GfK Austria – Event

"Your digital journey with GfK"

21. November 2018

GfK Event

GfK

From a traditional market research
company to a trusted provider
of tech-enabled data analytics

Lifestyles, business models and entire industries are

transforming at a rapid pace

This comes with
new questions
and requirements
for all of us

We too – as MR company – are facing a dramatic value shift: Companies today require easy **access to analytics**, **technology and intelligence**
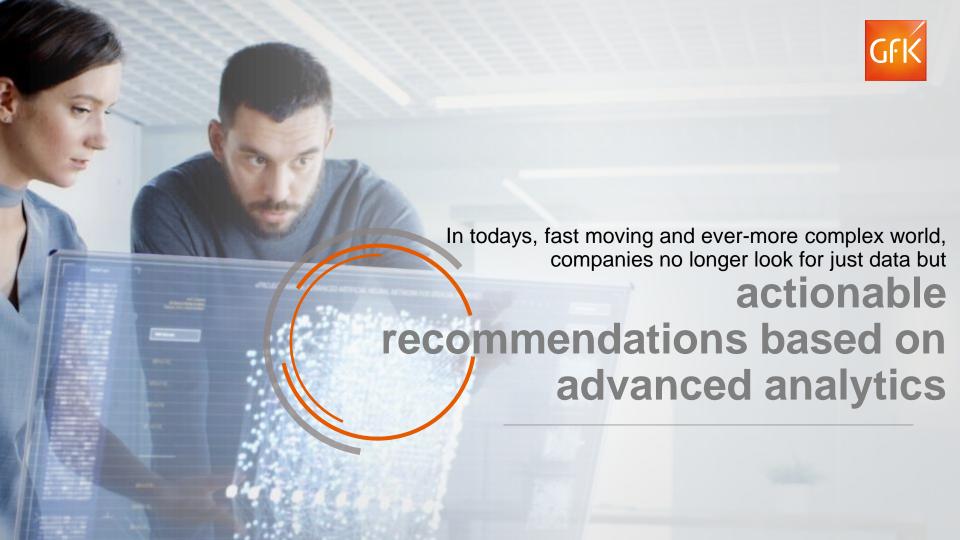
New expectations

- Fast and cost efficient
- Smart and user friendly

New beliefs

- Trust behavioural data
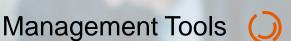- End-to-end platforms - based on advanced analytics

Responding to our clients needs, we are

transforming from a traditional market research company to...

... a trusted provider of ...

PRESCRIPTIVE DATA ANALYTICS

In todays, fast moving and ever-more complex world, companies no longer look for just data but

actionable recommendations based on advanced analytics

Market Insights

Based on POS Tracking
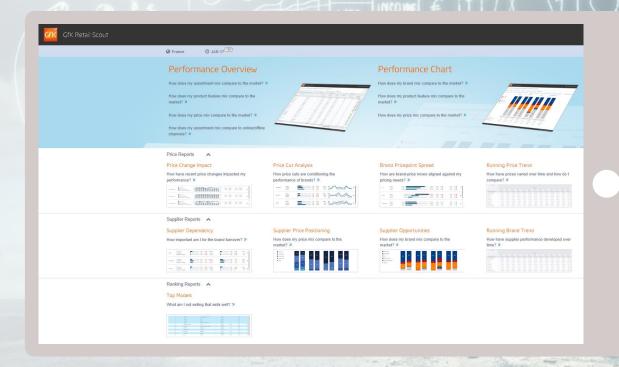
GfK

Analytic Tools

Performance Tracking

Market Insights

Management Tools

Strategic Approach

Landing Page with overview of all reporting modules
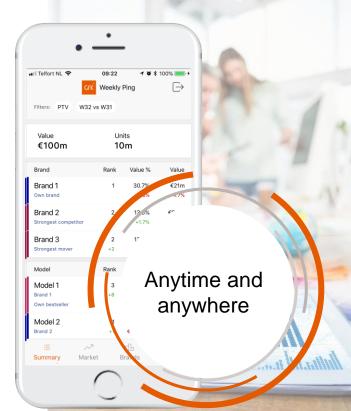## GfK Retail Scout, Market Insights

