Connected Life 2017

Introduction

Connected Life is the definitive guide to how connectivity is reshaping consumers, connections, content and commerce …

Connected Life represents over 90% of the world's Internet population

57 markets

70,000 consumers

… and quantifies the digital impact around the globe

Looking at a sample of ‘regular internet users’ in 57 markets

North America	
Canada	
USA	

Latam	
Argentina	Colombia
Brazil	Mexico
Chile	Peru

MEA (Middle-East and Africa)	
Egypt	Nigeria
Ghana	Saudi Arabia
Israel	South Africa
Kenya	UAE

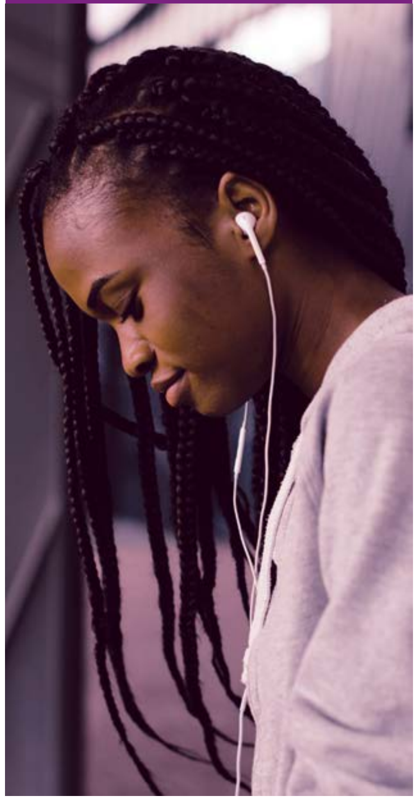
Developed Asia	
Australia	Singapore
Hong Kong	South Korea
Japan	Taiwan
New Zealand	

Emerging Asia	
Cambodia	Mongolia
China	Myanmar
India	Philippines
Indonesia	Thailand
Malaysia	Vietnam

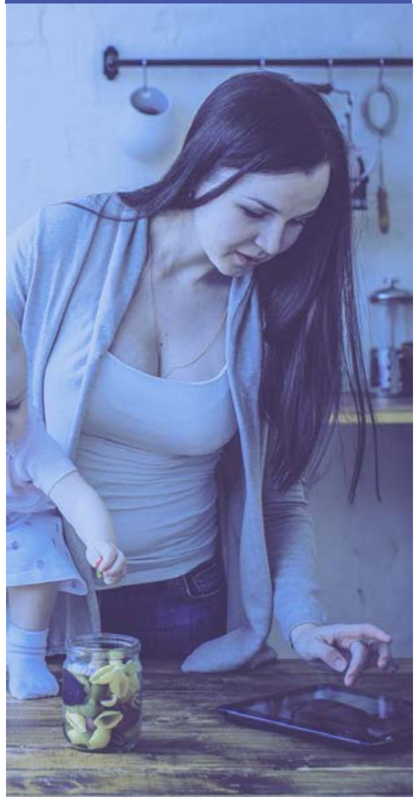
Europe	
Denmark	Greece
Finland	Italy
Ireland	Portugal
Norway	Spain
Sweden	Turkey
Switzerland	Czech Republic
UK	Hungary
Netherlands	Poland
Belgium	Romania
Germany	Russia
Luxembourg	Slovakia
France	Ukraine

Connected Life breaks down the complexity of integrated planning into the four Cs

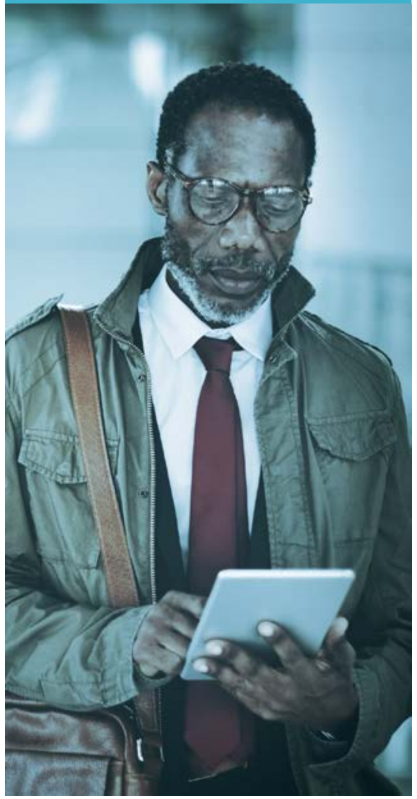
Consumers
How connected
is my target?



Connections
How do I
reach them?



Content
What content needs
and platforms should
I target?



Commerce
How do I activate
against connected
commerce opportunities?

Unpacking key business questions in the connected world

Consumers	Connections	Content	Commerce
How connected is my target?	How do I reach them?	What content needs and platforms should I target?	How do I activate against connected commerce opportunities?

How do I best leverage digital channels to strengthen the relationship with my customers?

Consumers

- What devices do they own, and how does this impact the media landscape?
- How are they impacted by major trends?
- How diverse are their connected behaviours?
- How should I segment and target them?

Connections

- How far has media migrated online?
- What is the activity footprint of different connected groups?
- What combination of channels should I deploy to reach them?
- How do they interact with online video?
- What are the most popular social networks?

Content

- What barriers exist to paid forms of advertising?
- What's the size of the opportunity to engage through content?
- Which platforms are best suited to meeting different needs?
- How would people ideally like to interact with brands across key phases?

Commerce

- How far has connectivity changed the consumer journey?
- What's the profile of connected vs. disconnected shoppers?
- What's the level of YoY growth in eCommerce?
- What are the drivers of eCommerce disruption?
- What is the level of opportunity for eCommerce in my category?

Overview of Connected Life

What	Connected Life delivers the **market**, **target group** and **user** segment level data necessary to draw a strategy that answers four essential questions: How connected is my audience? How should I reach them? What do they want from my brand? How can I turn that into commercial opportunity?
Who	70,000 regular internet users aged 16-65
Where	57 markets
When	Fieldwork: June - July, Reporting in October 2016

Structure of all Connected Life reports and data

The 4 Cs – four topics that can be booked completely or separately

Consumers
How connected
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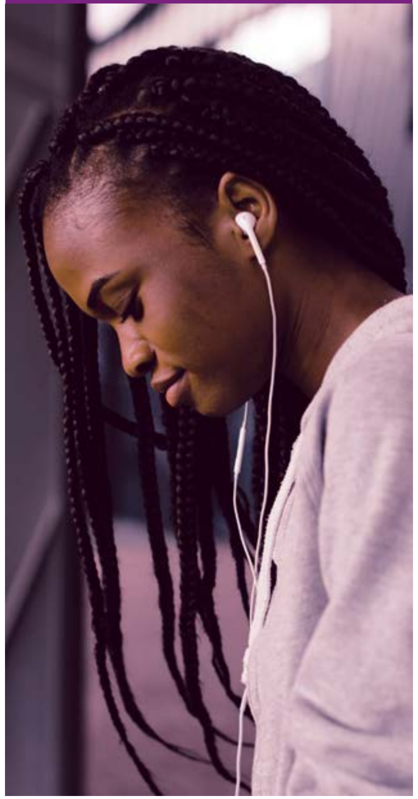

