sauzen / pasta (11)	39 Luchtfierissing (3)	74 Energieleveranciers (11)
4 culinaire ingrediënten (8)	40 Schoonmaakproducten (22)	27 Interimkantoren
5 boterhampasta (5)	41 Waspoeders en wasproducten (12)	75 Interimkantoren (7)
7 zoetmiddelen (5)	42 Wasadditieven / wasverzachtters (17)	28 Tankstations
8 desserts (17)	43 Vaatwasmachineproducten (5)	76 Tankstations (9)
9 boter, margarine, olie (16)	14 Voedsel voor dieren	29 Immobielkantoor
10 producten uit diepvries of koelvak (7)	44 Voedsel voor dieren (5)	77 Immobielkantoor (2)
11 bakbenodigdheden (5)	15 Verzorgingsproducten	30 Auto's
12 ontbijtgranen, havermout, muesli (3)	45 Douchegel en badschuim (13)	78 Auto's (36)
13 ijs (12)	46 Tandpasta en mondspoeling (10)	31 Autobanden
14 Kazen (15)	47 Deodorant (9)	79 Autobanden (10)
15 Verse groenten en fruit (8)	48 Shampoo (16)	32 Autospecialisten
16 Fijne vleeswaren (7)	49 Ontharing en scheren (5)	80 Autospecialisten (9)
2 Maaltijdboxen	50 Babyzorg (9)	33 Fastfoodketens / maaltijden aan huis
65 Maaltijdboxen (8)	51 Haarkleur (13)	81 Fastfoodketens / maaltijden aan huis (11)
3 Zoete en hartige snacks	52 Haarstyling (10)	34 Kamspelen
17 Zoete snacks (16)	53 Vrouwelijke hygiëne (5)	82 Kamspelen (18)
18 Zoete snacks (18)	54 Toilet papier (4)	35 Speelgoed en -winkels
19 Chocolade en pralines (5)	55 Papieren zakdoekjes (3)	83 Speelgoed / speelgoedwinkels (8)
20 Kauwgom en pastilles (6)	56 Producten tegen incontinentie (3)	36 Transport
4 Niet-alcoholische dranken	16 Cosmetica	84 Transport (14)
21 Frisdranken (19)	57 Parfums (22)	37 Touroperators en booking sites
23 Water (10)	58 Gelaats- en lichaamsverzorging (30)	85 Touroperators en booking sites (13)
24 Sappen (12)	59 Make-up (9)	38 Pretparken, vrije tijd
25 Energie dranken (7)	17 Gezondheid en farmacie	86 Pretparken, vrije tijd (22)
27 Probiotische zuivelproducten (4)	60 Vitamines (6)	39 Banken
28 Melk en substituten (12)	61 Pijnstillers (7)	87 Banken (29)
5 Koffie en thee	62 Medicatie neus, keel, oor (10)	40 Kredietkaarten
22 Koffie (15)	63 Medicatie spijsvertering (6)	88 Kredietkaarten (5)
26 Thee (3)	64 Pleisters/Verband/Koortsblazen (4)	41 Verzekeringen
6 Alcoholische dranken	18 Afstankings technieken	89 Verzekeringen (30)
29 Aperitieven (5)	66 Afstankings technieken (4)	42 Multimedia
5 Sterke dranken (19)	19 Optiek	90 Computermaken en informatiesoftware (8)
30 Bieren (27)	67 Optiek (15)	91 Fototoestellen (7)
7 Supermarkten	20 Doe-het-zelf-winkels	92 Printers en scanners (4)
31 Supermarkten (31)	68 Doe-het-zelf-winkels (8)	93 Spelcomputers (3)
8 Drogisterij / Parfumerie	21 Producten voor de tuin	43 Televisies
32 Drogisterij / Parfumerie (7)	69 Producten voor de tuin (6)	95 Televisies (6)
9 Kleding en kledingwinkels	22 Keuken-, meubel- en decoratiewinkels	44 GSM-toestellen
33 Kleding en -winkels (30)	70 Keukenwinkels (6)	96 GSM-toestellen (13)
36 Sportkleding en -winkels (11)	94 Meubel- en decoratiewinkels (13)	45 Providers Telefoon-, Internet, Digitale TV
37 Lingerie en -winkels (13)	71 Matraswinkels (7)	97 GSM-operators (11)
10 Webwinkels	24 Elektrische huishoudapparatuur	98 Internetproviders (8)
34 Webwinkels (16)	72 Elektrische huishoudapparatuur (29)	99 Leveranciers digitale TV (9)
11 Schoenen en schoenenwinkels		
35 Schoenen en schoenenwinkels (13)		

Sectors & Product Categories

OVERVIEW



For 44 Sectors : Standard questions

- Shopping locations
- Motivations for brand choice
- Word of Mouth

For 99 Product Categories : Standard Questions

- Usage and purchase
- Frequency of purchase
- Frequency of usage

For some categories :

- Sectorial Questions
- Budgets
- Retail brands
- Light products
- Bio products

Brands

1110 Brands



Brands Overview



1110 brands , grouped per category

For each brand : Standard Questions

- Awareness (*filter question*)
- Usage
- Attitude
- Recommendation (Net Promotor Score)

