



Danger!

Slow moving brands ahead



Rosie Hawkins

Global Head of Brand & Communication
TNS

It's hard for brands to create competitive advantage. Growth can be elusive and today's complex and fragmented environment makes it difficult to judge whether marketing strategies are working. To avoid getting stuck in the slow lane, you need forward-looking insights to support agile decision making.

The good news is that the drivers of change are also the drivers of opportunity. The technological advances that are behind so much of this changing landscape also provide the foundations for new ways of uncovering insights.

By fully embracing new data streams we can turn existing processes upside down. In tracking, social media and search data can form the basis of a predictive spine that delivers results months ahead of survey data. That means you can anticipate changes to your brand equity in time to actually do something about it.

That same social media data can be explored to evaluate campaign and product launches, providing rich learnings on how to better plan and execute campaigns.

Using mobile enables us to ask people closer to the moment what they have done, bought or seen, delivering a more granular view of consumer behaviour. We're able to delve into those all-important occasions to better understand the context in which decisions are being made.

Add this to mobile's ability to access hard to reach communities or demographics traditionally underrepresented in research – and we have a marked improvement in data accuracy.

All of these advances come together to form a totally new way of tracking. In the following pages, we'll explain how this can help your brand to overtake the competition.

Brand tracking is changing and we're driving this change.

Rosie Hawkins

+44 203 130 7319

[@RosieHawkinsW](#)

rosie.hawkins@tnsglobal.com

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Contents

Attention! Early insights via social media

Create competitive advantage	Page 05
Advanced warning of opportunities and risks	Page 06
Predictive equity in action: the UK automotive sector	Page 07
Optimise campaign launches	Page 08
Social campaign evaluation in action: Super Bowl vs. Oscars	Page 09

Warning! Missed opportunities

Uncover new growth opportunities	Page 11
Situational equity in action: Cooking in Nigeria	Page 12

Caution! Hazardous waste

Improve your media ROI	Page 14
Separate the effect of creative from the media	Page 15
Media evaluation in action: Skincare in Asia	Page 16
Manage your touchpoints	Page 17
Touchpoint management in action: German coffee brands	Page 18

Avoid delays! Take the fast lane to insights

Improve accuracy and quality in your surveys	Page 20
Shorter smarter surveys in action: Skincare and mobile phones	Page 21

Get in touch	Page 22
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Attention!

Early insights via social media

How do you get ahead of the curve and create a competitive advantage for your brand?

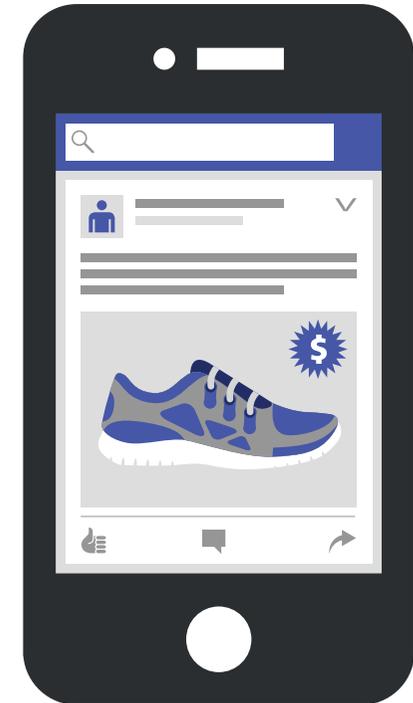


For as long as people have been talking about big data, there's been the promise of using social media and search content to provide an instant, real-time snapshot of what consumers are saying, thinking and feeling.

The potential is obvious: you've got a full range of unfiltered opinions about your brand that respond to events as they happen. You get insights that are inherently actionable, in a timeframe that lets you act. And as the data already exists, surely this would be cheaper as well as faster?

But the reality is different. Big data proved too big. Until now.

We've developed a way of cleaning and aggregating social and search data to isolate the content that's relevant to your brand, category or campaign. Whether used in isolation or blended with survey data, our new approaches don't just give you new insights, faster. They put you ahead of the competition.



How do you get advance warning of opportunities or potential risks for your brands?



In a perfect world you would not ask market researchers what your brand equity was one or two months ago. Nor would you only speak to those consumers who were willing to answer your survey. In a perfect world you would get a full picture of what is happening to your brand right now.

