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Trust in a Digital World

Treading the fine line between data driven marketing and stalking
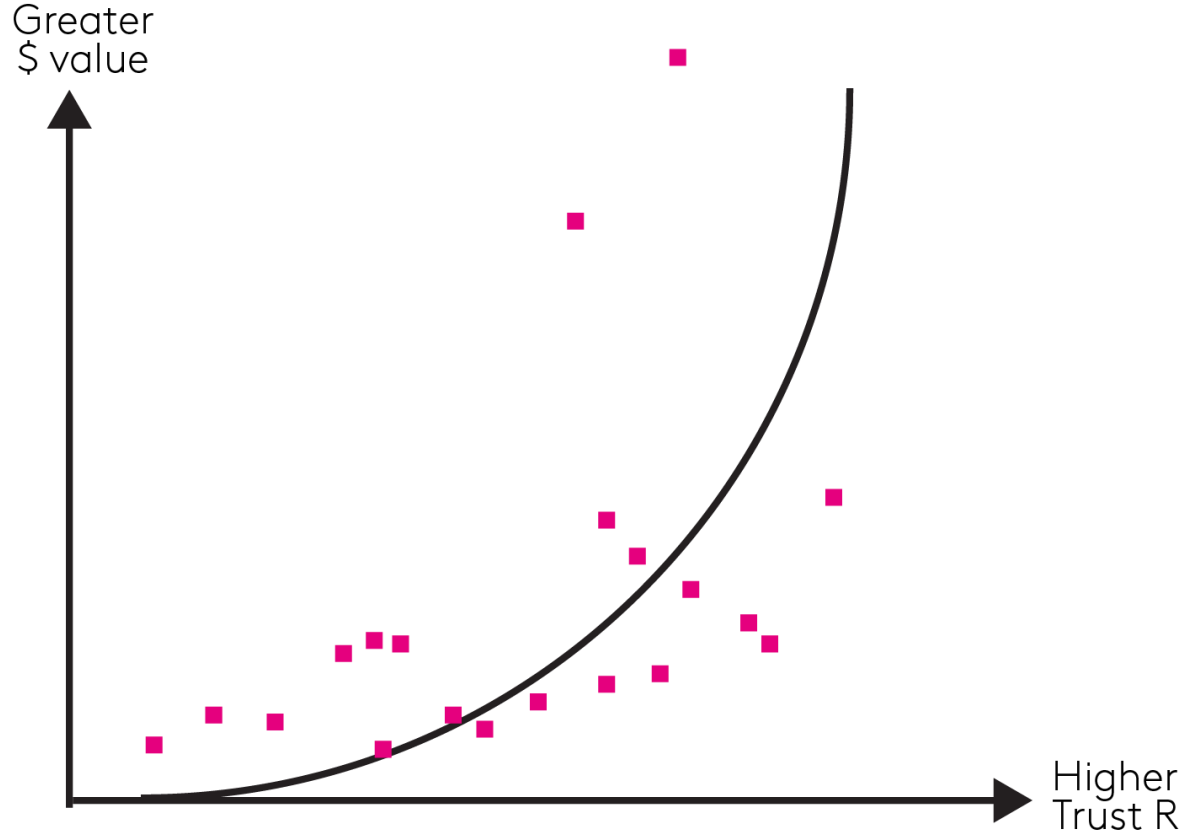
Connected Life provides the definitive guide to how connectivity is reshaping consumers, connections, content and commerce.

The study consists of thousands of interviews with internet users in more than 50 countries