GfK Retail Scout

France · JAN 17

Performance Overview
How does my assortment mix compare to the market? »

How does my product feature mix compare to the market? »

How does my price mix compare to the market? »

How does my assortment mix compare to online/offline channels? »

Performance Chart
How does my brand mix compare to the market? »

How does my product feature mix compare to the market? »

How does my price mix compare to the market? »

Price Reports

Price Change Impact
How have recent price changes impacted my performance? »

Price Cut Analysis
How price cuts are conditioning the performance of brands? »

Brand Pricepoint Spread
How are brand-price mixes aligned against my pricing needs? »

Running Price Trend
How have prices varied over time and how do I compare? »

Supplier Reports

Supplier Dependency
How important am I for the brand turnover? »

Supplier Price Positioning
How does my price mix compare to the market? »

Supplier Opportunities
How does my brand mix compare to the market? »

Running Brand Trend
How have supplier performance developed over time? »

Ranking Reports

Top Models
What am I not selling that sells well? »

Analytic Tools

Market Insights: PING

Monitoring your weekly sales in a user-friendly app

GfK

Performance Monitor

Summary | Market | Brands | Models

2 | W45 vs. W46 | Smartphones

	Value	Units
	€115m	356k
	▼ 1.5%	▲ 1.1k

8 You remain the #2 brand +10% Value (SGD) Growth while the market was +15% in W46

Brand	Rank	Value %	Value
Apple Closest competitor	1 ▼ 3	44.1% ▼ 1.4%	
Samsung Own brand	2 -	23.4% ▲ 6.0%	22m
Oppo Fastest mover	9 ▼ 4	13.1% ▼ 7.5%	

Model	Rank	Value	Price
iPhone X 64GB Apple Bestseller New launch	1 New	$10m New	
Galaxy S8 64GB Samsung Own bestseller	2 ▲ 1	$9.5m ▼ 1.4%	$567 ▼ 5%

GfK PING
Weekly sales app for local sales managers

Monitor your sales perfor-mance

- How well did my brand/product perform last week?

- How are my competitors faring?

- How did my/their recent promotion impact sales?

- Actionable answers at fingertips (own brand, closest competitor, fastest mover, key models)

- Always up-to-date with push notifications

- Easy monitoring of own and competitive launch activities

- Deep dive into brand/product details to detect quickly where corrective action is required

Anytime and anywhere

	Telfort NL	09:22	100%
GfK Weekly Ping			

Filters: PTV   W32 vs W31

Value	Units
€100m	10m

Brand	Rank	Value %	Value
Brand 1 Own brand	1	30.7%	€21m
Brand 2 Strongest competitor	2	13.6%	+1.7%
Brand 3 Strongest mover	2	1 +2	

Model	Rank
Model 1 Brand 1 Own bestseller	3 +8
Model 2 Brand 2	

Summary   Market   Brands

Available from 2019 for selected product groups
Screenshots show dummy data
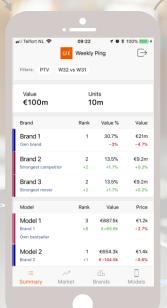
GfK PING
Weekly sales app for local sales managers

Always up-to-date with push notifications

Summary at a glance: my brand, closest competitor, fastest mover, my model

Instant answers on key **market** developments

Sales **brand** performance deep dive: own vs. competition

Easy activity monitoring for my/rival **models** (launches, promotions…)

GfK Performance Cockpit: At-a-glance view of where action needs to be taken
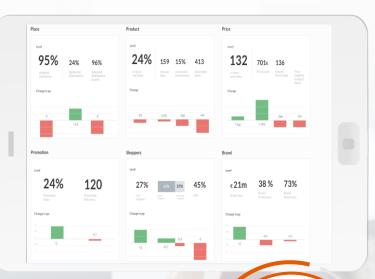
Pilot your business based on solid KPIs

The solution

KBQs

- Online dashboard provides an instantly accessible **360° view** on market and brand performance
- Meaningful KPIs on all sales performance relevant areas support **fast and fact-based decision-making**
- Visual alerting facilitates **intuitive identification** of areas requiring attention

- How is the overall market developing?
- How is my brand's market share?
- Where are we meeting our KPI goals, where not?
- Are there any significant changes in performance ?
- Where do we need to initiate countermeasures?