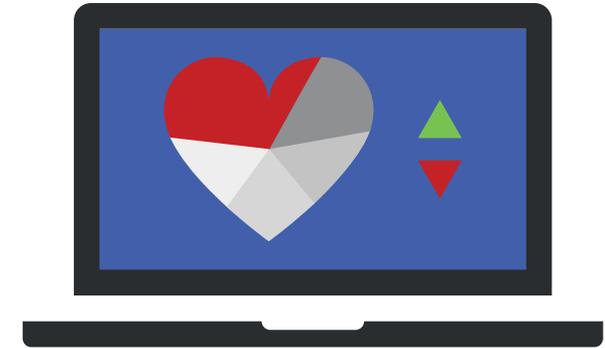
Well, welcome to that perfect world.

We integrate cleaned, aggregated and relevant social and search data with historic studies to identify the signals that signpost shifts in brand equity and mix it with contextual understanding. We do not use machines to do the thinking for us, but intelligent human analysis to turn big data into something meaningful that can predict the future.

It's called predictive equity and it gives you a full and measurable analysis of how your brand will be perceived before you act.

So does it work? To test it we looked at over 100 brands across all types of categories and what we discovered was astonishing. Our predictive results are 90% accurate – and we are able to deliver insight two to four weeks before the survey picks up the shift and months before that survey data is available.

Now we can see what your consumers will do before they do it, giving you time to do something about it and stay ahead of the competition.



Want more?

Learn more by reading: **Marketers: the future is ready for you now**, which can be downloaded free at www.tnsglobal.com or call your TNS contact.

Predictive equity in action:

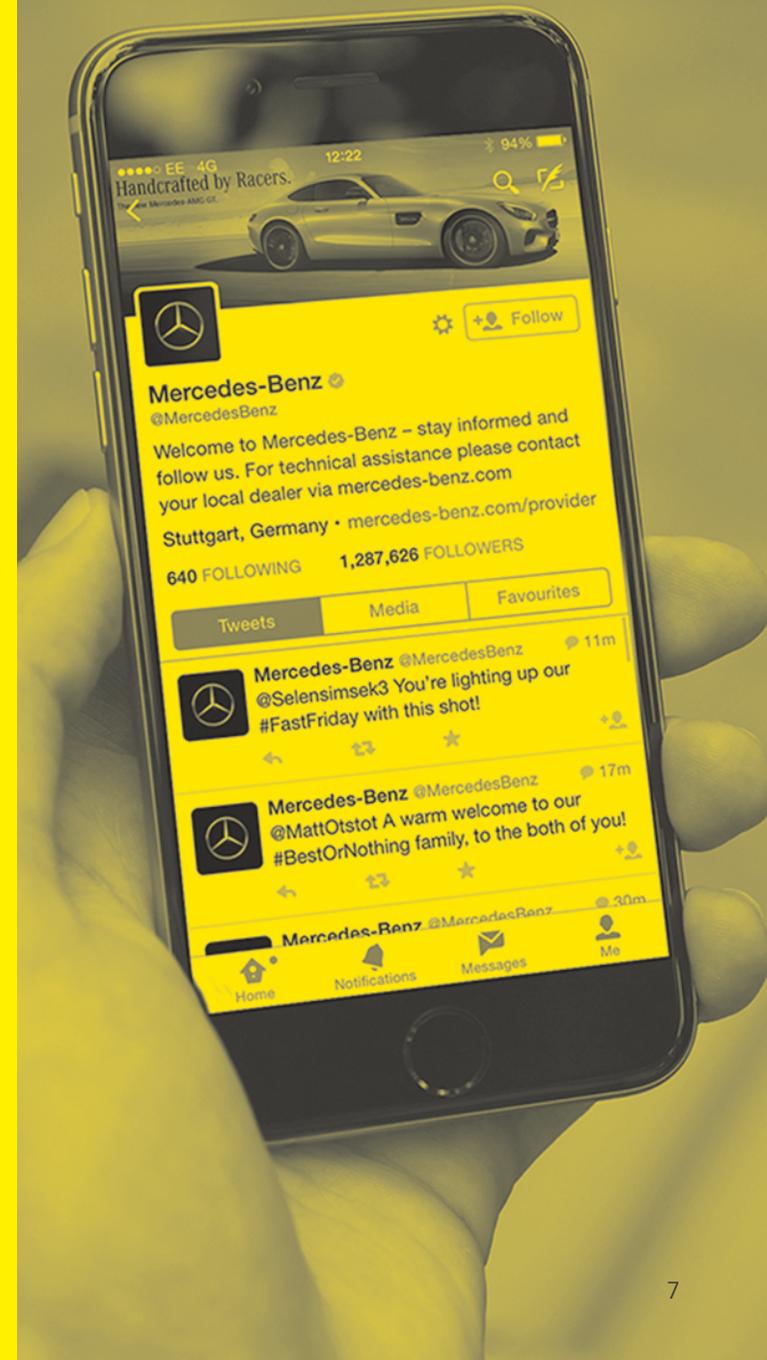
The UK automotive sector

In order to test the power of our predictive tracking approach we looked at the UK car market to see if our predictions would match historical equity and sales data.

We looked at the country's 21 most established brands, which included luxury vehicles like Mercedes-Benz and the more mainstream brands such as Vauxhall. By combining our social signals – in this case Twitter data – with brand mentions in the print media, we were looking to prove that we could have identified brand equity movement before it happened.

We looked back at 17 months between March 2012 and August 2013 and built a model that was able to predict pretty much to the letter the brand equity for each manufacturer. But let's be honest, everyone knows that brand equity in the motoring sector does not shift too much. A far more challenging scenario was predicting sales figures over those months. Could we provide an analysis of social and search that could tell these manufacturers their likely number of sales over those months? If we could, then imagine the effect that would have on their capacity planning and media spend.

The simple answer was yes. We were able to do so in a matter of weeks and with greater accuracy. Traditional methods resulted in 72% accuracy, but our new approach ramped this up to 95%.



How can I assess and optimise campaign launches in a timely manner?

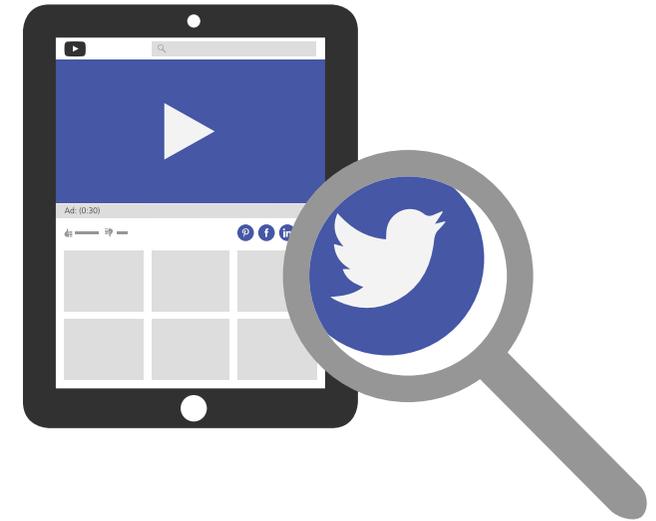


What does great marketing look like in the social media age? Why does one piece of activity set social platforms alight when another barely resonates? And what does it really mean for the brand when it does?

We've been exploring exactly what effective marketing looks like. We've drawn together methods informed by mathematics, physics and sociology to transform that messy, unstructured and vast amount of data that social delivers into patterns that can be consumed and easily understood.

That's how we can show exactly what makes a campaign effective on social media and what benefit that delivers to brands.

Social media provides an early read on how a campaign is performing. By integrating our understanding with other campaign evaluation metrics, we can give you an even fuller picture of the long-term contribution a campaign will make to your brand equity.



Want more?

Learn more by reading: **Why real-time marketers need a better radar**, which can be downloaded free at www.tnsglobal.com or call your TNS contact.

Social campaign evaluation in action: Super Bowl vs. Oscars

You needed deep pockets to run a TV ad during 2015's Super Bowl. The Oscars were not cheap either. A 30-second spot during the American football showcase would have set you back \$4.5bn, while an ad in a break from the Hollywood extravaganza went for about half that.