Source: Kantar Millward Brown BrandZ

Greater
$ value

Higher
Trust R

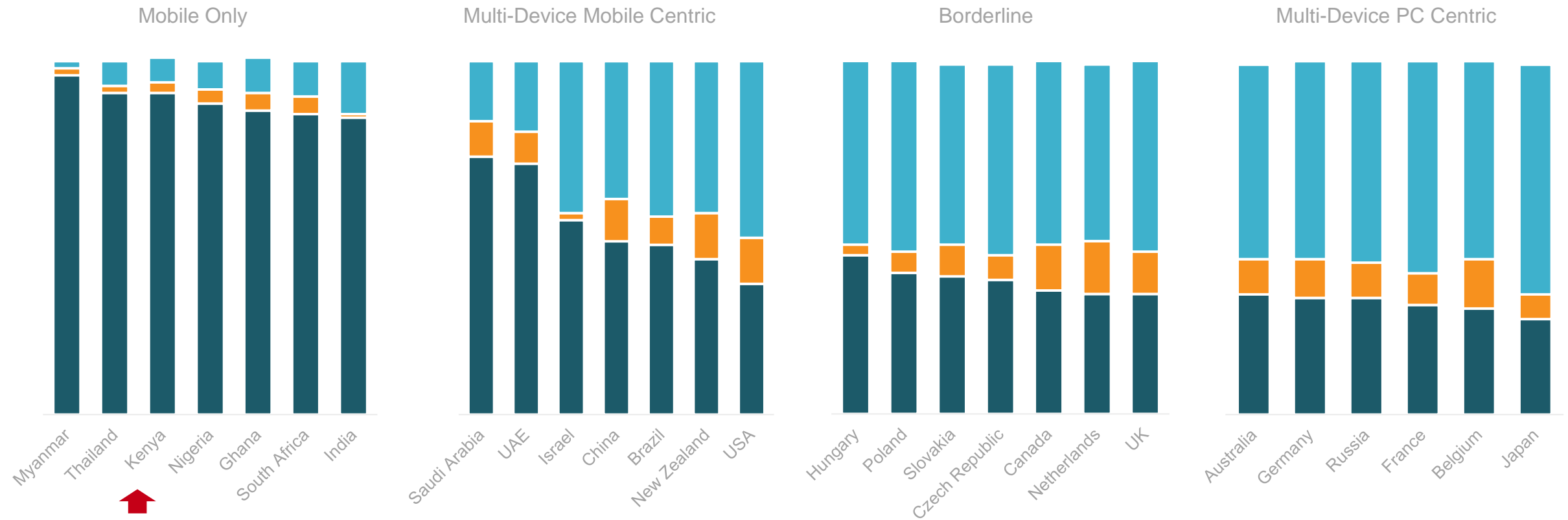Trust **+** Recommendation

= Success

Well intentioned digital marketing campaigns can undermine trust in brands

**As online behavior becomes more sophisticated,
digital marketing needs to evolve**

Kenya is one of the most mobile-centric nations in the world – 91% of device time is mobile

Device centricity
% time spent on mobile and tablet daily

■ Mobile   ■ Tablet   ■ PC

| Mobile Only | Multi-Device Mobile Centric | Borderline | Multi-Device PC Centric |

Myanmar, Thailand, Kenya, Nigeria, Ghana, South Africa, India

Saudi Arabia, UAE, Israel, China, Brazil, New Zealand, USA

Hungary, Poland, Slovakia, Czech Republic, Canada, Netherlands, UK

Australia, Germany, Russia, France, Belgium, Japan
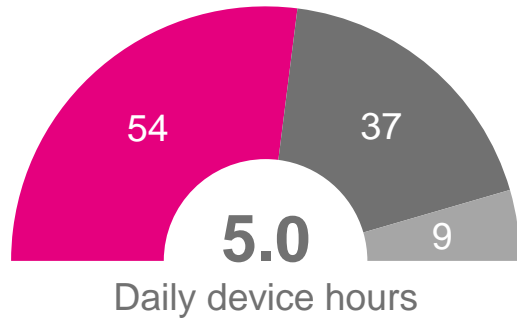
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Despite this,

Kenyan daily 'device time' is well ahead of the Global average, especially for mobile

Global

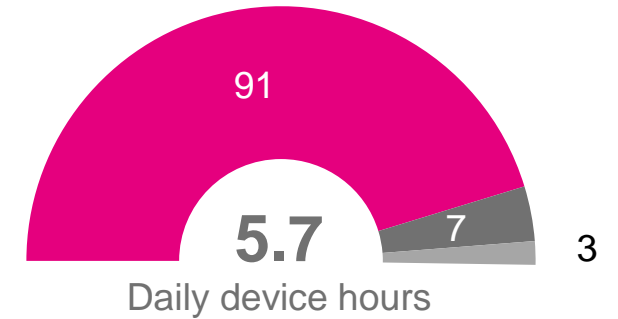■ Mobile   ■ PC   ■ Tablet

Share of time on devices: (%)

54   37

5.0   9

Daily device hours

Sub-Saharan Countries

■ Mobile   ■ PC   ■ Tablet

Share of time on devices: (%)

88

6.0   8
4

Daily device hours

Kenya

■ Mobile   ■ PC   ■ Tablet

Share of time on devices: (%)

91

5.7   7
3

Daily device hours
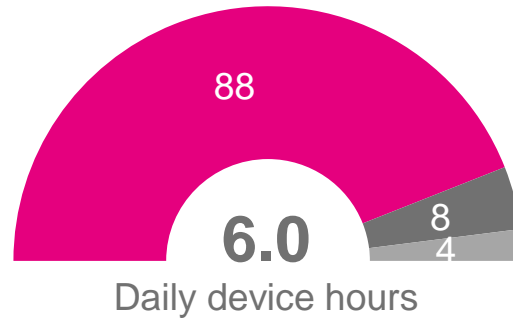
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Despite some of the lowest data charges on the continent, consumers remain data hungry…

And these data limitations change the shape of what people do online

Weekly activity usage – Kenya vs USA
%

■ USA   ■ Kenya

Activity	USA	Kenya
Messaging	64	92
Emails	90	37
Post photos	38	68
Social	76	81
Online articles	63	50
TV/movies (via subscription)	56	14
TV/movies (bought one-time)	28	16
TV/movies (free)	44	19
Video clips (free)	64	51
Video clips (on social)	58	75
Internet banking	57	11