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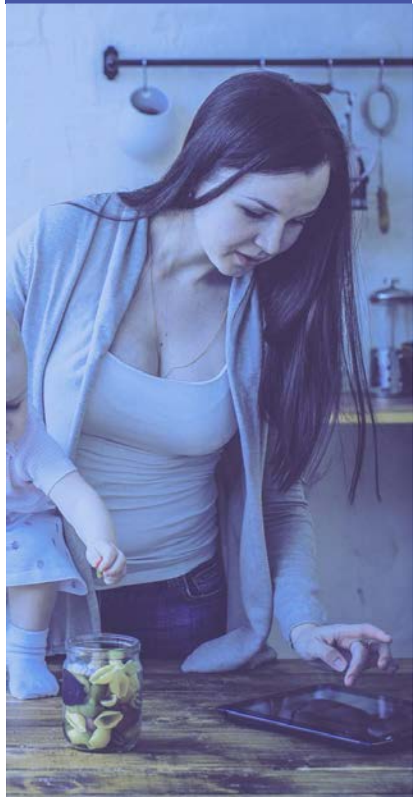

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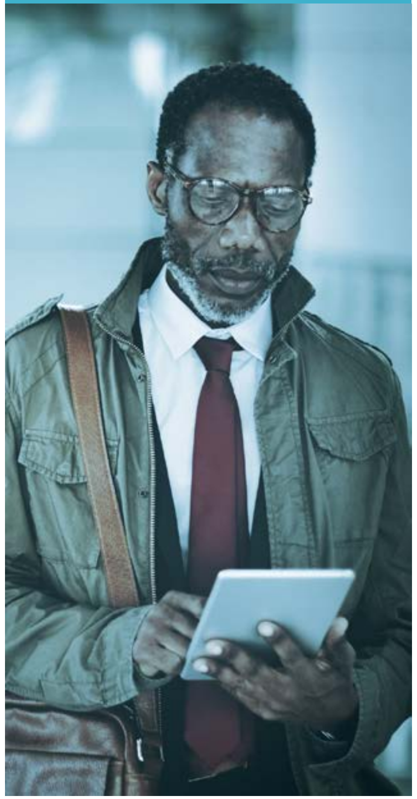


Commerce
How do I activate
against connected
commerce opportunities?

Consumers

How connected is my target?

How connected is my target?

Connectivity has a fundamental influence on how people consume media and make choices. Understanding connectivity and diversity within a target group helps brands and companies to dissect and more effectively communicate.

Behaviours are too diverse to be viewed in isolation: understanding how connected consumers are helps to unpick how brands can communicate throughout the journey and offers a “single view”

- What **devices** do they own, and how does this impact the media landscape?
- How are they impacted by **major trends**?
- How **diverse** are their connected behaviours?
- How should I **segment** and **target** them?

Connections

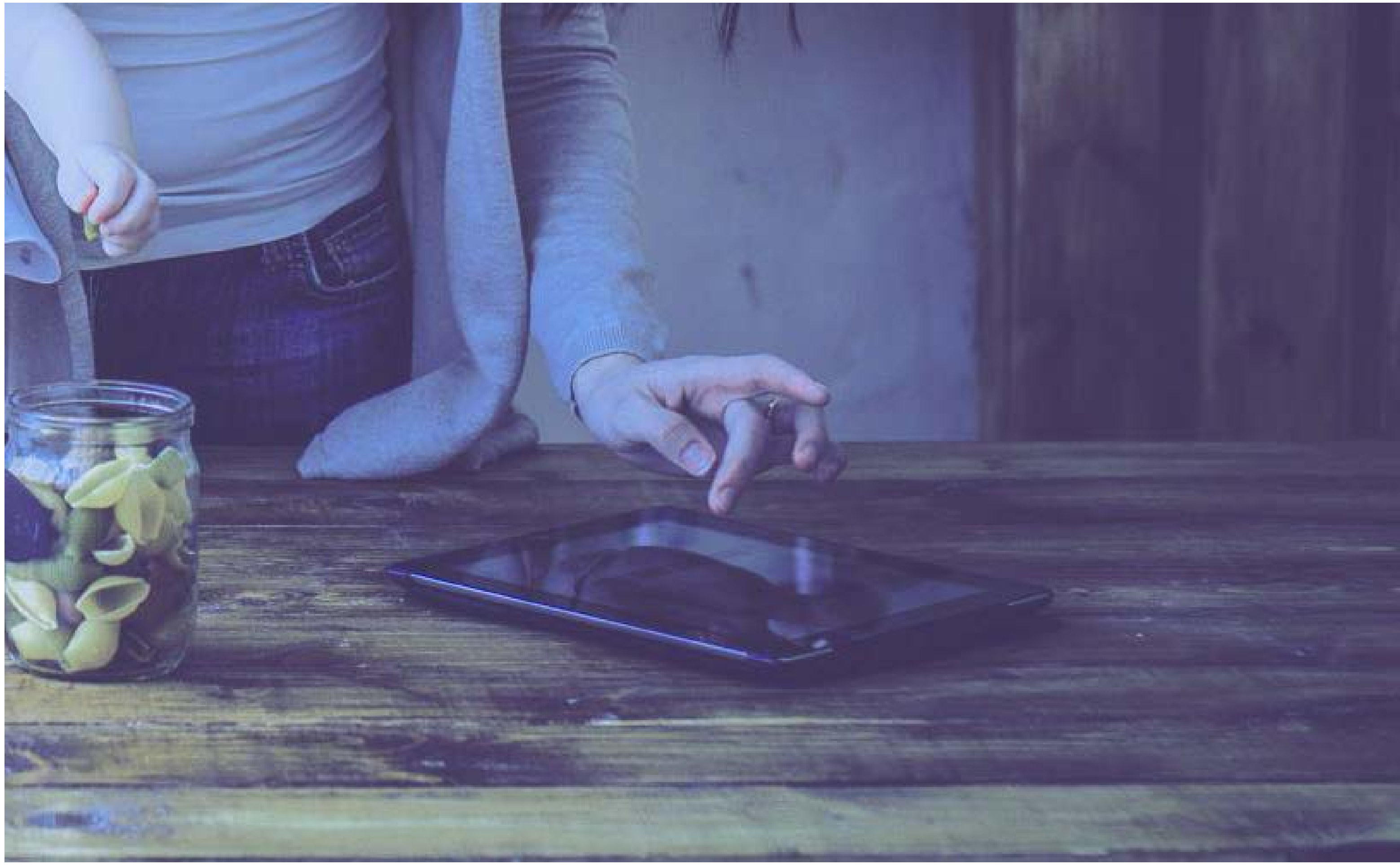
How do I reach them?

How do I reach them?

The expansion of online services means there is an increasing number of ways to consume media, and channels through which to communicate.

As the relationship between traditional and online media continues to evolve, there are key questions to be asked about which online activities and behaviours brands can exploit, to complement their offline investments, and maximise both reach and cut-through.

- How far has media **migrated online**?
- What is the activity footprint of different **connected groups**?
- What **combination** of channels should I deploy to reach them?
- How do they interact with **online video**?
- What are the most popular **social networks**?