Management Tools

Demand Forecast
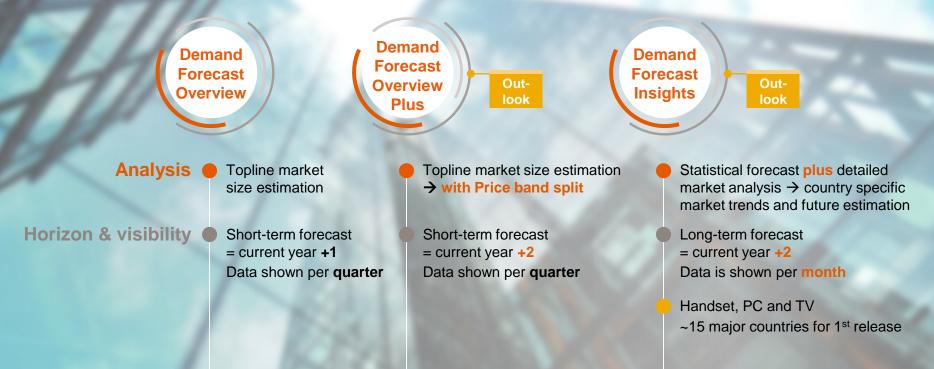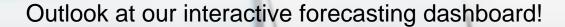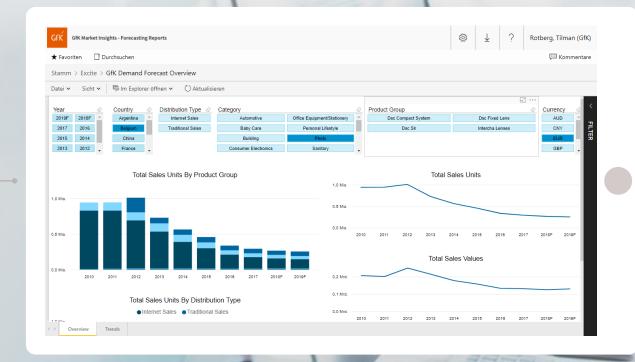
Statistical forecast based on POS historical trend and seasonality

Demand Forecast Overview

Demand Forecast Overview Plus — Out-look

Demand Forecast Insights — Out-look

Analysis
- Topline market size estimation
- Topline market size estimation → **with Price band split**
- Statistical forecast **plus** detailed market analysis → country specific market trends and future estimation

Horizon & visibility
- Short-term forecast = current year **+1** Data shown per **quarter**
- Short-term forecast = current year **+2** Data shown per **quarter**
- Long-term forecast = current year **+2** Data is shown per **month**
- Handset, PC and TV ~15 major countries for 1st release

Outlook at our interactive forecasting dashboard!

Strategic Approach

Rough illustration of GfK landing page

My market performance

Market

Drivers of market performance

Price & Promo Optimizer

Consumer Journey

Marketing Mix Model

Social Media Monitor

Brand Equity Monitor

...

Recommended actions for this week

• Adjusting your promotion price to 95EUR will improve your sales of Product X by 14%

• Reallocating your media spend from Radio to Facebook will allow you to get 15% new & younger consumers.

• Your brand was very negatively per-ceived on social media because the bad buzz created by your lead actor Tom C. on Twitter. You should re-move the creative this immediately

Dashboard

Go beyond
sales data:
Get inside the mind
of your consumer

Consumer Insights

Consumer Journey

How do consumers get from the realization of a need to the point of purchase?

Consumer Landscape

What does the category user look like for your particular category?

Consumer Segmentation

How do these consumers group together for targeting?