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8
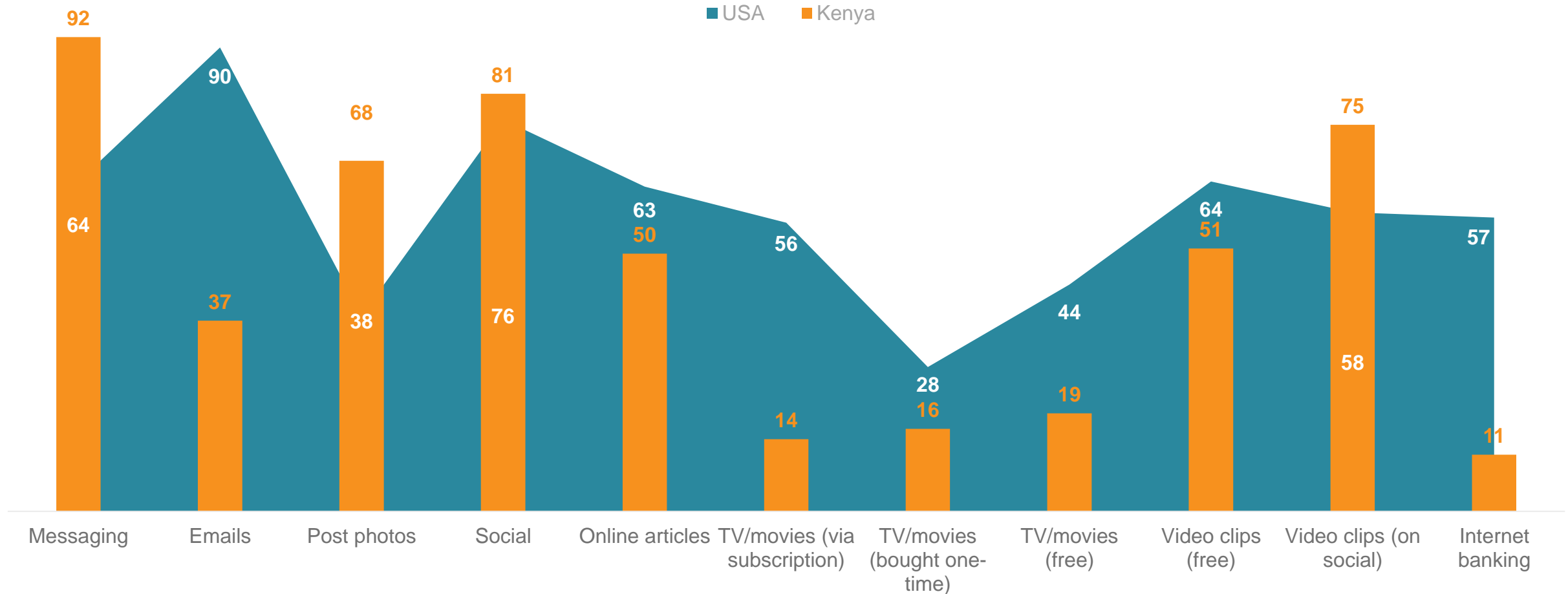
But this is changing….

Time spent on key online activities – Kenya 2016 vs 2017
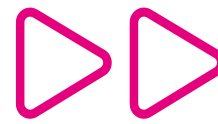
% change in daily usage

+11%	+10%	+12%	+4%
Posting photos	**Watching free video clips**	**Watching free video clips on social media**	**Online banking**

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When it comes to data, consumers give up a lot to get a little…

"The user may be required, at Purple's discretion, to carry out 1,000 hours of community service.

This may include the following: Cleansing local parks of animal waste. Providing hugs to stray cats and dogs. Manually relieving sewer blockages. Cleaning portable lavatories at local festivals and events. Painting snail shells to brighten up their existence. Scraping chewing gum off the streets."

Over two weeks, 22,000 people accepted the terms and conditions.

Only one person claimed the prize

So what is the opportunity for digital marketing in this landscape?

Around the world social is fragmenting,

in Kenya Facebook and WhatsApp remain king

Global		Kenya
Average time spent on social (hrs/day)		
1.5		2.5
Average number of social platforms used weekly		
8.4		4.7
Weekly Platform usage		
72% 64%		89% 85%

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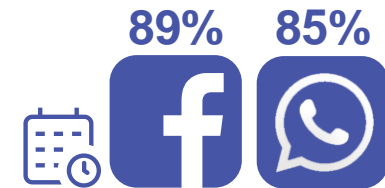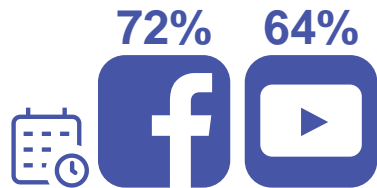
The consumer response differs around the world

Consumers who have more trust in products from **big global brands…**

57%

39%

21%

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Key question: how far are your customers willing to trust machines?