Content

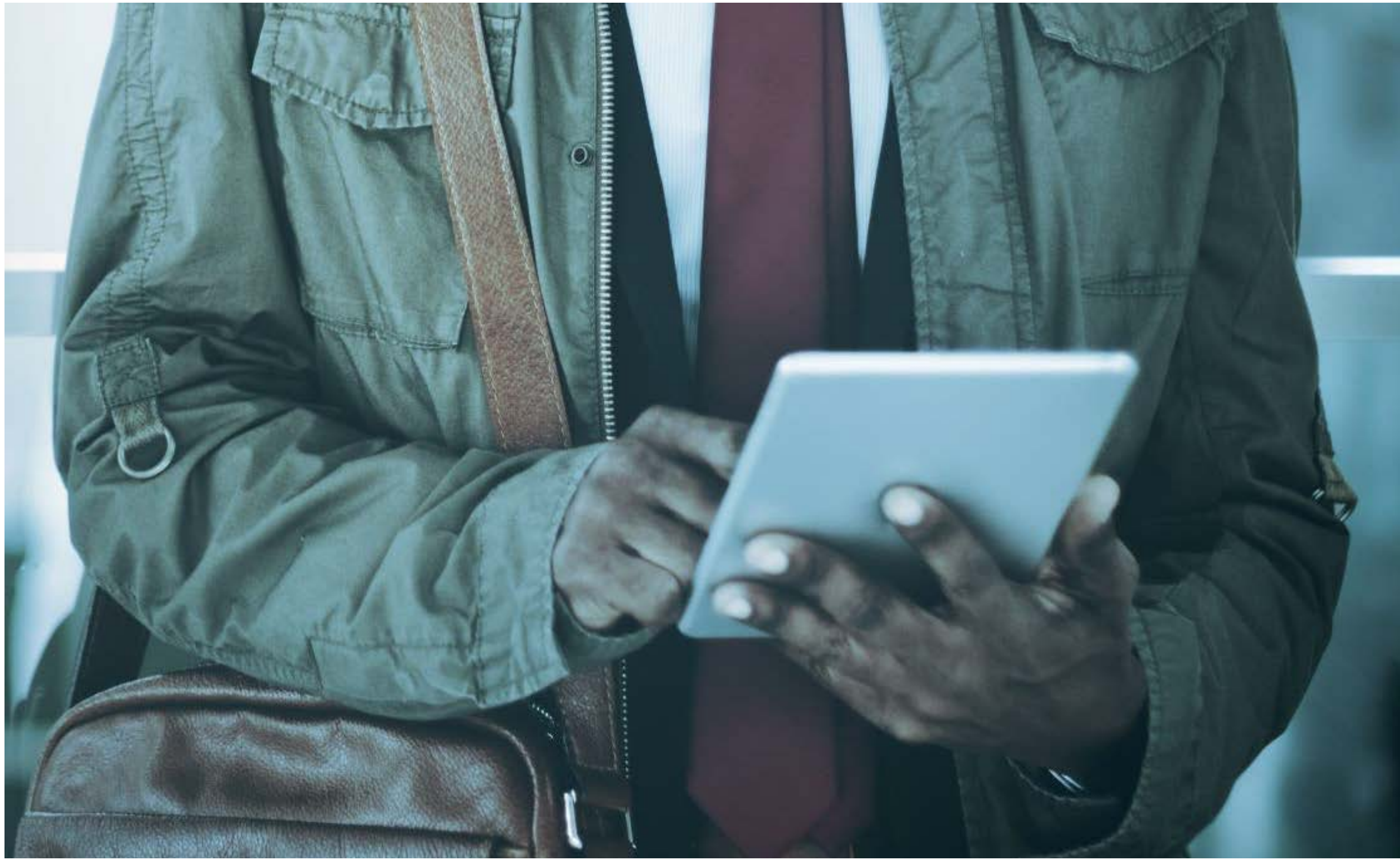
What content needs and platforms should I target?

What content needs and platforms should I target?

Users have grown increasingly sophisticated in their use of social, with brands responding and attempting to build relationships with them throughout the consumer journey.

But do this, content must be relevant in its message, method and moment. In some areas, brands may find it difficult to get their voices heard, or worse in an age of ad blockers, may not be welcome at all.

- What **barriers** exist to paid forms of advertising?
- What's the size of the opportunity to **engage** through **content**?
- Which platforms are best suited to meeting different **needs**?
- How would people ideally like to **interact with brands** across key phases?



Commerce

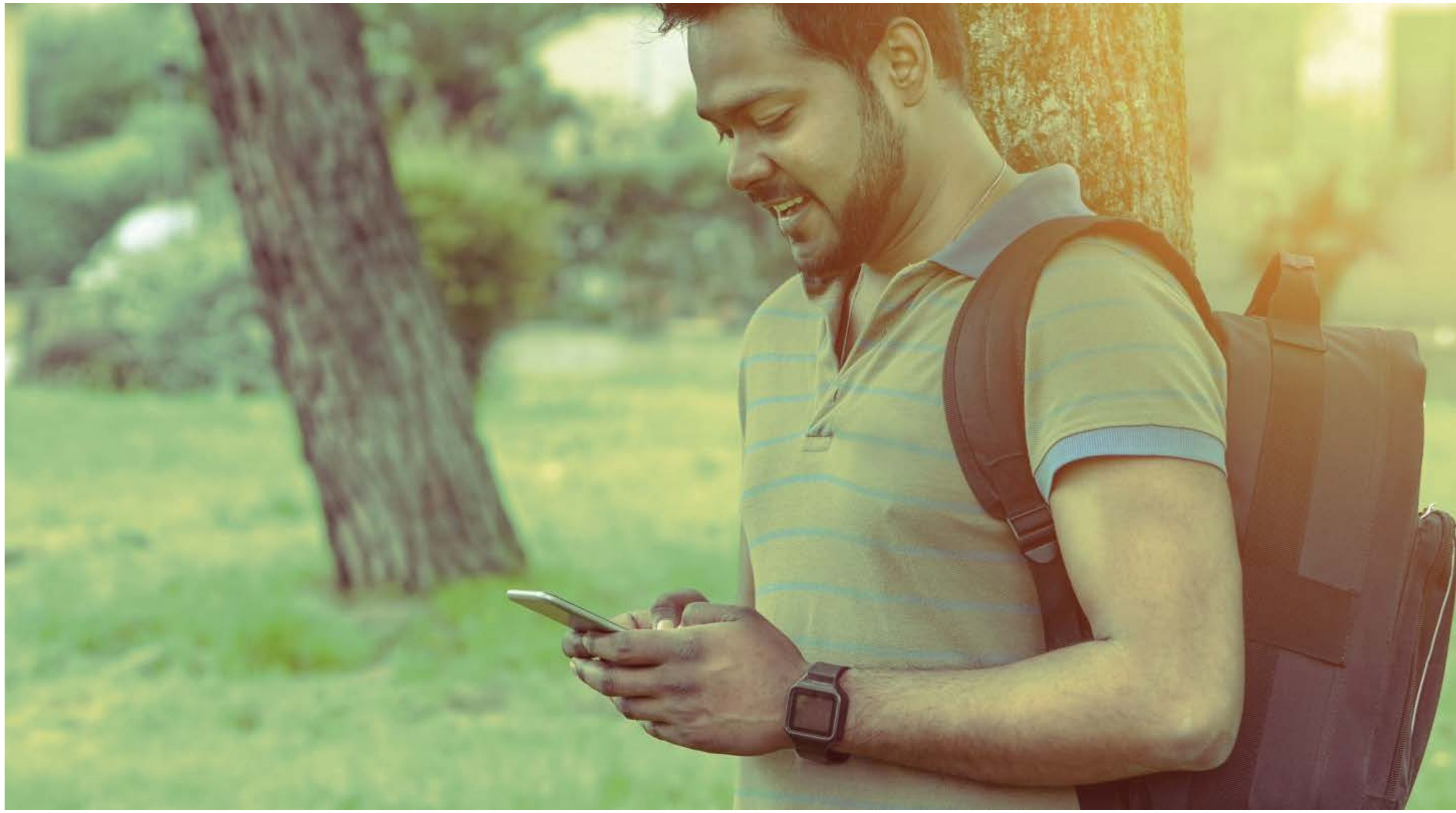
How do I activate against connected commerce opportunities?