A significant reason that brands like Budweiser and Dove spent that money was to generate social media engagement during a high profile event that can deliver significant reach. So what kind of bang did they get for their buck?

The maps and footprints from our Twitter analysis show the Budweiser 'Lost Dog' ad scored the highest number of mentions (26%). But while the brand generated massive amplification, our research shows that much of this was around the cute novelty of the ad, rather than sustained engagement. While it might be remembered, it will not drive long-term interest in the brand.

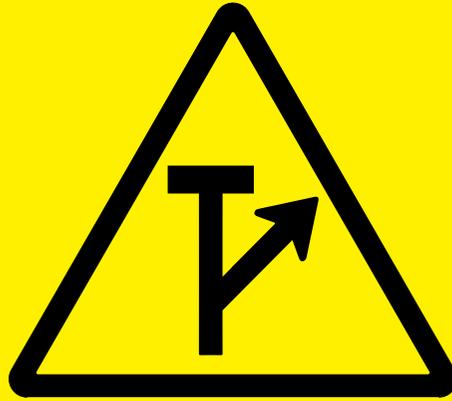
Want more?

Learn more by reading: **Super Bowl vs. Oscars: social media's winners revealed**, which can be downloaded free at www.tnsglobal.com or call your TNS contact.

Over at the Oscars, Dove based its entire strategy around social media – focussing on the commentary around how women look on the red carpet. This aligned perfectly with its long running Real Beauty campaign. Twitter analysis showed that this triggered responses from a range of influencers who shared or added to Dove's commentary on their own networks, resulting in greater and more authentic brand engagement.

The campaign execution around both events took different forms, and our ability to track and analyse it revealed quickly what was viewed as authentic and what was not.





Warning!
Missed opportunities

How do you uncover new opportunities to grow your brand?



Decisions are always contextual – driven by specific circumstances such as the time of day, your mood, where you are, the people you are with and of course, what is available to you.

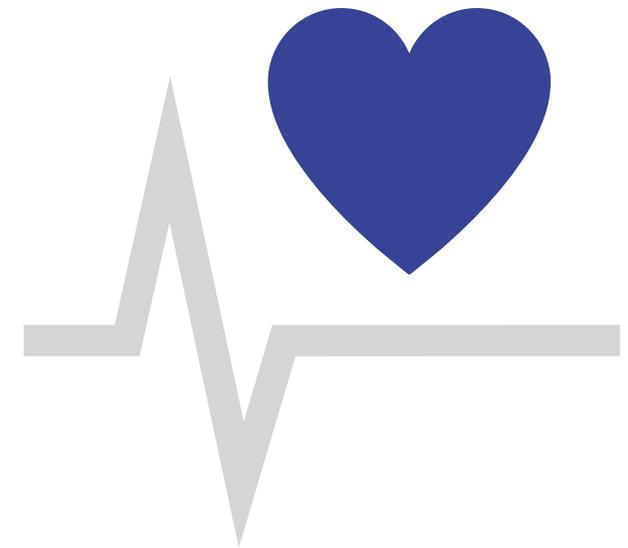
As a result, a brand's equity will fluctuate across different situations and its competitive set might also vary. In the morning, you may find that a specific brand of coffee is the only option you consider. A coffee shop is the most convenient place to go on your commute to work and you know that nothing but a hit of caffeine is going to set you up for the day.

But later on in the day, you may choose between a cup of coffee, an energy drink or maybe a soft drink to give you a boost. By talking to consumers as they go about their day you learn how context influences decisions. We call this situational equity.

Situational equity is all about understanding the moment consumers live in – what specific choices they are making and the dynamics of those individual decisions.

By using mobile technology to deliver short surveys closer to the moment, we are able to capture those interactions that people hardly think about – but which can unlock opportunities for your brand. This may be about identifying a part of the day that is currently under-leveraged, or a messaging or promotional opportunity that would increase the chances of your brand being chosen.

It's the granularity of the information that allows marketers to fine-tune strategies so their brands have the highest likelihood of being chosen in particular situations.



Want more?

Learn more by reading: **Why brands need to know their situational equity**, which can be downloaded free at www.tnsglobal.com or call your TNS contact.

Situational equity in action:

Cooking in Nigeria – to season or not to season

A lot of behaviour is automatic and it can be hard to accurately recall precisely why we've made a particular decision. This is very true of cooking and specifically adding seasoning while cooking.