Brands

Three Dimensions



Dimension 1: Awareness

- I know this brand, even if only by name
- I don't know this brand

Dimension 2 : Behaviour

- I use this brand regularly
- I use this brand now and then
- I use this brand less often
- I 've used this brand, but not anymore
- I have never used this brand
- Note : different wording (use, consume, visit, buy, drive, play, am client, ...) according to category (see excel)

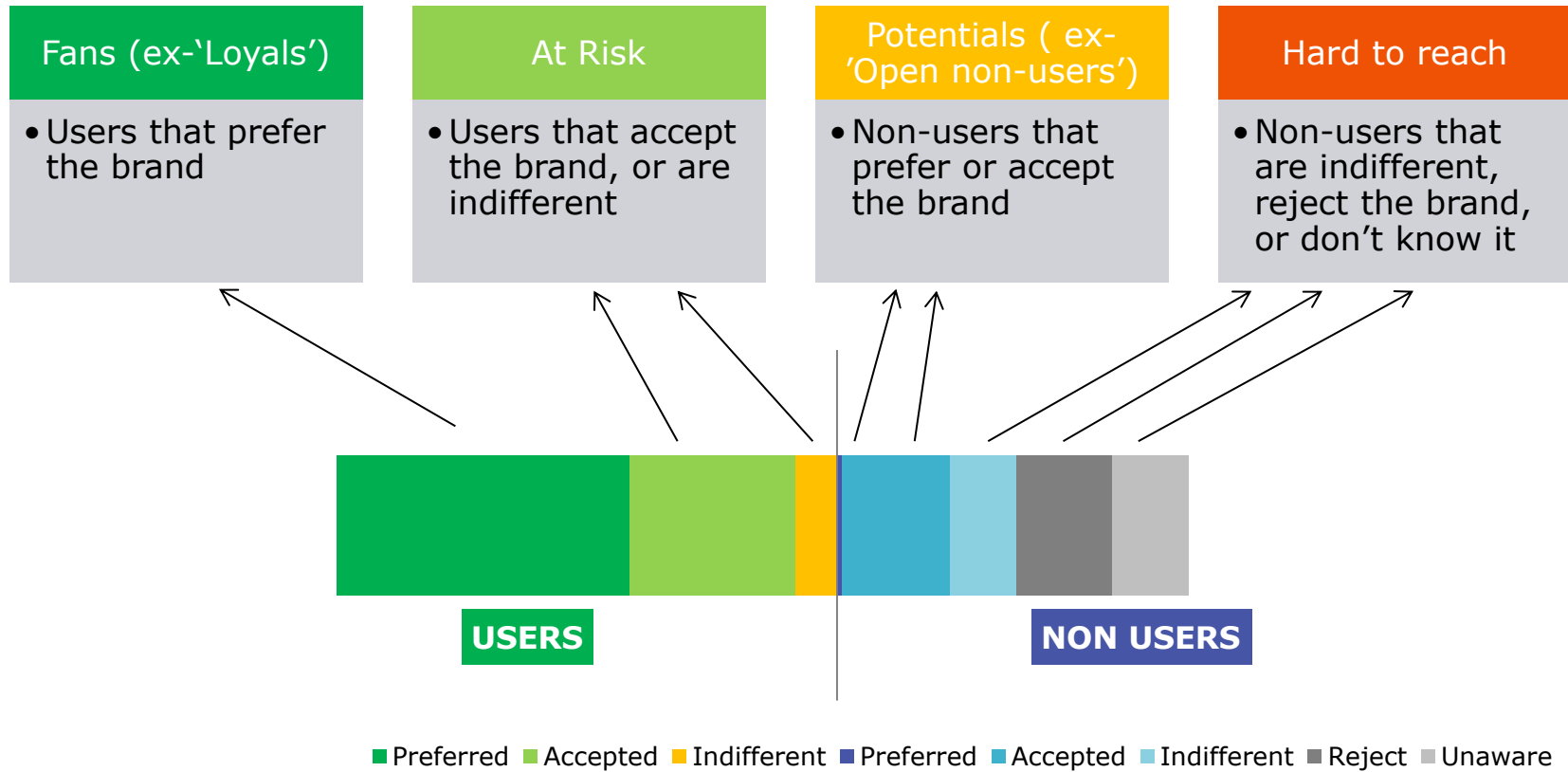
Dimension 3: Attraction

- It is my favourite brand (preference)
- I could choose this brand (acceptance)
- I don't know whether I would choose this brand or not (neutral)
- I wouldn't choose this brand (rejection)

Brands

BMM Brand Segmentation

Based on Awareness, Usage & Attitude



Brands

Recommendation (Net Promotor Score)