How do I activate against connected commerce opportunities?

eCommerce has long been exploited as a quick way to increase sales. Yet the continual rise of social and mobile has provided an infrastructure suitable to far more disruptive business models.

Companies thriving in this infrastructure are not only tech-savvy, they also understand that future growth only comes from reducing existing frictions in the shopping process: time, energy and money.

- How far has connectivity changed the **consumer journey**?
- What's the **profile** of connected vs. disconnected shoppers?
- What's the level of YoY **growth in eCommerce**?
- What are the **drivers** of eCommerce **disruption**?
- What is the level of **opportunity** for eCommerce in my **category**?



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Methodology and country samples

	Sample	Method	Coverage
Argentina	1,000	Online	Major cities
Australia	1,000	Online	National
Belgium	**1,000**	Online	National
Brazil	1,000	Online	Major cities
Cambodia	500	CAPI	Major cities
Canada	1,000	Online	National
Chile	1,000	Online	National
China	2,480	CLT CAPI	Major Cities - Tiers 1-5
Colombia	1,000	Online	Major cities
Czech Republic	**1,000**	Online	National
Denmark	**500**	Online	National
Egypt	1,000	CAPI	Major cities
Finland	**1,000**	Online	National
France	**3,000**	Online	National
Germany	**4,000**	Online	National
Ghana	1,000	CAPI	Major cities
Greece	**500**	CAPI	Major cities
Hong Kong	1,000	Online	National
Hungary	**1,000**	CAPI	National

	Sample	Method	Coverage
India	5,000	CAPI	Major cities - Tier I and II
Indonesia	1,500	CAPI	Major cities
Ireland	**1,000**	Online	National
Israel	1,000	Online	National
Italy	**1,000**	Online	National
Japan	1,000	Online	National
Kenya	1,000	CAPI	Major provinces
Luxembourg	**1,000**	Online	National
Malaysia	1,000	Online	National
Mexico	1,000	CLT Web	Urban areas
Mongolia	800	CAPI	Major cities
Myanmar	1,000	CAPI	Tier 1-2
Netherlands	**1,000**	Online	National
New Zealand	1,000	Online	National
Nigeria	1,000	CAPI	Major urban areas
Norway	**1,000**	Online	National
Peru	1,000	Online	National
Philippines	1,000	CAPI	Major urban provinces
Poland	**1,000**	Online	National

	Sample	Method	Coverage
Portugal	**1,000**	Online	National
Romania	**840**	CAPI	National
Russia	**1,000**	Online	National
Saudi Arabia	750	CAPI	Major cities
Singapore	1,000	Online	National
Slovakia	**1,000**	Online	National
South Africa	1,000	CAPI	Major urban areas
South Korea	1,000	Online	National
Spain	**2,000**	Online	National
Sweden	**1,500**	Online	National
Switzerland	**500**	Online	National
Taiwan	1,000	Online	National
Thailand	1,000	CAPI	Major cities
Turkey	**1,000**	CAPI	Major cities
UAE	750	CAPI	Major cities
UK	**3,000**	Online	National
Ukraine	2,000	Online	National
USA	3,000	Online	National
Vietnam	1,000	CAPI	Major cities

57 countries

Fieldwork period:

06 June – 15 Aug 2016

Connected Life 2017

Targeting by categories: Greater depth for key categories

Apparel
- Clothes, shoes

Automotive
- New car
- Second hand car
- Car parts
- Car workshop services

Baby care
- Infant milk
- Baby food

Cleaning and laundry
- Cleaning/household products
- Laundry detergents

Financial services
- Credit cards
- Insurance
- Banking products

Food and drink
- Fast food or takeaway
- Food, as part of a grocery shop
- Alcoholic Beverages
- Non-alcoholic drinks
- Pet food

Hygiene products
- Personal hygiene products
- Oral Care

Medicine
- Over-the-counter medicines

Music
- Music (e.g. CDs, downloads)

Personal care
- Facial care products
- Cosmetics / make up
- Perfume or cologne
- Skin care products
- Hair care products

Technology
- PC / Desktop / Laptop
- Tablet
- Mobile phone or smartphone
- Camera (still or video)
- TV (LCD, 3D, Plasma, LED etc.)
- White goods and home appliances

Technology / media services
- A mobile-phone network contract
- A home-entertainment service
- A video game or video-game console

Tobacco
- Tobacco / cigarettes
- e-Cigarettes

Travel
- Flights
- Hotels / accommodation
- Cruise holiday

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Sample, weighting and quotas

Sample profile

The sample definition is as follows:

- **Sample is reflective of regular Internet users only.**
- A “regular Internet user” is someone who accesses the Internet at least once a week, on any device.
- Geographic sample coverage for each market is decided on a market-by-market basis. For some most markets coverage is national, but for some coverage is major urban areas only. See following slides for full details.
- All respondents are required to be aged 16-65 years old.

Weighting

Local weights are applied to the same factors that were deemed important enough to quota on. Where this approach was too strict and led to poor weighting efficiencies, weighting was relaxed on those factors with minimal impact (e.g. age or region bands widened) in order to provide an efficiency score above 50%.

Global weights are based on the respective proportion of the global Internet population each market accounts for and are applied when calculating scores combining more than one market.

Quotas

To ensure we best represent the regular Internet population, we have used quotas based on the Global Google-TNS Enumeration study (random sampling was used in markets where no sampling frame was available), or better local sources where available.

Quotas were applied to:

- Age x gender
- Education
- Region
- Frequency of Internet usage
- Weekday / weekend (to gain an accurate understanding of activities)
- Local market specific quotas (such as race, income etc.)

Contact

Dr. Malthe Wolf
Senior Director
Technology & Financial Services

Digital Transformation, Future Research
& Qualitative Research

Malthe.wolf@tns-infratest.com

KANTAR TNS

Wandel des KONSUMENTENVERHALTEN im Kontext der Digitalisierung

Connected Life 2016-17

8 Trends des digitalen Konsumentenverhalten

Herausforderungen des Management

Dr. Malthe Wolf, KANTAR TNS

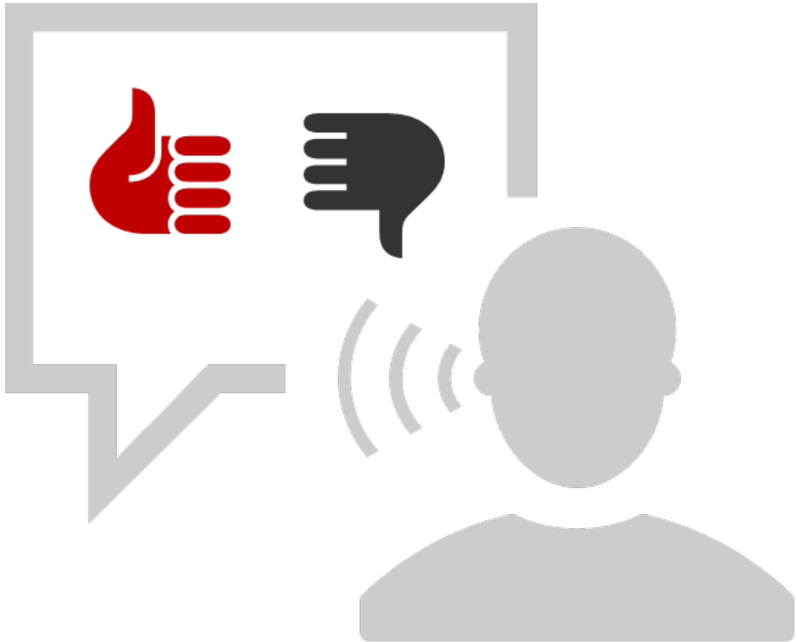
Starke Kunden-beziehungen

sind für Unternehmen die wichtigste Basis für den Geschäftserfolg.