Consumer Trends

How are consumers' values, attitudes and lifestyles evolving?

Shopper Trends

How are shoppers' attitudes, omni-channel, behaviors and touchpoint usage evolving?

Consumer Insights

Consumer Journey

Consumer Landscape

Consumer Segmentation

Consumer Trends

Shopper Trends

How do consumers get from the realization of a need to the point of purchase?

What does the category user look like for your particular category?

How do these consumers group together for targeting?
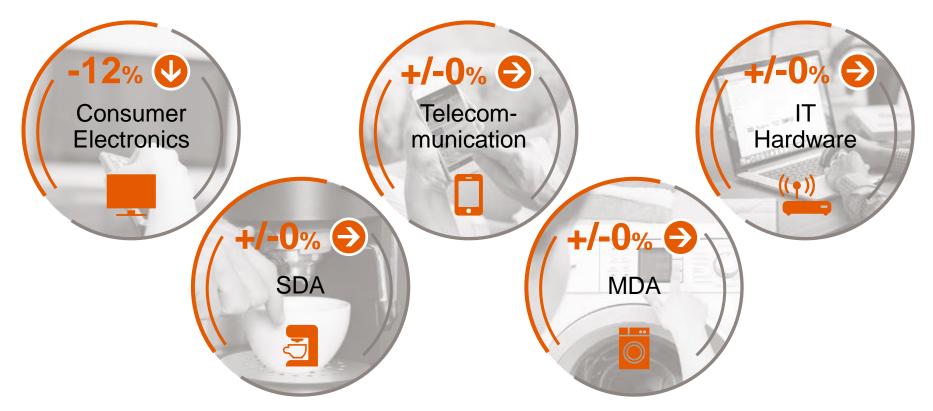
How are consumers' values, attitudes and lifestyles evolving?

How are shoppers' attitudes, omni-channel, behaviors and touchpoint usage evolving?

As the provider of market share currency for Tech and Durables,
we know by heart that there were quite a few of these meetings lately …

-12% ⬇ Consumer Electronics

+/-0% ➡ Telecom-munication

+/-0% ➡ IT Hardware

+/-0% ➡ SDA

+/-0% ➡ MDA

But with **sales data** only, the **WHY** and the **WHO** remains unanswered

———

Ad hoc research is often **costly** and **time-consuming**

Those days are gone with the GfK Consumer Insights Engine our new syndicated solution giving you on-demand access to actionable insights

HOW do we generate these **Insights**?

PoS-calibrated SURVEY data
Up to n=2,000 recent purchasers per category, country and quarter

Online Product REVIEW data
Consumers' real-life feedback on early usage and product aspects

METERING data
Consumers' actual behavior as they search for products and buy online

GfK
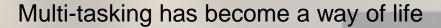
The first analytics solution to connect sales data with market research, behavioral data and artificial intelligence in a single integrated platform

Want to learn more?

Take the
tour

Request a
live demo

Marketing Effectiveness

GfK AdFit Optimizer

Advancing the power of digital advertising

– a world-class approach to digital ad pre-testing

Multi-tasking has become a way of life

77% — of time spent watching TV includes **multi-tasking**

100% — of the time online **involves viewing multiple elements of content** simultaneously

96% — of consumers **multi-task at least sometimes** during commercials and 56% almost all the time

This creates a more difficult environment for ads to break through.

Longitudinal research shows claimed ad recall dropping over the past 10 years.

In the face of these new realities, the challenge for advertisers is clear

The combination
of increasing clutter,
decreasing attention spans
and the rise of multi-tasking means
effective breakthrough is the number one challenge that today's advertising must overcome.

!

Historically, advertising testing systems have not accounted for the challenges of the multi-tasking environment

Traditional pre-testing systems

Exclusively focuses on **cognitive response** to ads

GfK's approach to pre-testing

Also incorporates **pre-cognitive response** which is vital in a multi-tasking environment

This is our **considered reaction to visuals**, involving higher order brain functions. This is what determines whether we continue to attend to things once pre-cognitive factors have attracted our attention.