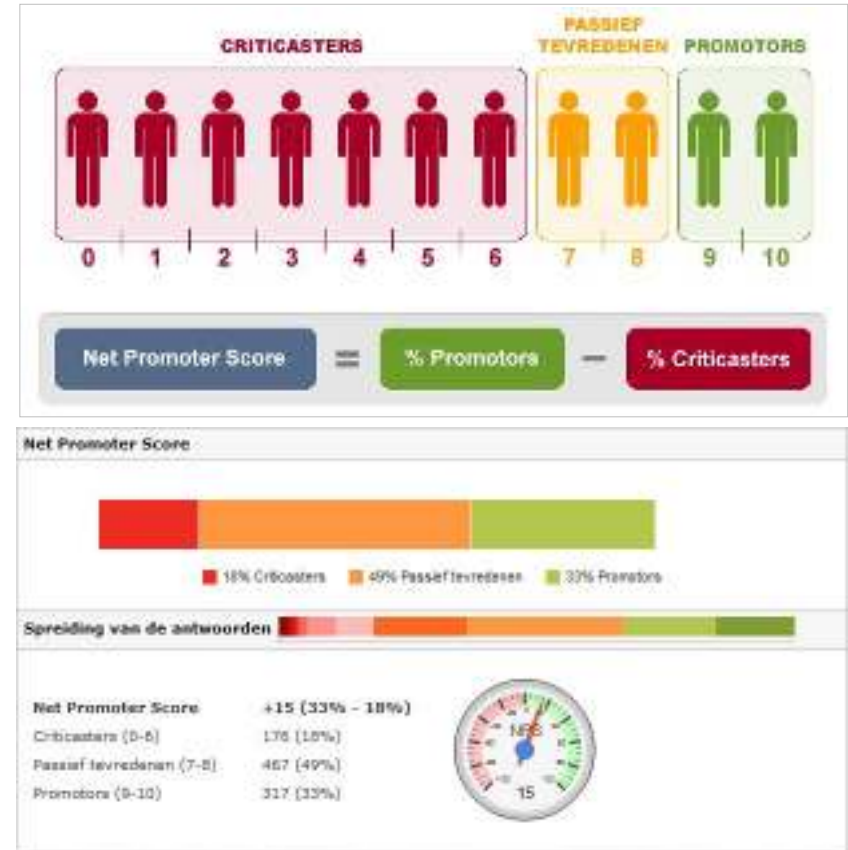
■ What ?

- Popular measurement of customer satisfaction (° Reichheld)

■ Question :

- Base : Users of the brand
- Wording : 'To which degree would you recommend this brand to friends, family or colleagues ?'
- Scale : from 0 (very unlikely) to 10 (very likely)

■ Calculation Net Promotor Score + example:



3

What does the
Brand Media Monitor
tell us about people?



People Overview



- **Socio-demographic profile**
 - All CIM Golden Standard socio-demographics
- **Semiometrie**
 - Psychological Profile : Description of people and target groups in terms of values and emotions to which they adhere or which they reject
- **TGI Attitudes**
 - Socio-cultural Profile : 180+ statements on socio-cultural topics + positioning on **9** dimensions
- **Shopper Profile**
 - Three typologies (FMCG, durables, services) based on statements about shopping behaviour
- **Innovation Segmentation**
 - Segmentation of consumers in terms of their attitude and behaviour towards change = identification of early adopters
- **The Digital Consumer : Connected Life**
 - A classification of people according to their attitudes toward the internet and social media
- **Leisure Activities**
 - A list of hobbies and events visited

People

Socio-demographic profile



CIM Golden Standard Criteria

RESPONDENT

- Gender
- Age
- Education
- Activity
- Profession
- Role (Main Purchaser, Head of Family)