Der Schlüssel zum Erfolg:
Die konsequente

Ausrichtung der gesamten Organisation

auf den digital lebenden Kunden.

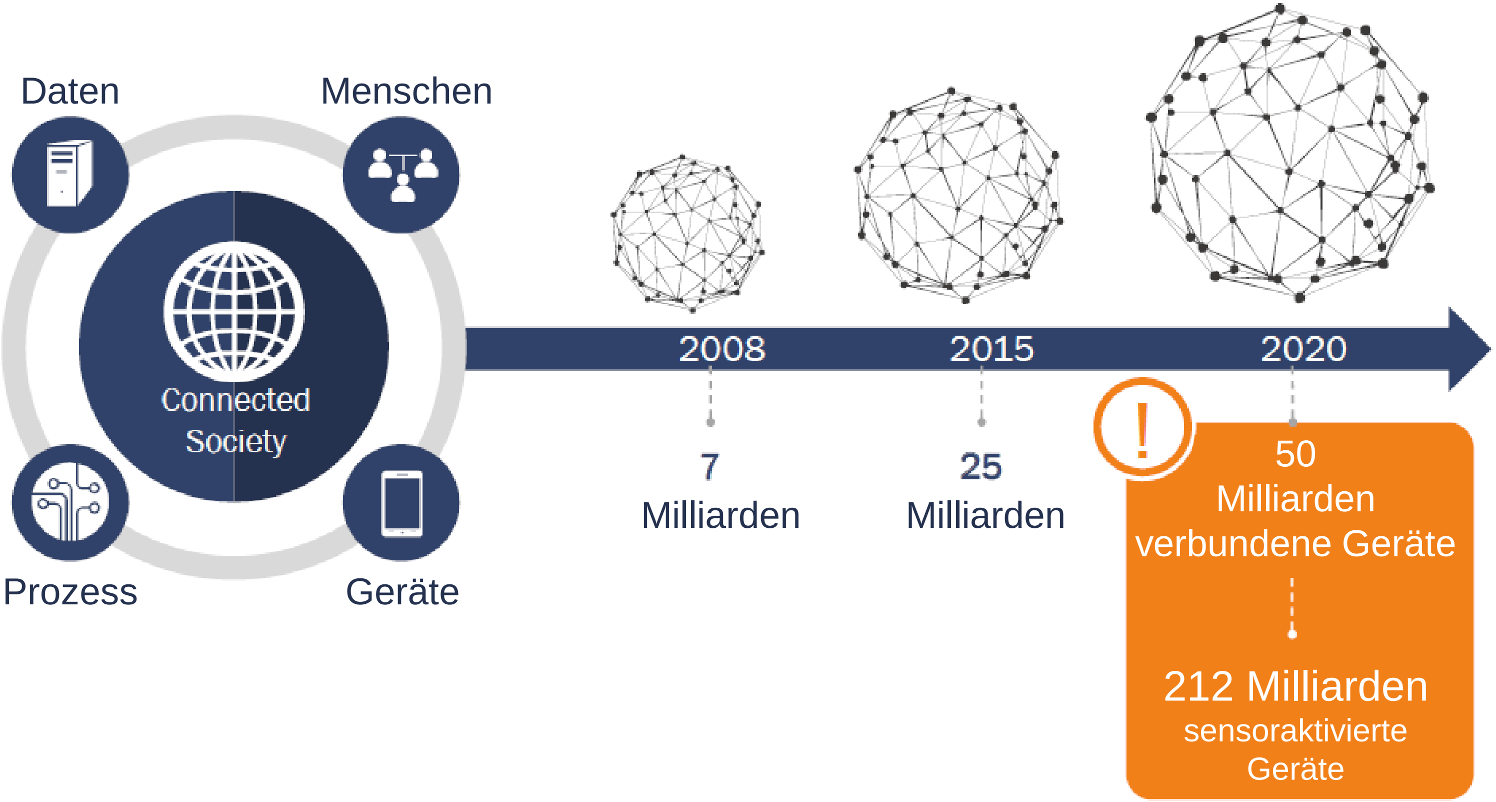


Vorsitzender des Vorstands
der Deutschen Bahn AG

„Wir stellen unsere Kunden und ihre Bedürfnisse in den Mittelpunkt des Handelns,
weil zufriedene Kunden die Basis für unseren unternehmerischen Erfolg sind.“

Quelle: Konzernleitbild der Deutschen Bahn

Die Connected Customer Experience hat gerade erst begonnen

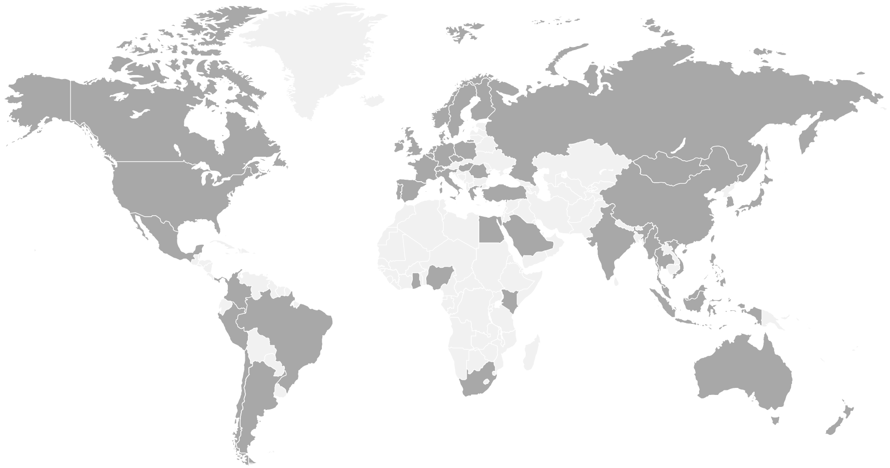


Quelle: Insight 2020 „Driving Customer-Centric Growth“ Report

Connected Life bedeutet eine definierte Anleitung, wie Konnektivität die Verbraucher, Verbindungen, Inhalte und Geschäfte verändert.