To explore this further, we asked 2000 people in eight African countries across four days to complete a mobile diary of their cooking occasions. We asked them to tell us about all of the things they cook throughout the day, with a specific focus on the seasoning – what seasoning they used; how much was used; where the food was cooked and what it was for. Importantly, we asked what seasoning they prefer to use in a specific occasion. Over the period we captured information on 2598 individual cooking occasions and developed a deep understanding of the equity of different brands at different times of the day.

We found that in one out of 10 cooking occasions, consumers are not actually using their favourite seasoning. Boullion, for instance, is a favourite. However, in the evening it accounted for just 5.9% of share, but recorded an equity of 7.7%. The implication was clear: despite boullion being a favourite for the evening meal, people were not using it. The question now, was why not?

Some of the reasons involved competitors offering flavouring that was similar to boullion and consumers simply having run out. Affordability was not an issue, but a lack of promotional activity did stop people from buying boullion. From this we could see quickly that point of sale promotions reminding people to stock up would increase purchase frequency. There was also an issue around in-store availability, highlighting a need to review distribution networks and in-store visibility.

And let's remember – we discovered all of this in a matter of days, giving precise information to unlock brand growth.





Caution!

Hazardous waste

How do you improve the ROI of your media spend?



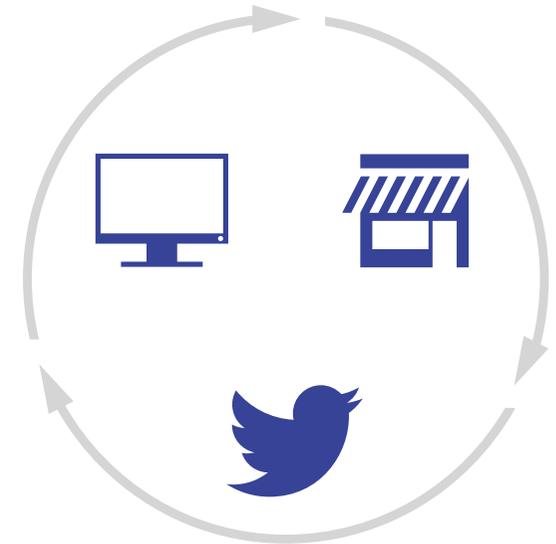
Reaching the desired audience is always a bit of a challenge, particularly in an ever-changing media landscape.

Hyper-connected consumers are increasingly savvy and demand more of the brands they interact with, which is why brands are becoming more audience-centric in their approach to advertising. To complicate matters further, when we look at online behaviour across multiple consumer groups, every demographic is different.

This makes it more difficult to reach some consumers than others. And all that makes perfect campaign delivery an ongoing challenge.

The best product in the world, with the best ad in the world, won't sell if it isn't seen by a receptive audience. So maybe the fault of a failed campaign lies not with the creative, the brand, or product, but with the media plan. In a hugely diverse media environment, successful targeting is increasingly essential.

Our approach identifies the target market most receptive to your message, the touchpoints that will grow your brand equity and the media channels that will work best to amplify your message.



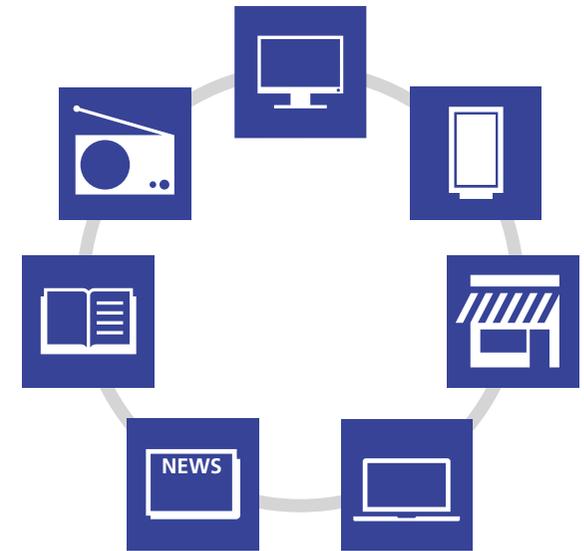
How do you discover if your ad works because of the creative or its media placement?