HEAD OF FAMILY

- Age
- Education
- Activity
- Profession

MAIN PURCHASER

- Age

HOUSEHOLD

- Family Size
- Presence of Children
- Social Class
- Life Stages

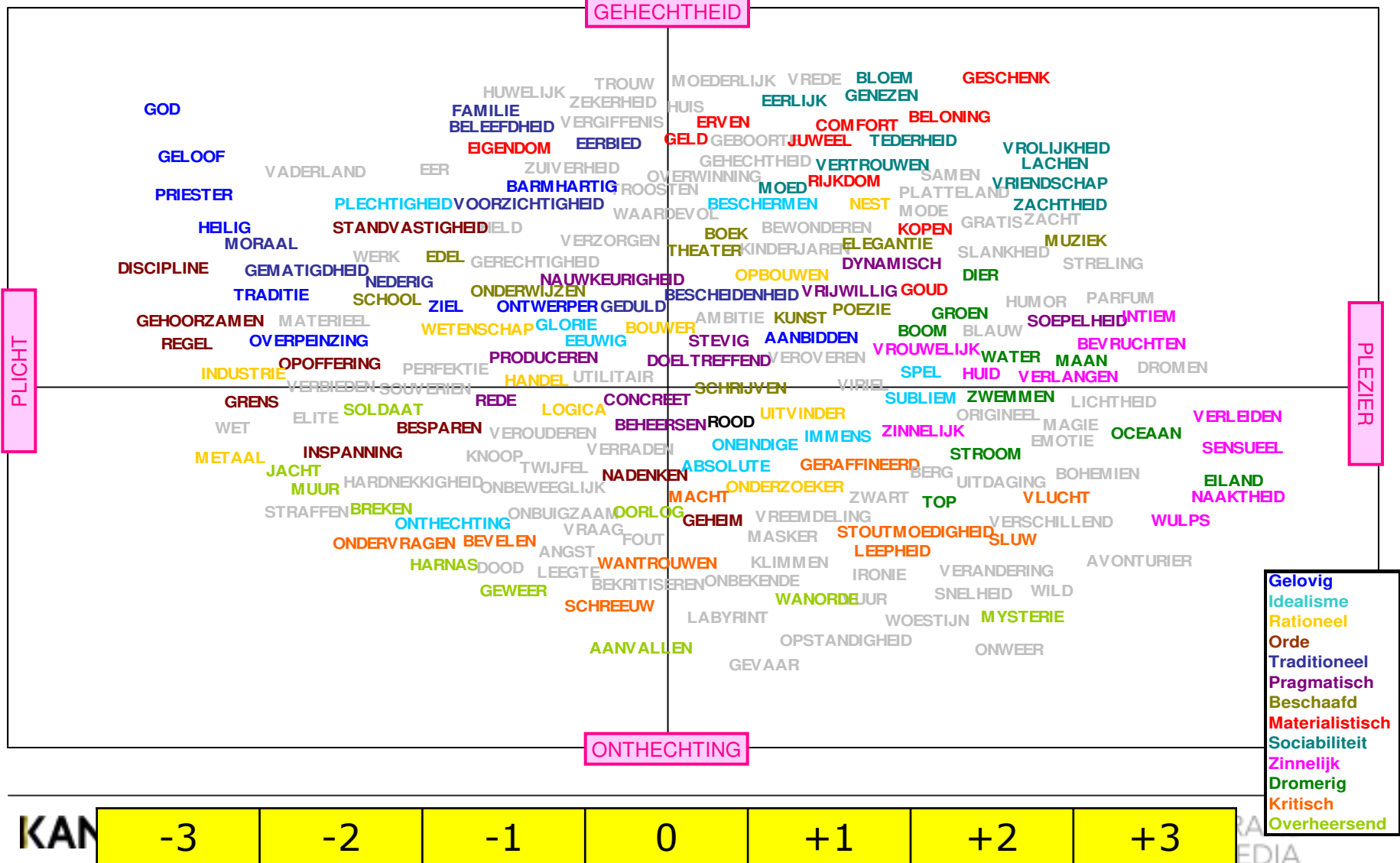
GEOGRAPHY

- Language
- Nielsen
- Provinces
- Habitat

Extra Criteria

- Generation
- Relational Status
- Grandchildren (number, care of)

Emotions and values (Semiotique)