57 Märkte

70,000 Verbraucher



8 globale Trends der Konnektivität

Der vernetzte Kunde: 8 globale Trends

Constantly connected

Social fragmentation

Screen agnosticism

TV to content

App consolidation

Data exchange economy

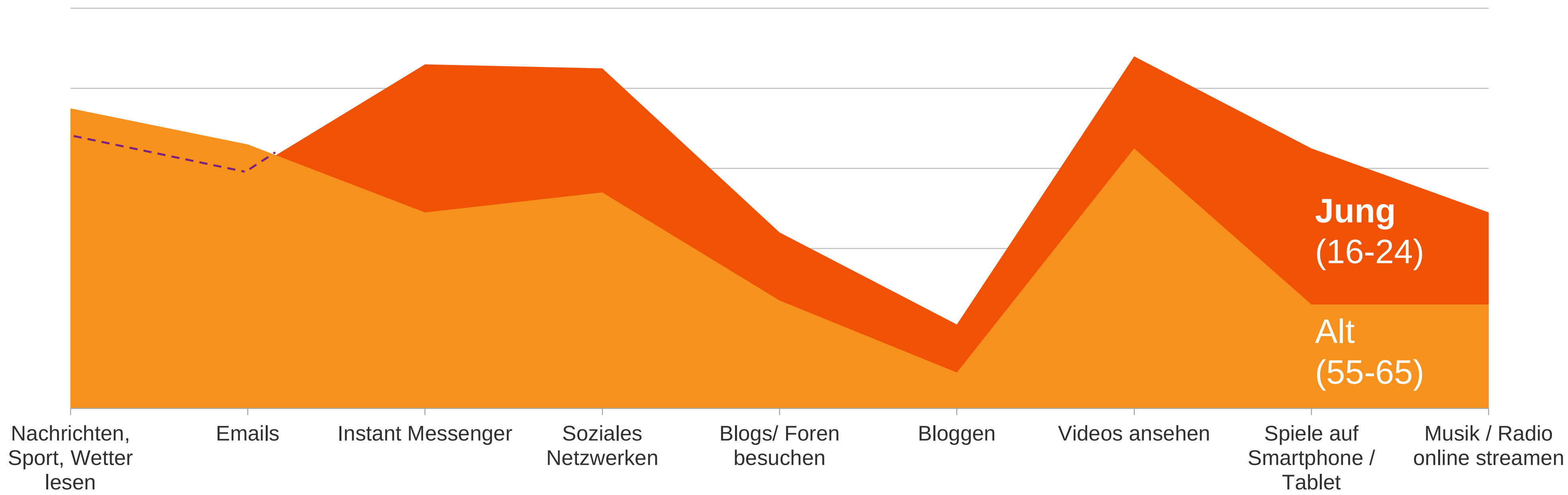
Ecommerce everywhere

Appetite for disruption

#1
Constantly connected

Vorsicht Lücke! Die digitale Spaltung nimmt zu

Wöchentliche digitale Aktivitäten (%)

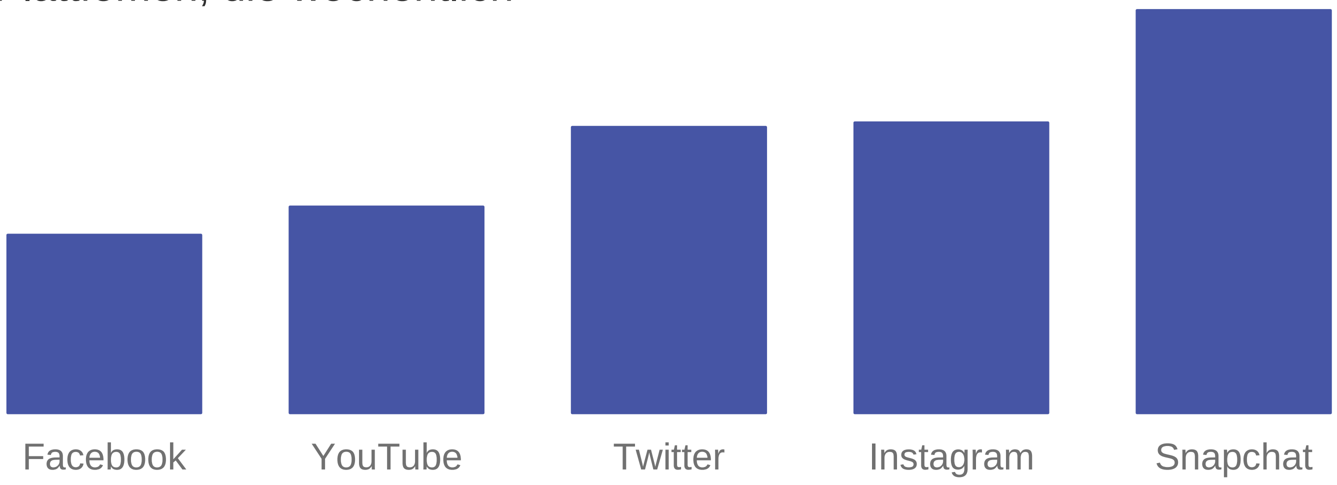


C1. Frequency of activities
Base: 16-24 year old (16,393) | 55-65 year old (7,360)

#2
Social fragmentation

Neue Plattformen nehmen zu

Anzahl an sozialen / IM Plattfomen, die wöchentlich genutzt werden

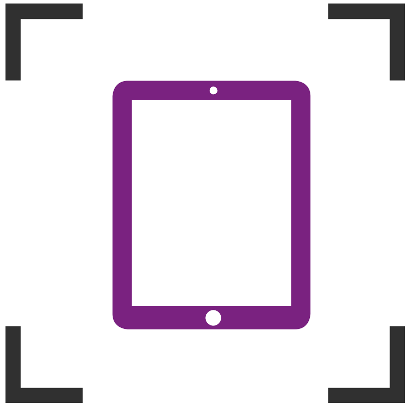


Platform launch year	2004	2005	2006	2010	2010

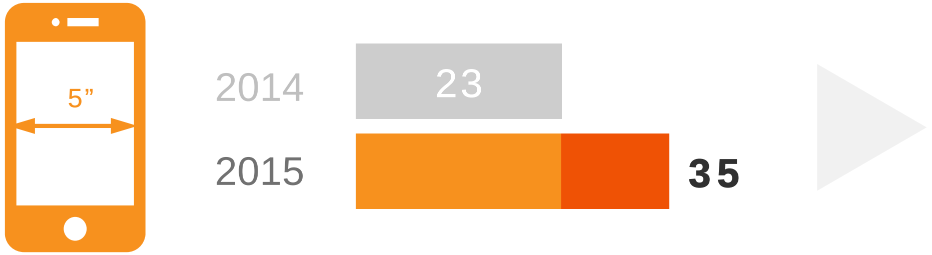
Average number of social/IM platforms used- Global
- Among platforms users

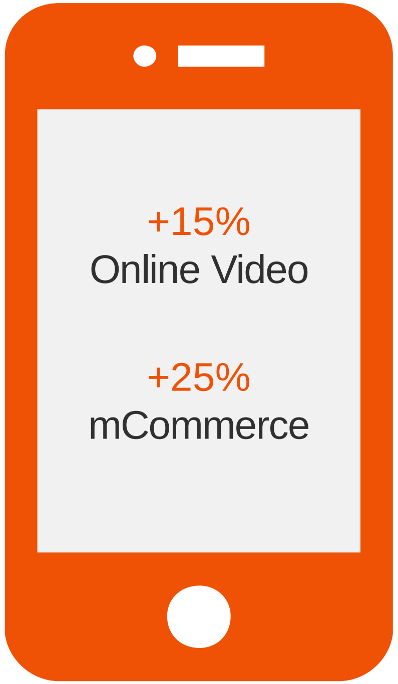
KANTAR TNS.