Campaign success comes from the combined power of the right creative with the right media. If response to a campaign isn't as expected, then you need to work out whether it is the creative or the media that requires attention.

Knowing this information allows you to ensure your media spend is allocated to the right places at the right time. It works by linking your brand and ad metrics with consumers' actual or estimated exposure to a campaign. We can then evaluate the campaign's performance and model it against different budget allocations.

You'll then know how to tweak your creative and target your media spend in order to produce the most successful outcome.



Want more?

Learn more by reading: **Selling to the Converted?**, which can be downloaded free at www.tnsglobal.com or call your TNS contact.

Media evaluation in action:

International skincare and luxury beauty brand

One of our clients – a global prestige beauty brand – was facing increasing competition from premium mass-market entrants in a high-growth Asian market and asked us to evaluate and provide recommendations around its creative and media mix.

The campaign launched with TV, print and online activity for an anti-ageing line. It achieved outstanding recognition of 97%. However, this was not converting into purchase due to a lack of more detailed understanding of the product benefits. We also found that the digital assets were underutilised. However, when they were seen, these assets were able to drive conversion. We therefore recommended that TV spend and print be reduced to free up budget for increased digital spend.

With a second period of activity, the client acted on this advice for its skin pigmentation line. The TV advertising still contributed to good reach, but again, not conversion. Our analysis of the increased use of digital (especially mobile) showed the impact on brand metrics had improved significantly. There was, however, still work to do. We again recommended a decrease in TV and print spend, adjustments to the creative and a further increase in digital.

This saw the brand's KPI's communicated much more effectively to the target audience and the media mix vastly improved. The result was an increase in sales and the brand taking share from the category leader.



How do you know which touchpoints you should invest in?



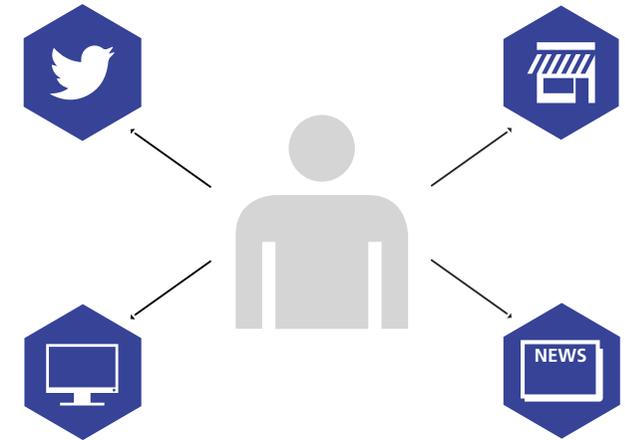
Managing the complexity and number of touchpoints across the digital and physical worlds is consistently mentioned as a key challenge by marketers and ecommerce specialists. Brands work in an increasingly complex media landscape, encompassing traditional channels such as print and TV and a growing number of digital platforms and associated earned media.

That means you're no longer in control of your brand. You can't confine the experience just to advertising or marketing campaigns, as there's a whole world out there tweeting, pinning and posting away.

Our approach measures the reach of your individual brand touchpoints; the impact on brand equity in terms of experience and quality and how your competitors' touchpoints impact your brand. This includes those that you've paid for (like advertising and sponsorship for instance); those that are owned (such as in store, and website); and any that you earn (social chatter and word of mouth).

This information maps the total touchpoint landscape for the category. It includes your brand and competitors and enables you to increase your impact by putting the right level of investment behind the most influential touchpoints.

Get in touch with your TNS contact for more information.



Touchpoint management in action:

German coffee brands

The German coffee market is highly competitive and fast evolving due to the success of espresso and capsules.

We spoke to 1,500 coffee drinkers to understand how they experience the coffee category across 43 different touchpoints during March 2014.

The challenge was to identify those touchpoints that worked for a client's brand and to see how that compared to the competition. It provided a 360-degree view of brand performance over all types of touchpoints, measuring the reach and impact of each.

The market leader had 13.5% share of the category. Our study was designed to explore how people experienced the brand and how these individual experiences contributed to the overall brand equity.