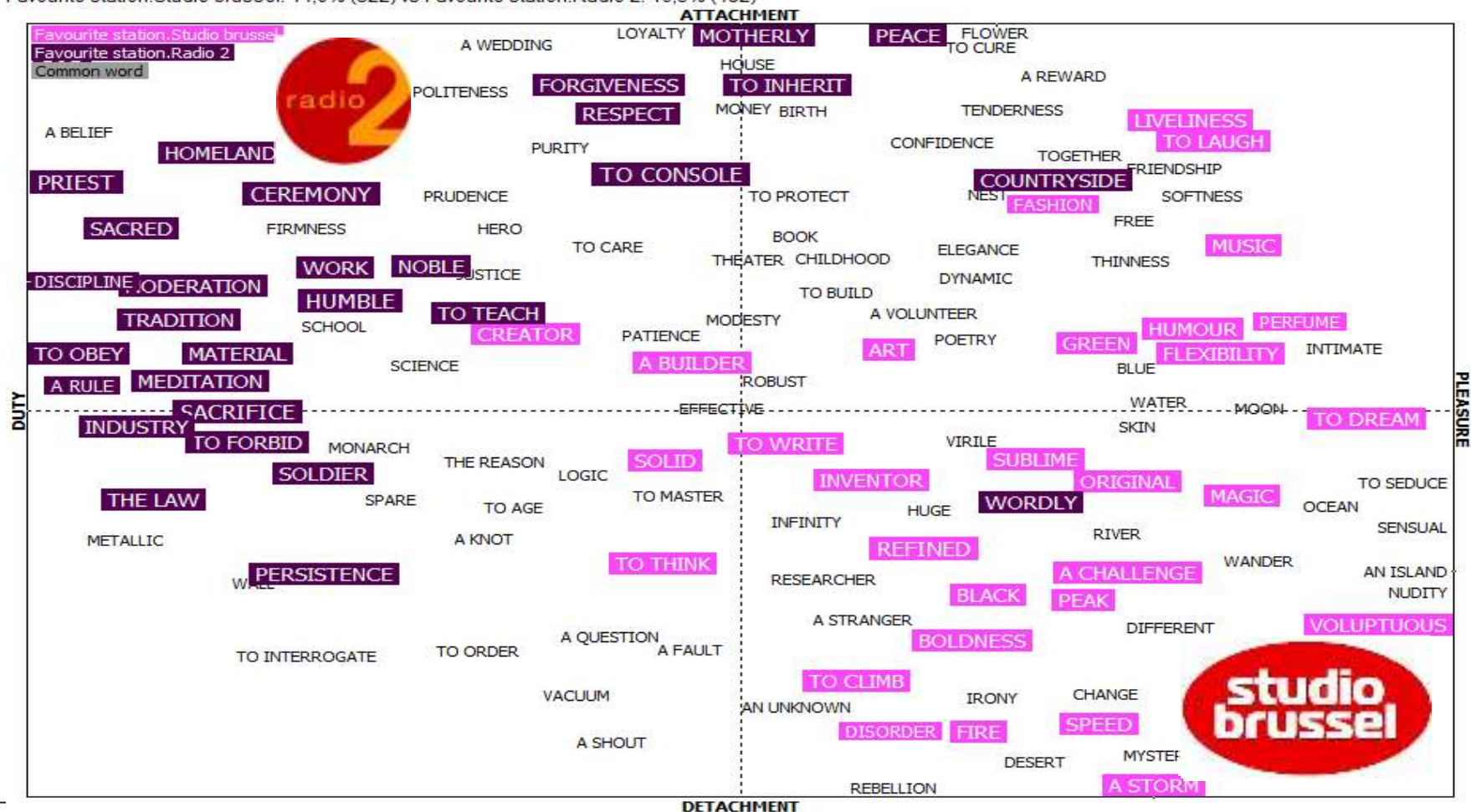


People Semiotrie

TNS media

Targetgroup: 18-64 : 3.814.723 (000)

Favourite station.Studio brussel: 14,0% (322) vs Favourite station.Radio 2: 16,5% (482)



People:

Socio-cultural attitudes (TGI)



- What ? : A series of attitudinal and lifestyle statements, covering a large range of socio-cultural topics : communications, technology, self perception, ethics, status, interests, health & beauty, shopping , consumption (food & drinks, travel, finance ...), environment , etc.
- Source : The full list of (182) standard items from the global Kantar TGI survey (new items on technology)
- Usage :
 - Analysis of the 182 items
 - Average score on 10 dimensions (factoranalysis)
 - Possibility to create proper typologies or to recreate international segmentations based on TGI

“Je suis végétarien”

“J’aime manger la cuisine étrangère “

“Geld is de beste maatstaf voor succes “

“C’est important qu’une entreprise agisse de façon éthique “

“Ik maak me geen zorgen over de toekomst”

“Ik beschouw mezelf als een creatief persoon “

“Ik doe bewuste inspanningen om te recyclen “

“Un homme, un vrai, ne pleure pas”

People

Socio-cultural attitudes (TGI): 10 Dimensions



INFORMATION - INFLUENCE

- 'Bekende mensen beïnvloeden mijn aankoopbeslissingen'...

RESPONSIBILITY - RESPECT

- 'Het is belangrijk dat een bedrijf ethisch handelt'...

TECHNOLOGY - INNOVATION

- 'Ik koop graag nieuwe gadgets en toestellen'...

BEAUTY - APPEARANCE

- 'Schoonheidsproducten helpen me om me een goed gevoel te geven over mezelf'...

AMBITION - ADVENTURE

- 'Ik hou ervan om risico's te nemen'...

OPPORTUNISM - EASE

- 'Ik kijk altijd uit naar speciale aanbiedingen'...

PASSIVITY - CONSERVATISM

- 'Het is alleen de moeite om milieuvriendelijke dingen te doen als ze je geld besparen'...

ETHICS - ENVIRONMENT

- 'Ik ben bereid om meer te betalen voor milieuvriendelijke producten'...

IMPULSE - CARELESSNESS

- 'Met een kredietkaart kan ik de dingen kopen die ik me normaal niet kan permitteren.'...

HEALTH - FOOD

- 'Ik beschouw mijn eetpatroon als zeer gezond'...

People

Leisure activities



- What ? : A description of hobbies and leisure time activities
- Source :
 - Visit / Attendance of 13 events (concerts, happenings, festivals, charity events, trade fairs, sport events, ...)
 - A list of 30 hobbies (trekking, yoga, painting, music, photography, reading, gardening, cooking, travelling,...)
- Usage :
 - Events : frequencies
 - Hobbies : yes/no



People Shopper Typologies

General items on shopping attitudes

*Items with reference to **FMCG***

*Items with reference to **durables***

*Items with reference to **services***



- What ? :
 - A series of +/- 100 items about shopping behaviour : the importance of brands, sensibility to promotions, the value of price, use of coupons, attitude towards ecology, preferred communication channels, the value of personal contact ...
 - Separate lists for FMCG, durables and services
- Usage : Three segmentations created by TNS : FMCG, durables and services

“When I need a new product/service, I compare the offer of a wide variety of suppliers”

“I consciously buy biological and ecological products”

“I take the time to carefully compare different brands”

“I prefer to live from day to day, rather than planning my purchases”

“There are big price-differences between supermarkets”

“There a big price differences between bank services”

“Brand names are a warranty for good quality”