#3
Screen agnosticism



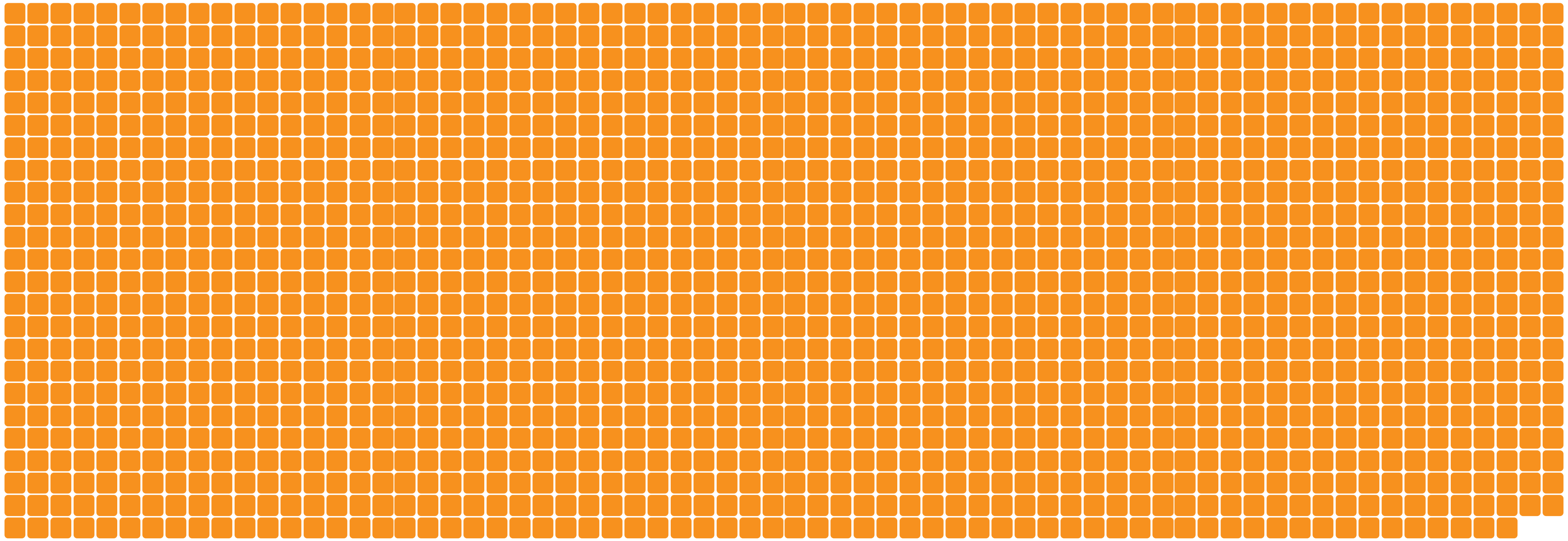
Die Welt bewegt sich in Richtung größerer, dennoch tragbarer Bildschirme



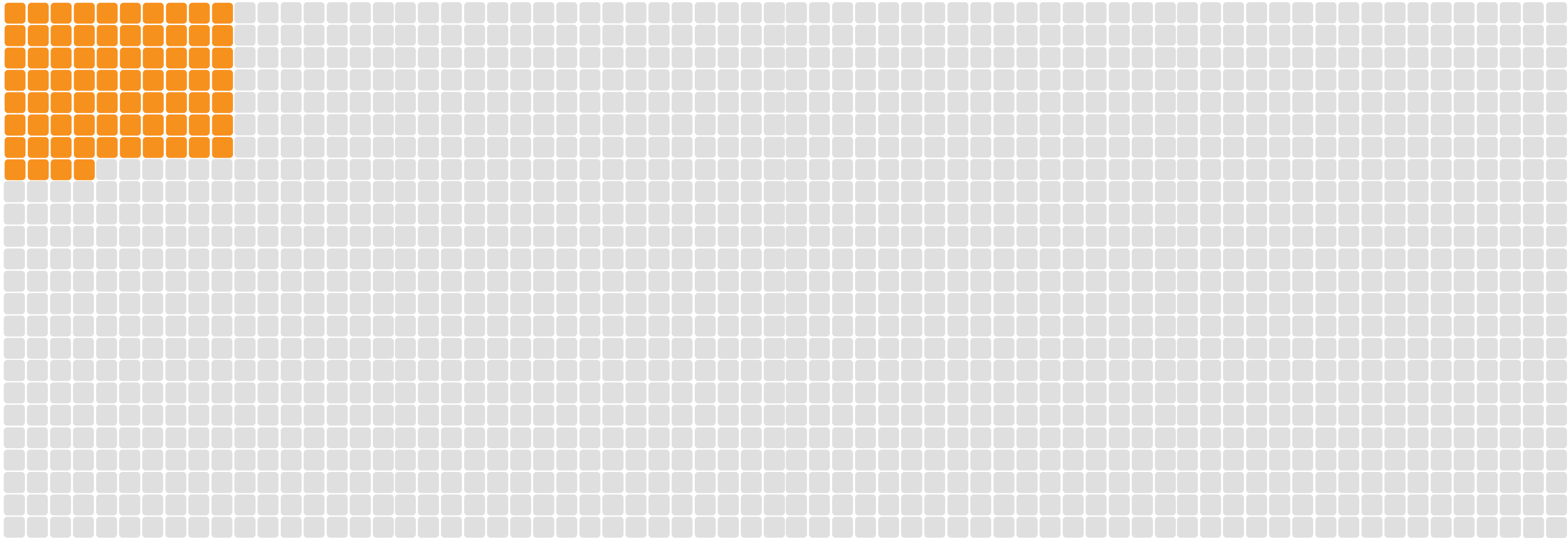


#5
App consolidation

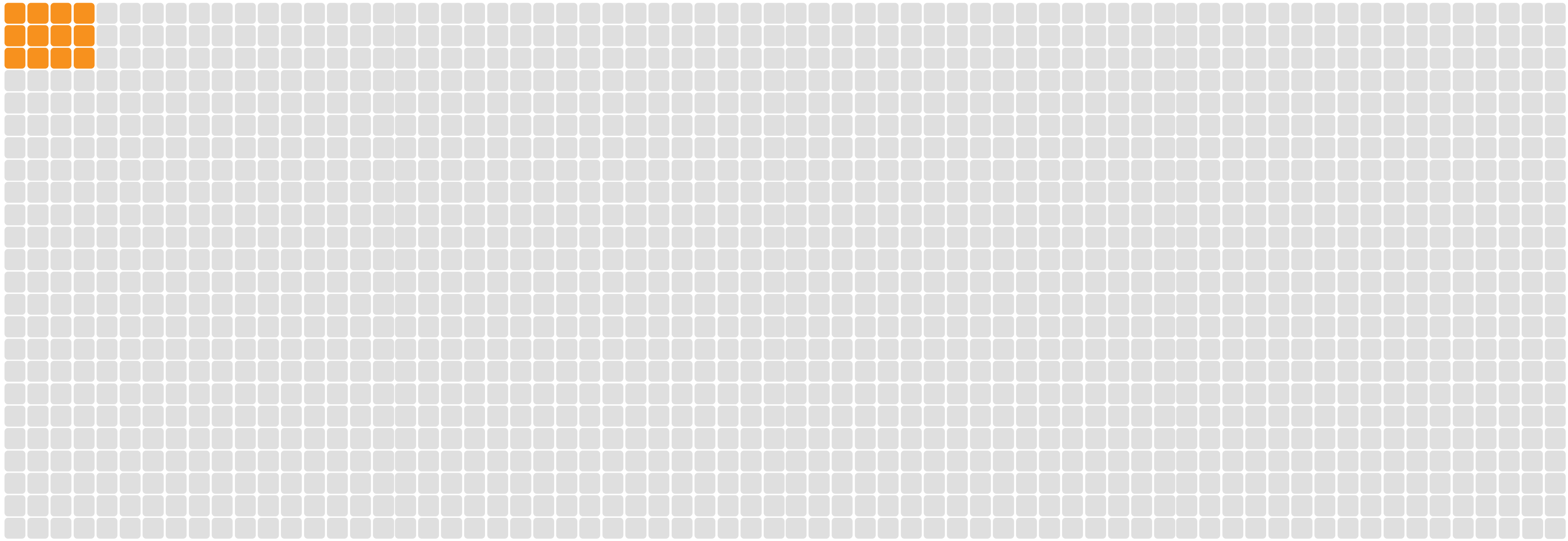
2.6m Apple App Store & Google play



App-Anzahl des durchschnittlichen Smartphone-User (USA) vs….