40%
Are happy how much information companies know about them

48%
Like that social networks select information relevant to them

43%
Are happy with connected devices gathering information on what they do

37%
Are concerned how much information companies know about them

29%
Are concerned social networks control what they see

35%
Reject connected devices gathering information on what they do
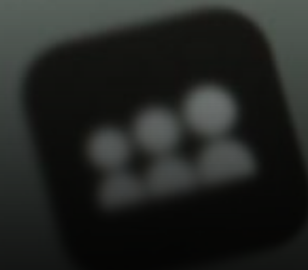
KANTAR TNS.
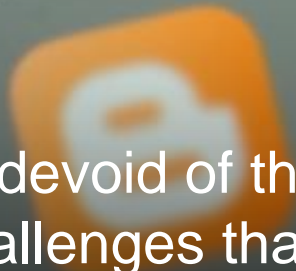
So in many ways,

Kenya is a simpler market devoid of the fragmentation and trust challenges that 'digital' normally brings…

A single online media channel (facebook) dominates

One size fits all digital marketing campaigns will not work…

Note that simple demographics can hide a diversity of online behaviours and attitudes

OBSERVERS
Spend a lot of time online, but are less open to engaging with brands in a social space.

FUNCTIONALS
Spend the least time online – either through choice, or lack of access. Will often use online where there is a tangible advantage, but are the slowest to adopt new trends. The least social of all the groups.
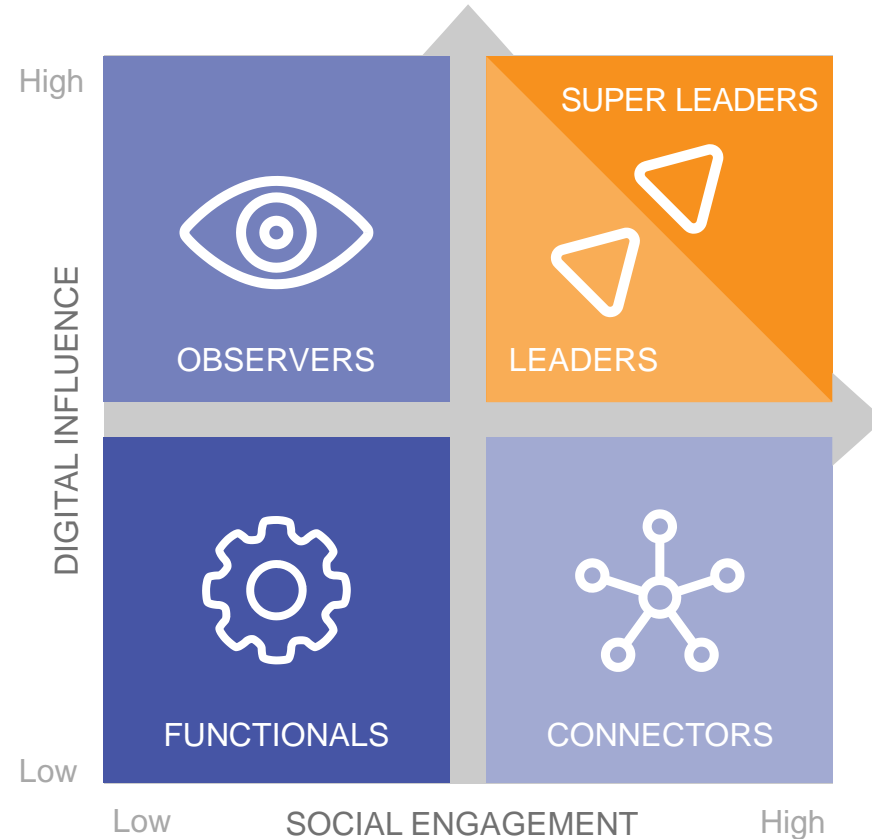
SUPER LEADERS
Within the leader segment – the most active and most social group of all. Likely to be the earliest of adopters, the influencers and the trend setters.
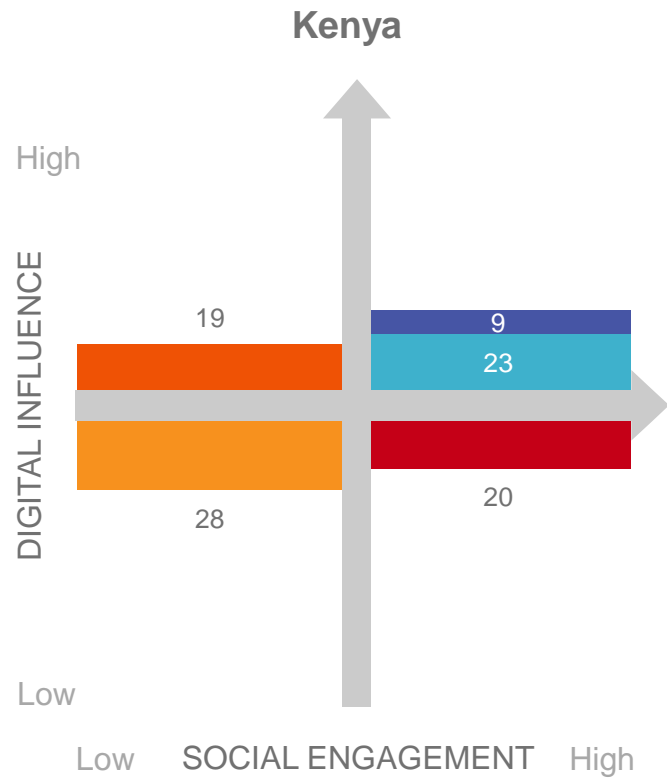
LEADERS
The most digitally, and socially active of all the segments. They may be online as much as the Observers, but they are highly social, creating and sharing content, and engaging with brands.