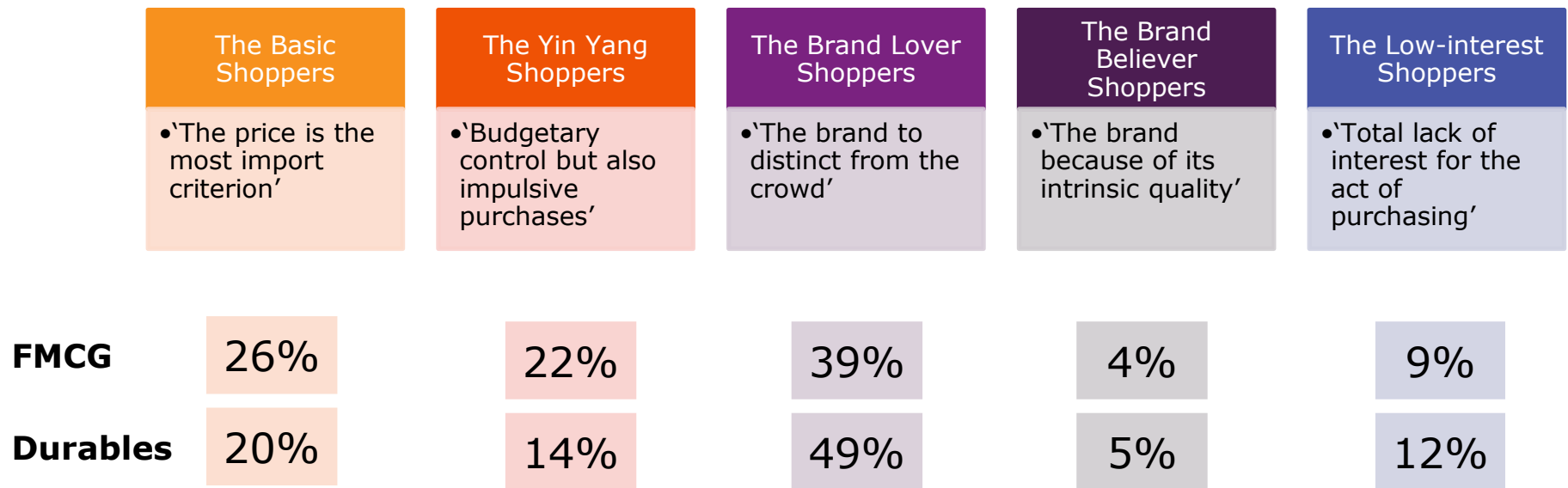
“When buying food, I pay more attention to the brand than to the price”

“I always look for special deals”

People Shopper Typology FMCG & Durables



TNS Shopper Segmentation – FMCG & DURABLES



People Shopper Typology Services

TNS Shopper Segmentation – SERVICES



The Security Seekers (23%)

- 'Get the most out of the known world'

The Added Value Seekers (11%)

- 'Have the best to be the best'

The Challenge Seekers (37%)

- 'Challenged by others to reach their own passions'

The Balance Seekers (14%)

- 'Balanced living thanks to trustworthy relationships'

The Convenience Seekers (15%)

- 'Take it easy'

People Innovation segmentation



SOCIAL LOGIC

Segment Profile
of target group

Selectives
28%



Pioneers
12%



Cautious
30%



Rejectors
14%



Shopaholics
16%



MARKET LOGIC

People

The Digital Consumer

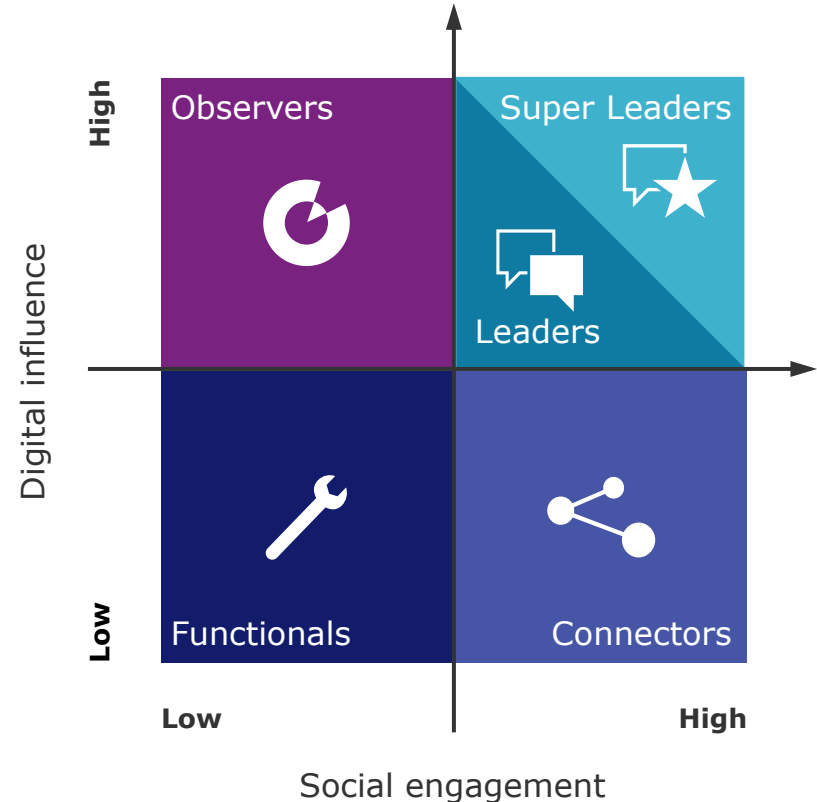
To what extent should I focus on digital, rather than other channels?