Unsurprisingly, supermarket shelves were a major touchpoint, but the market leader lagged behind the competition. There was an opportunity for the brand to increase its visibility in store. We also discovered that print ads significantly outperformed the brand's email newsletter. This revealed another opportunity: either improve the newsletter or consider investing that spend elsewhere to create more impact.

While the TV advertising was relatively successful, it was supported by a high level of spend. Competitors were delivering more successful TV experience with lower spend, questioning the efficiency of the market leader's activity.

With these sorts of learnings, we are able to advise our clients on how to most efficiently and effectively optimise their spend across a wide variety of touchpoints.





Avoid delays!

Take fast lane to insights

How do you improve the accuracy and quality of your surveys?



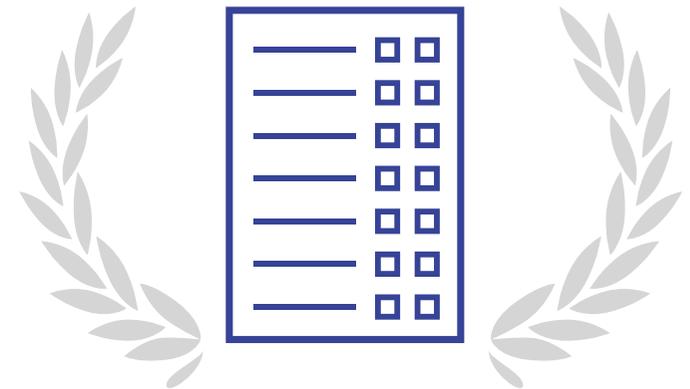
A tracking study is often one of the higher ticket items in the research budget. And while the information that tracking studies deliver is valuable – and the intent sound – there is a growing need to get more accurate data into the hands of marketers quickly, in order to help them make better and faster decisions.

It's why we use shorter smarter surveys to drive up our data quality and streamline the process. We focus on what we call The 3 Rs: Relevance, Redundancy and Respondent validity. Relevance is about only asking the questions that are relevant

to each respondent so they can bypass questions that are irrelevant. Redundancy involves removing questions that are inter-correlated and measuring the same thing. While respondent validity means we only ask questions that relate to actual behaviour – the metrics that matter.

By reducing questionnaire length, we also ensure that surveys are device agnostic. And the ability to administer mobile surveys enables us to access hard to reach communities or demographics traditionally underrepresented in research. This delivers a marked improvement in data accuracy.

Don't let research slow you down. Better data, faster can only help to drive better decisions.



Want more?

Learn more by reading: **The trouble with tracking** and **shorter, more predictive surveys** which can be downloaded free at www.tnsglobal.com or call your TNS contact.

Shorter, smarter surveys in action:

Skincare and mobile phones

Let's look at two clients enjoying the benefits of shorter, more actionable tracking surveys.

The first is a mobile phone brand whose products are distributed across 25 countries.

Its tracking study was huge and was not producing timely and actionable information. Among the actions we undertook were a simplification of the language; the removal of repetitive questions; a review of response patterns and the identification of questions that did not inform business decisions. We also looked at the parts of the survey that would be better suited to gamification. Among the benefits were an estimated \$2m in cost savings and a 44% reduction in the time it took to complete the survey.

The second is for a skincare company with 32 brands across 150 countries.

We were asked to improve and enhance its tracking study. We recommended it reduce the length of its already focused survey by seven minutes, removing invalid and irrelevant questions. We also suggested we only measure the brands that were relevant to individual consumers and while this resulted in cutting the brand list down by over 80%, we were still able to capture 80% of market share. The result was improved accuracy as each measure linked to actual purchase behaviour.



Get in touch

We'd love to take you through our thinking in more detail and discuss how we can help you. For more information please contact:

Rosie Hawkins

Global Head of Brand & Communication
+44 203 130 7319

[@RosieHawkinsW](#)

rosie.hawkins@tnsglobal.com



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About TNS

TNS advises clients on specific growth strategies around new market entry, innovation, brand switching and customer strategies, based on long-established expertise and market-leading solutions. With a presence in over 80 countries, TNS has more conversations with the world's consumers than anyone else and understands individual human behaviours and attitudes across every cultural, economic and political region of the world.

TNS is part of Kantar, the data investment management division of WPP and one of the world's largest insight, information and consultancy groups.