CONNECTORS
Spend a limited time online, but when they are, they are heavily social.

High

SUPER LEADERS

OBSERVERS

LEADERS

DIGITAL INFLUENCE

FUNCTIONALS

CONNECTORS

Low

Low   SOCIAL ENGAGEMENT   High

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But Kenya (like every market) is diverse and changing

% change vs 2016

Kenya

High

DIGITAL INFLUENCE

19

9

23

28

20

Low

Low   SOCIAL ENGAGEMENT   High
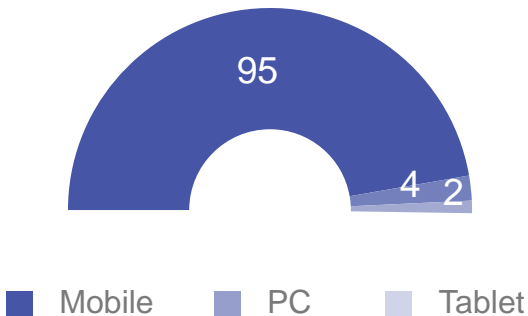
■ FUNCTIONALS   -10%

■ OBSERVERS   -2%

■ CONNECTORS   +8%

■ LEADERS   +6%

■ SUPER LEADERS   -3%

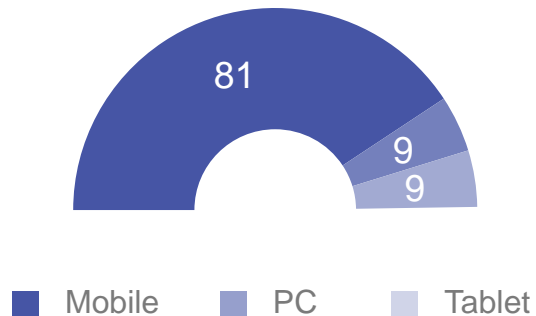KANTAR TNS.

Comparing Functionals and Super Leaders

Functionals

Consumers
Establish target connectivity

They're online every day for (hrs):	4.9
Number of devices they own:	1.2

And the devices they mostly use are:

95
4 2

■ Mobile ■ PC ■ Tablet

Super Leaders

Consumers
Establish target connectivity

They're online every day for (hrs):	7.8
Number of devices they own:	1.6

And the devices they mostly use are:

81
9
9

■ Mobile ■ PC ■ Tablet

Functionals

Connections
Identify major reach platforms

No. of online activities they'll do per week:	7.1

The most popular online activities are:

INSTANT MESSAGING/CHATTING

ACCESS SOCIAL NETWORKS

VIDEO CLIPS - ON SOCIAL NETWORK

And they're combining TV and online video:

	HIGH TV LOW OV	HIGH TV HIGH OV
HIGH TV LOW OV	52%	3%
LOW TV LOW OV	42%	3%

HIGH TV LOW OV — HIGH TV HIGH OV
LOW TV LOW OV — LOW TV HIGH OV

Super Leaders

Connections
Identify major reach platforms

No. of online activities they'll do per week:	13.2

The most popular online activities are:

INSTANT MESSAGING/CHATTING

VIDEO CLIPS - ON SOCIAL NETWORK

UPLOAD PHOTOS, VIDEO OR MUSIC

And they're combining TV and online video:

	HIGH TV LOW OV	HIGH TV HIGH OV
HIGH TV LOW OV	32%	24%
LOW TV LOW OV	26%	19%

HIGH TV LOW OV — HIGH TV HIGH OV
LOW TV LOW OV — LOW TV HIGH OV

The majority of activity is still wasted

20% of touchpoints = **80%** of impact

1 in 20 pieces of content create engagement

Indeed, globally many are arguing that digital marketing is 'broken'
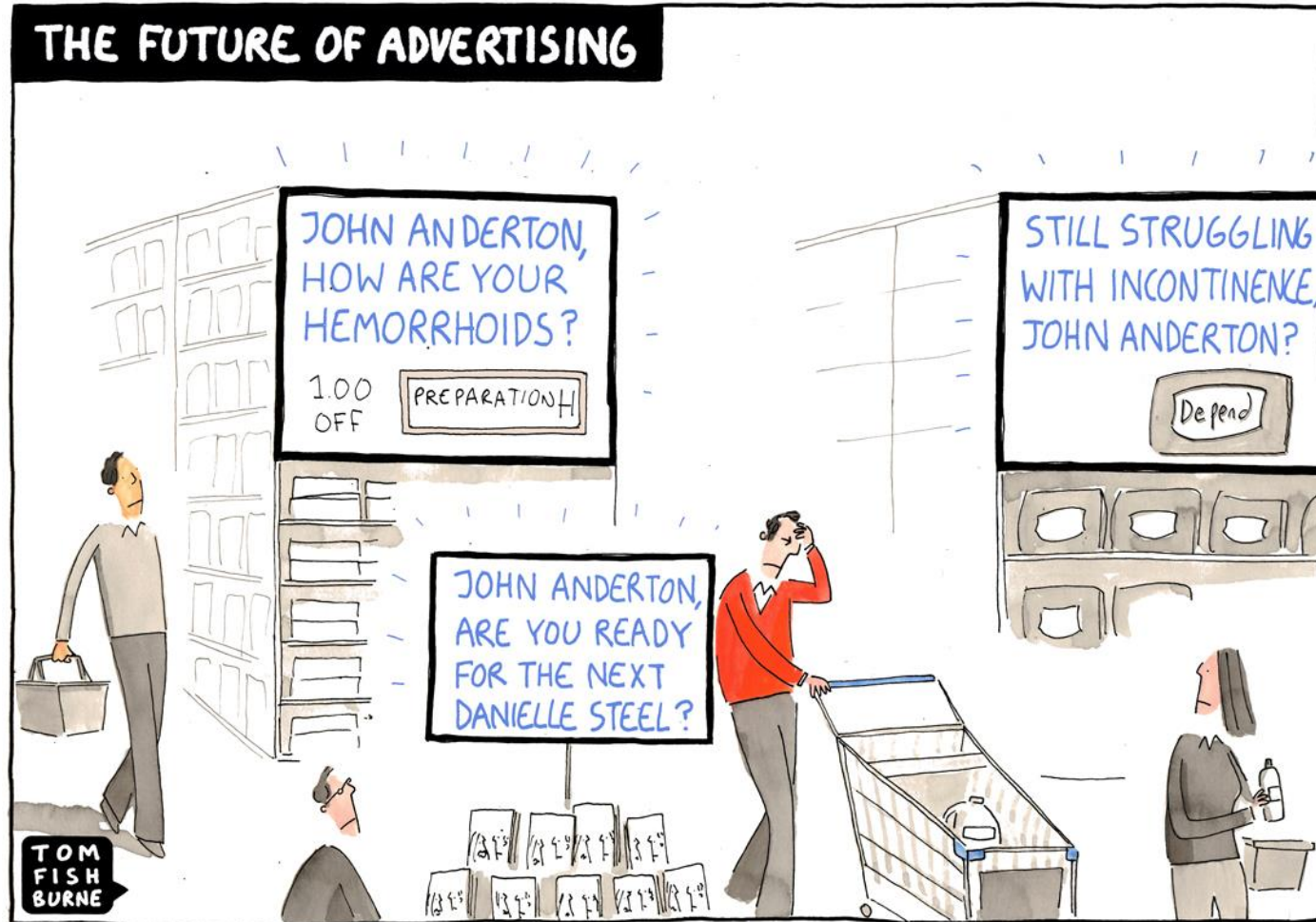
Visibility of Ads