The answer to this question is based on the level of influence digital channels hold, which grows with improving *access*. The more devices or bandwidth a consumer has, the more time they will spend online and the more influential the medium becomes

Where should this focus be? On social and earned media or owned and paid?

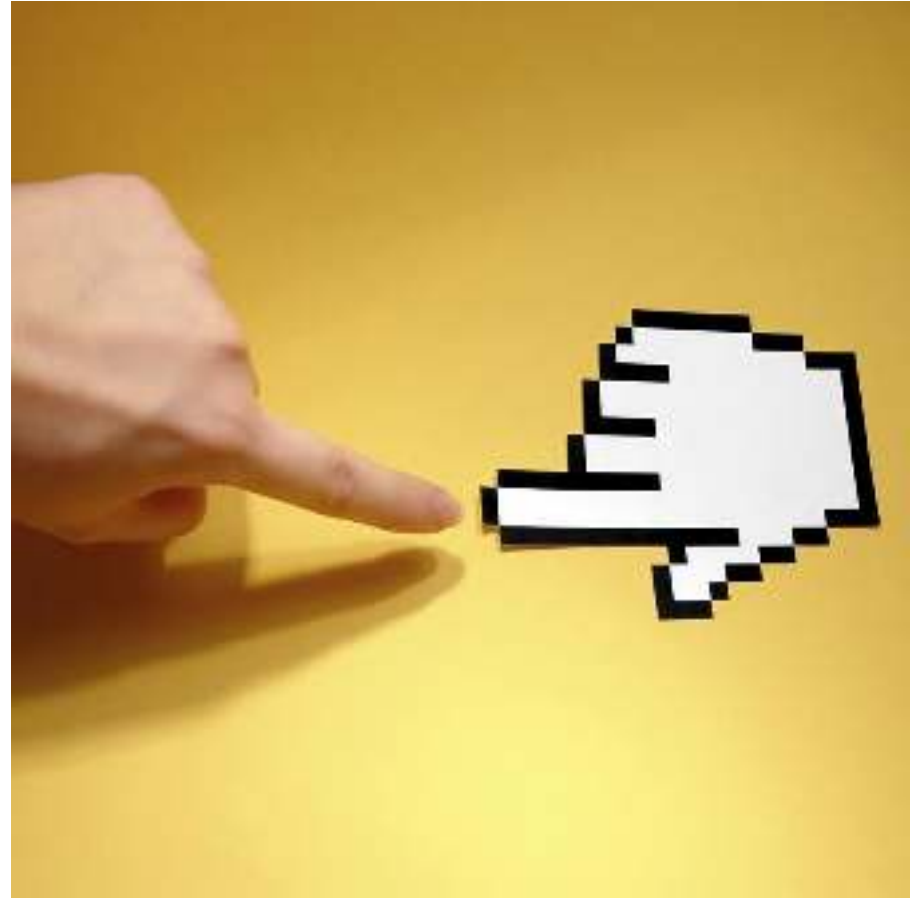
The answer to this questions is less clear cut as it is more closely linked to *attitudes* than *access*, wherever consumers have a stronger attachment to social channels they will play a more important role.

We use a simple framework to describe this shifting dynamic across markets, categories and consumers



4

What does the
Brand Media Monitor
tell us about Media?



Media 360° - 3D

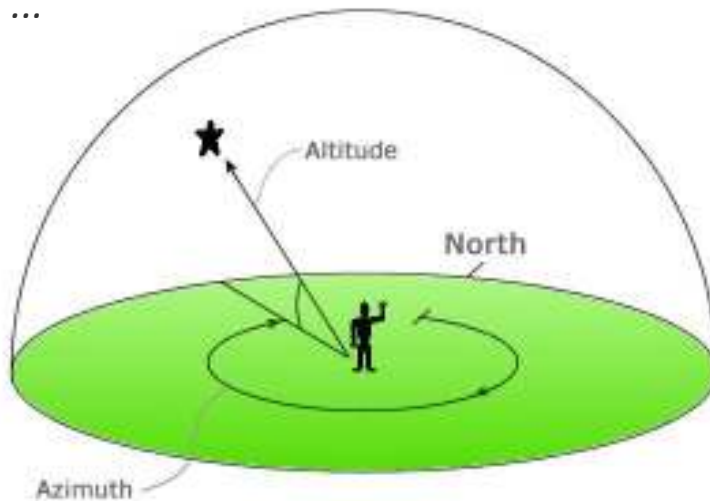


“ 360 °, channel planning, touchpoints...”

Mc Luhan had gelijk : het medium is de boodschap geworden.

De BMM heeft op een spectaculaire wijze zijn scoop op de communicatiemiddelen verbreed :

above, below, en alle verdiepingen daartussen ...



Egalement avec le maintien de sa perspective 3D :

En quête du type média adapté ou du mediamix le plus complémentaire?

De la chaîne ou du titre le plus pertinent ?

Ou du contexte éditorial le plus adéquat ?

Le BMM soutient à la fois le mediaplanning stratégique, tactique et contextuel.