This is our **instinctive or reflexive reaction to visuals**. It involves lower-order brain functions and is the first thing that comes into play in determining what we attend to.

From this theory emerged GfK's "FIT" construct – our KPIs assess an ad's intrinsic creative power
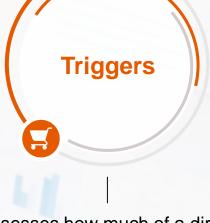
Ad performance is summarized by three key dimensions

Fascinates

Imprints

Triggers

Measures the degree to which an ad will actively grab attention and stand out from the crowd

Evaluates how much of a lasting impression an ad leaves with the consumer

Assesses how much of a direct or indirect response the ad is likely to generate
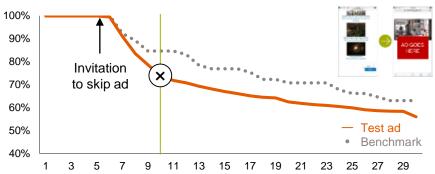
An ad's ability to "Fascinate" (or grab and retain attention) is assessed via the behavioral metrics of "Hook" and "Hold"

Fascinates **I**mprints **T**riggers

For TV & video

HOOK:
% still watching ad after 10 secs

HOLD:
% watched entire ad

For banners

HOOK:
% moving spotlight over ad within 3 secs

HOLD:
Total seconds spotlight is held over ad

Invitation to skip ad

— Test ad
• Benchmark

— Test ad
• Benchmark
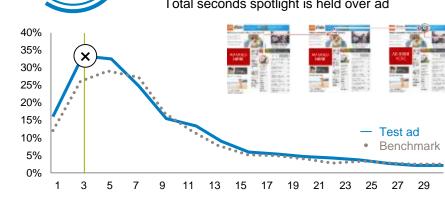
> In daily life, the competing interaction between top-down and bottom-up processes determines humans' attention. In situations in which they passively receive and do not actively search for information, bottom-up attention dominates. In particular, bottom-up attention is the primary mode of operation for low-involvement, incidental ad processing.
>
> *Pieters & Wedel, 2004*

▶ **The forced-exposure designs of some older competitive systems are unable to measure bottom-up attention.**

The key "Imprint" metric measures an ad's positive lasting impression
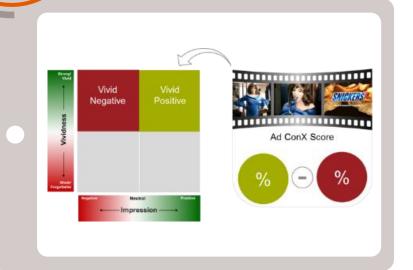
Ad ConX exercise captures the ability of the ad to leave a lasting impression.

The ad's **emotional imprint** is derived via a drag & drop exercise.

Respondents plot memorability and valence of test ads. Generates a validated **Ad ConX Score** supported by additional diagnostics.

The key "Trigger" metrics measure both direct and indirect action

Trigger score captures intent for indirect/direct action as a result of seeing the ad

recommend
to a friend, family or co-worker

talk about
with friends, family or co-workers

search online
for information

click ad
for more information

talk about on
social media

be more likely to
buy

contact
expert/sales rep

use
more often

visit the
website

The ad's ability to generate **direct and indirect action** is derived from top box responses to a battery of nine different action statements.

Talk
- Talk about the brand on social media (e.g., Facebook, Twitter)
- Talk about the brand with friends, family or co-workers
- Recommend the brand to a friend, family or co-worker

Learn
- Search for information about the brand online
- Visit the website for the brand
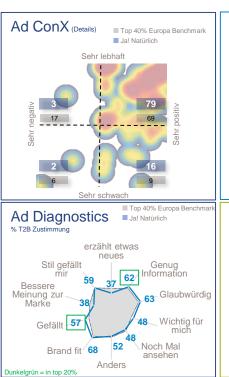- Click on the ad for more information