… tatsächlich durchschnittlich täglich genutzte App-Anzahl (USA)



#6
Data exchange economy

#7
Ecommerce everywhere

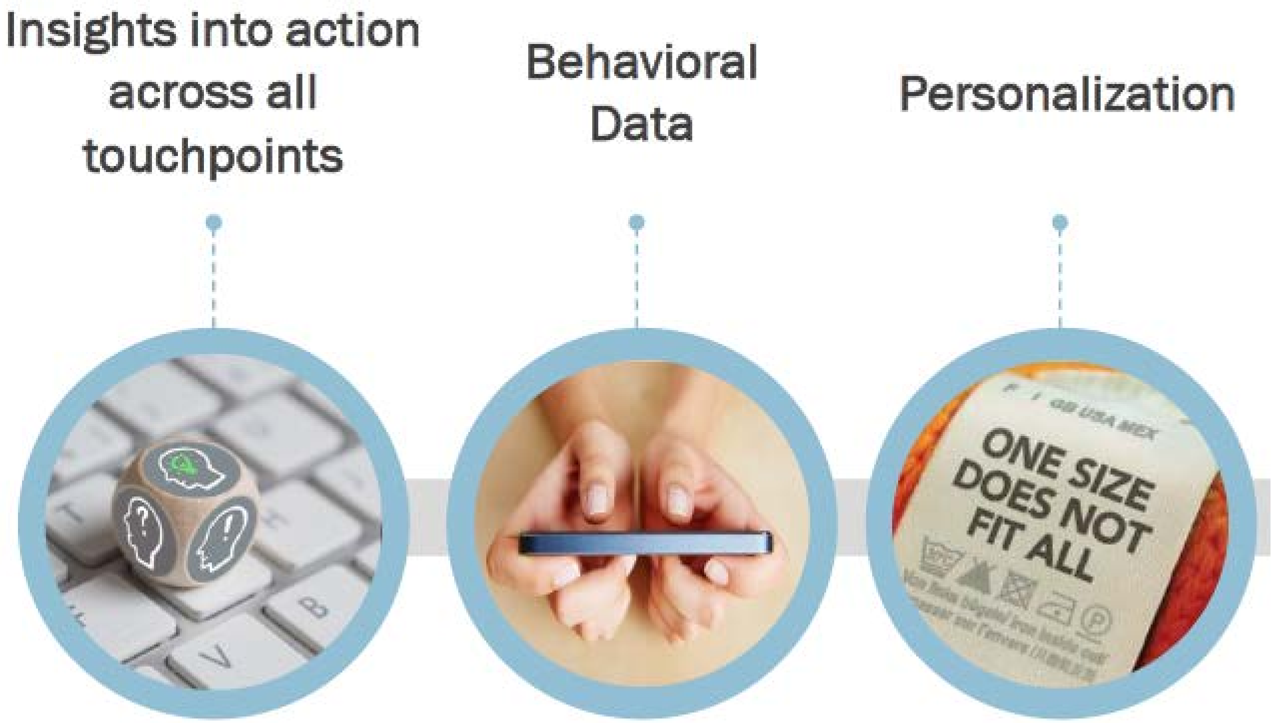
#8
Appetite for disruption

“Märkte verändern sich immer schneller als das Marketing”, Kotler

Evolution des Konsumenten: Der vernetzte Kunde

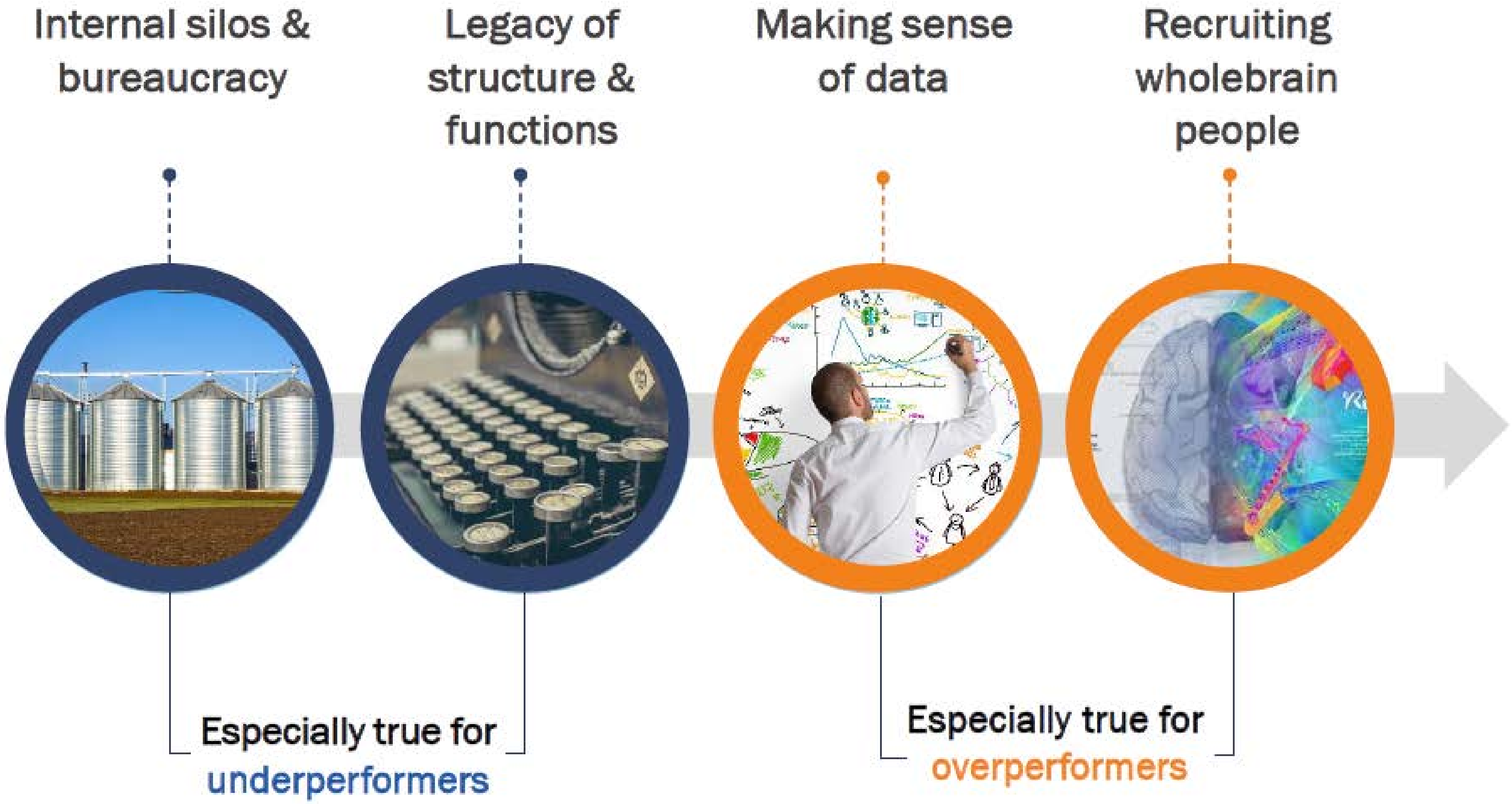
KANTAR TNS

Chancen der Connected Customer Experience



Quelle: Insight 2020 „Driving Customer-Centric Growth“ Report

Herausforderungen der Connected Customer Experience



Quelle: Insight 2020 „Driving Customer-Centric Growth“ Report

Eine Änderung der Einstellung

ist zentral, um ein wirklich digitalisiertes, kundenzentriertes Unternehmen zu werden

“Watching trends is not enough,
it is necessary to be a part of them.”

Denisa Kollárová,
Marketing Director, Czech Television

Contact

Dr. Malthe Wolf
Senior Director
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Digital Transformation, Future Research
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