Media

Strategical – Media types



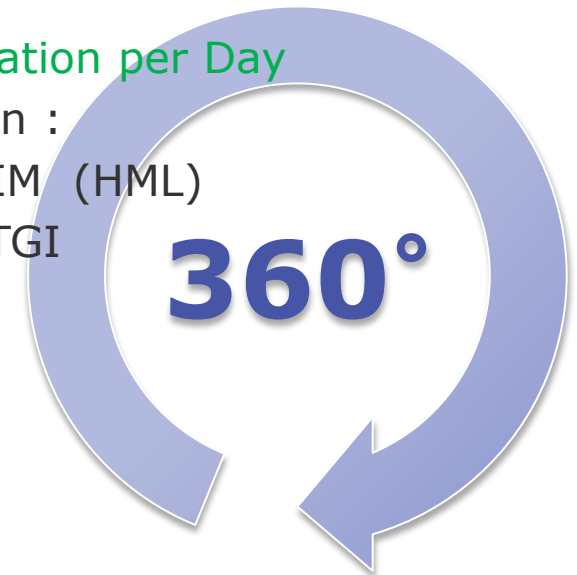
General use of media types (19)

■ Above :

- Dailies
- General Magazines
- Specialised Magazines
- Free TV Channels
- Pay TV
- Online Video / videostreaming
- Radio
- Audio streaming
- Websites
- Search engines
- Apps
- e-mail
- Social media
- Cinema
- Free regional press
- Unaddressed Mail (folders)
- Direct Mail
- Direct e-mail
- Outdoor (affichage)

■ Parameters :

- Total Usage
- Frequency
- Duration
- Average Duration per Day
- Segmentation :
 - Density CIM (HML)
 - Quintiles TGI



Media

Strategical – Advertising Touchpoints



■ 55 below / above advertising touchpoints including

- Sponsoring
- Advertorials
- Print inserts
- Brand events
- Brand fees on social media
- Search ads
- Coupons
- Online video of a brand
- Branded apps
- Recommendations
- Telemarketing
- Pop-up stores
- Gadgets
- Free trials ...

■ Parameters :

- Total Usage
- Frequency



Media

Tactical – Media brands



■ + 500 Titles (filter per language)

- 16 dailies (8 Fr, 8 NI) + 18 supplements (5 Fr, 13 NI) + digital versions
- 93 magazines (43 Fr, 50 NI) + digital versions
- 65 TV stations (31 Fr, 34 NI)
- 26 view on demand services (10 Fr, 16NI)
- 25 radio stations (15 Fr, 10 NI)
- 13 audio streaming services
- 195 media-sites (100 Fr, 95 NI)
- 41 other websites (22 Fr, 19 NL)
- 8 instant messaging providers
- 4 search engines
- 13 social online media
- 4 regional free papers (2Fr, 2 NI)
- 20 types of billboards

■ Information

- Reach (all vs non)
- Frequency (regular vs irregular)
- Preference (TV, radio)

Media

Context – Content

Qualitative questions (preferences / usage)



Dailies

Types of info
(17)

Magazines

Types of info
(17)

TV

Types of movies
(15)

Program types
(15)

Digital TV
Services (17)

Radio

Program types
(14)

Music genres
(15)

Free Regional Press

Types of Info
(13)

Mail

(Direct / unaddressed)

Product
Categories (13)

Internet: Search/Info

Themes (18)
Activities (24)

Internet : Communicate

Activities (19)

Internet: Buy

Purchases on
the Internet
(14)

Activities (9)
Shopping apps
(15)

Apps

Type of apps
(17)

Media Equipment & Devices



TV :

- number of TV-sets / cable TV / satellite dish / digital decoder / PVR / Smart-tv / videorecorder / DVD / Blu-Ray / game console / direct internet access / Apple TV

Radio :

- number of radiosets / Wifi / DAB / MP3 or Ipod / streaming radio

Internet :

- number of desktop PC, laptop PC, tablets, smartphones, smartwatch

Mailbox Media :

- anti-advertising sticker

Gameconsoles (with multimedia):

- portable vs non portable

Mobile :

- GSM / smartphone / tablet / Android vs iOS vs Windows

Media

Access points



Dailies :

- paper / website on PC / website on mobile / app

Magazines :

- paper / website on PC / website on mobile / app

TV :

- PC / hometheater or mediacenter / GSM or smartphone / TV-set / iPad or tablet / game console or other electronical device / smartwatch

Radio :

- PC / hometheater or mediacenter / GSM or smartphone / iPad or tablet / game console / mp3-player / podcasts / streaming radio / auto radio / smartwatch

Internet :

- Devices : PC / GSM or smartphone or iPhone / smart or connected TV / iPad or tablet / game console / smartwatch / other electronical device
- Locations : home / work / school / outdoor / library or cybercafé / elsewhere

Brand Media Monitor IX

Edition 2018-2020

Access:

Different possibilities according to client's priorities :

- Access to data in the Galileo software (standard B-band for media agencies)
- Brand Report / Sector Report (Excel or PPT)
- Media Report (tactical or strategical) (Excel)
- Ad-hoc analyses

Contact:

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