Do
- Be more likely to buy this product/service
- Use the product/service more often
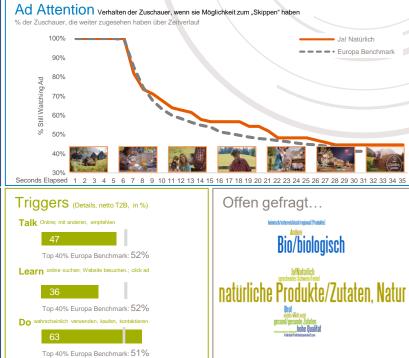- Contact expert about the product/service

An overall **Triggers score** and **"Talk/Learn/Do" profile** are derived from different nets of top box responses to the different action statements.

A standard scorecard deliverable, including an overall "FIT" summary of performance, is automatically generated for each ad

Overall	FIT! Ein Spot, der Aufmerksamkeit erregt, einen Eindruck hinterlässt und Reaktion inspiriert.		
Fascinates	**Hook** % not skipped after :10	**67%**	Top 60%
	Hold % of those who watched the entire ad	**45%**	Top 60%
Imprints	**Brand Recall** Aided	**77%**	Top 20%
	Clear Message TB	**54%**	Top 20%
	Ad ConX Measure of positive lasting impression	**76%**	Top 20%
Triggers	**Net Action** % very/somewhat likely for at least 1 of the actions	**68%**	Top 40%

Ad ConX (Details)

■ Top 40% Europa Benchmark
■ Ja! Natürlich

Sehr lebhaft

Sehr negativ — Sehr positiv

3	79
17	69
2	16
6	9

Sehr schwach

Ad Attention
Verhalten der Zuschauer, wenn sie Möglichkeit zum „Skippen" haben
% der Zuschauer, die weiter zugesehen haben über Zeitverlauf

— Ja! Natürlich
--- Europa Benchmark

% Still Watching Ad (100% → 30%)

Seconds Elapsed 1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 29 30 31 32 33 34 35

Ad Diagnostics
% T2B Zustimmung

■ Top 40% Europa Benchmark
■ Ja! Natürlich

erzählt etwas neues
Stil gefällt mir 59 — 37 — 62 Genug Information
Bessere Meinung zur Marke 38 — 63 Glaubwürdig
Gefällt 57 — 48 Wichtig für mich
Brand fit 68 — 52 — 48 Noch Mal ansehen
Anders

Dunkelgrün = in top 20%

Triggers (Details, netto T2B, in %)

Talk Online; mit anderen, empfehlen
47
Top 40% Europa Benchmark: 52%

Learn online suchen; Website besuchen.; click ad
36
Top 40% Europa Benchmark: 52%

Do wahrscheinlich verwenden, kaufen, kontaktieren
63
Top 40% Europa Benchmark: 51%

Offen gefragt…

We help you find out about the why and what

Stefan, Key Account Manager

what to go for in **next retailer negotiations**

why his **performance** in July was better than in June

Julia, Product Manager

what is a **reasonable price point** for her product

why the **average price** of her product was unexpectedly low last quarter

Marc, Sales Director

what is the **ideal distribution partner** in his new target market

why his **team outperformed** the market

How we may do this

Causal Data

POS Data Analytics

Geo Analytics

Raw Data e.g. on Printed Advertising and Online Pricing
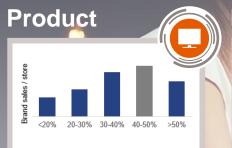
Data Analytics based on unit specific single store sales data

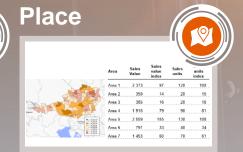Data and analytics services on regional information

Die "Digital journey" hat begonnen.

Wir freuen uns, Sie in diesem neuen spannenden digitalen Zeitalter begleiten zu dürfen.

Profitieren Sie von unserem immer stärker digital ausgerichteten userfreundlichen Portfolio, kombiniert mit unserer langjährigen Marktexpertise über die persönlichen Kontakte.

Herzlichen Dank für Ihre geschätzte Teilnahme an diesem Event