Ad Fraud

Cost transparency

Inconsistency in metrics

Walled gardens preventing true ROI
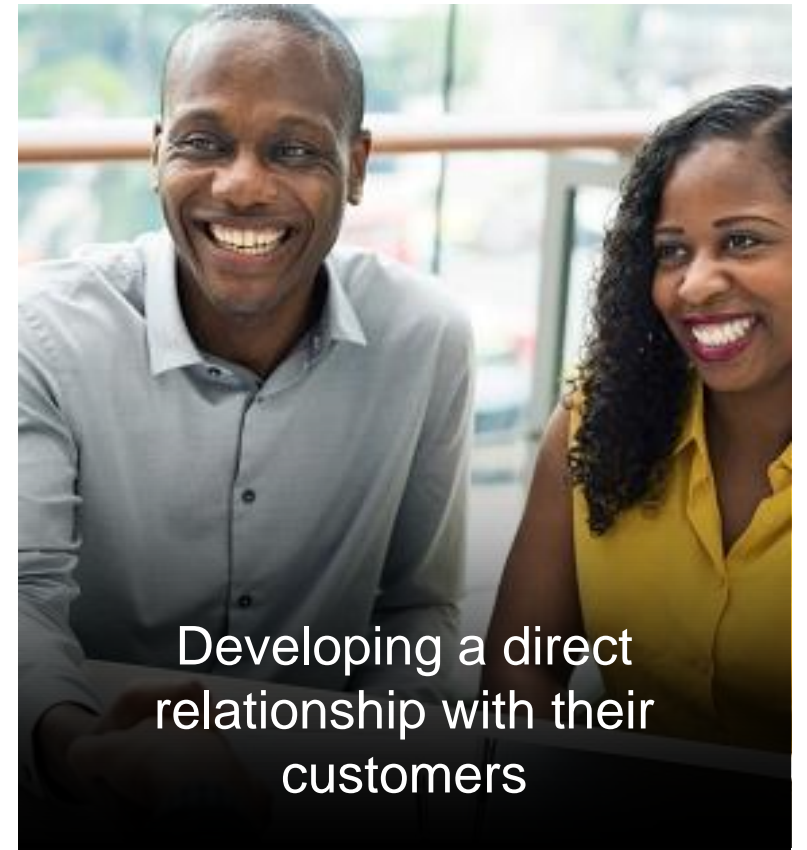
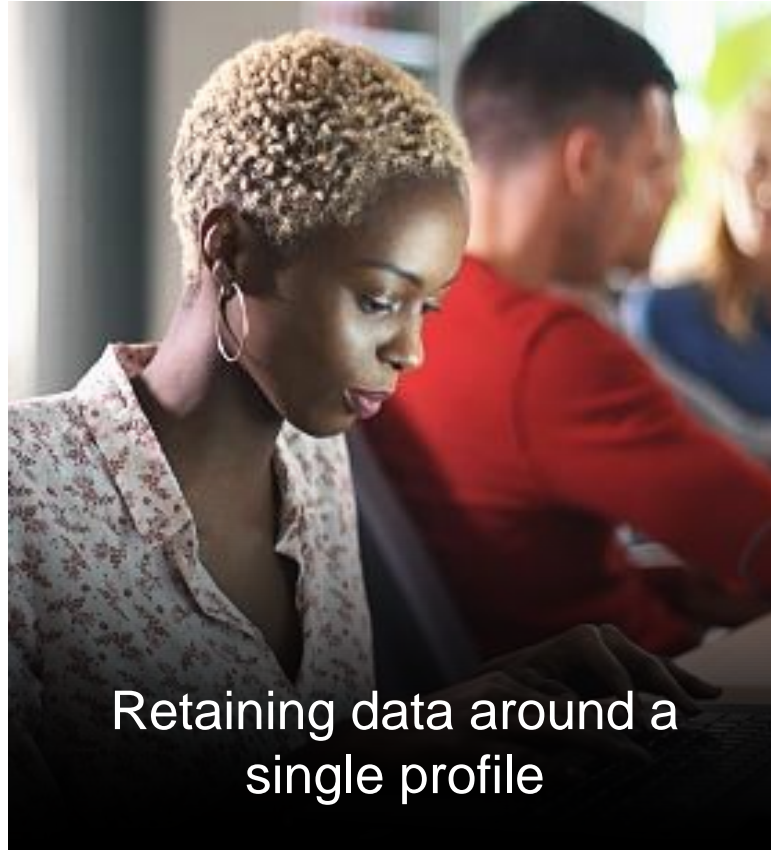Questionable ROI

Unethical use of data

60%
of consumers in the U.S are concerned about the amount of personal data that companies know about them.

They feel bombarded and intruded upon

To counter,
leading brands are taking control of their own destiny
through developing a Single View of the Customer

How are they doing this?

Collecting 1st party data

Retaining data around a single profile

Developing a direct relationship with their customers

Why is this so important?

1.
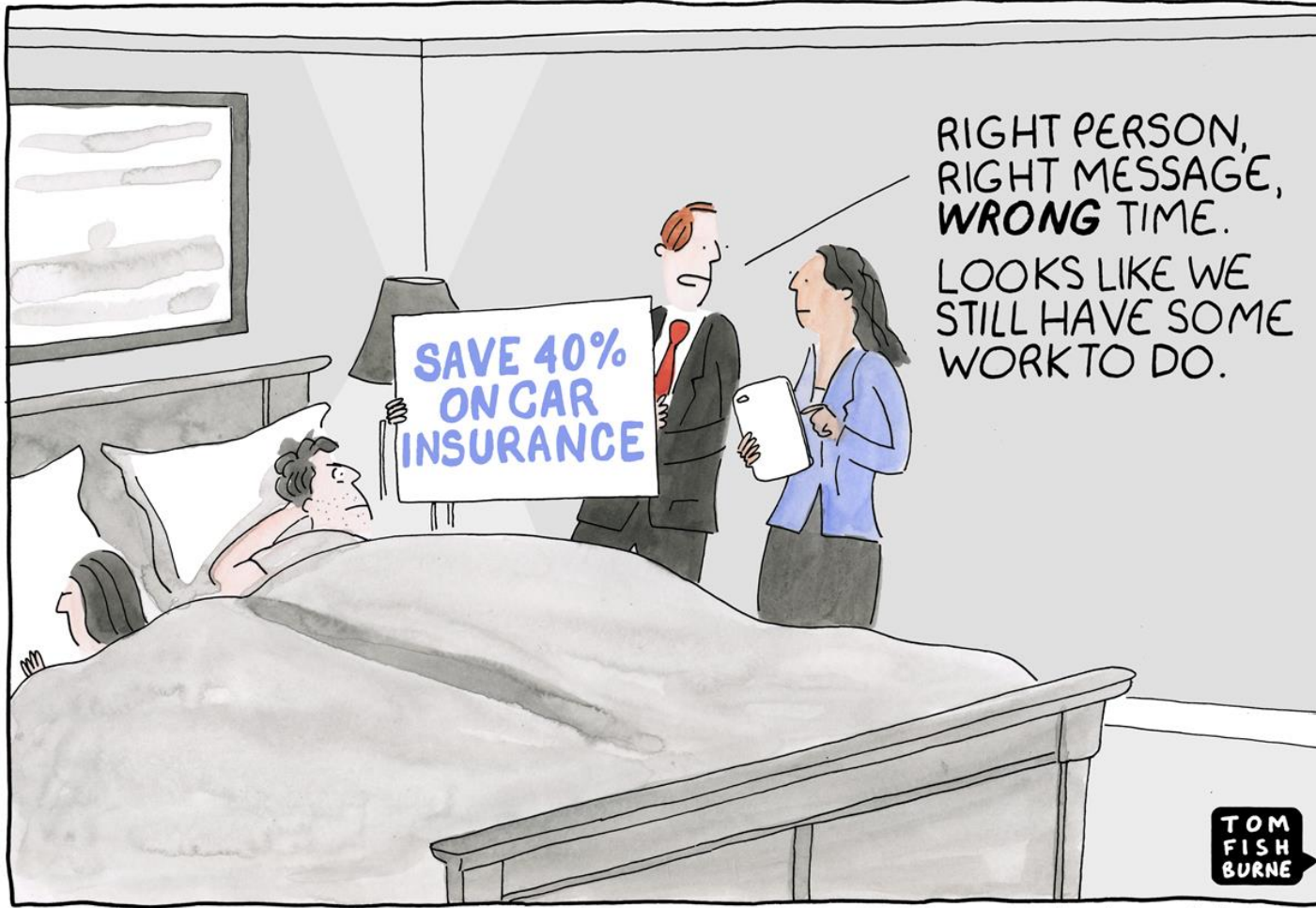
Data = competitive advantage

2.

"intelligent" marketing

3.

ROI

But some brands are using very personal data to provide real value

Data driven marketing

Creepiness
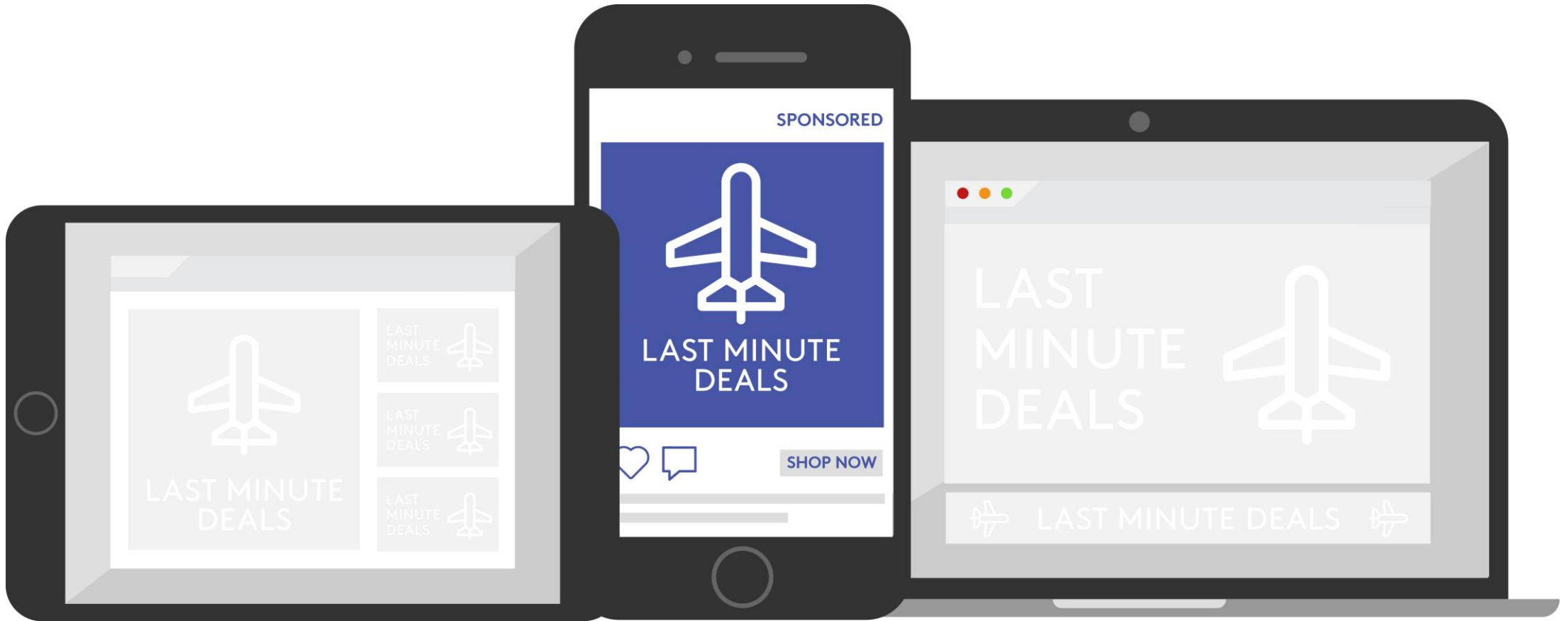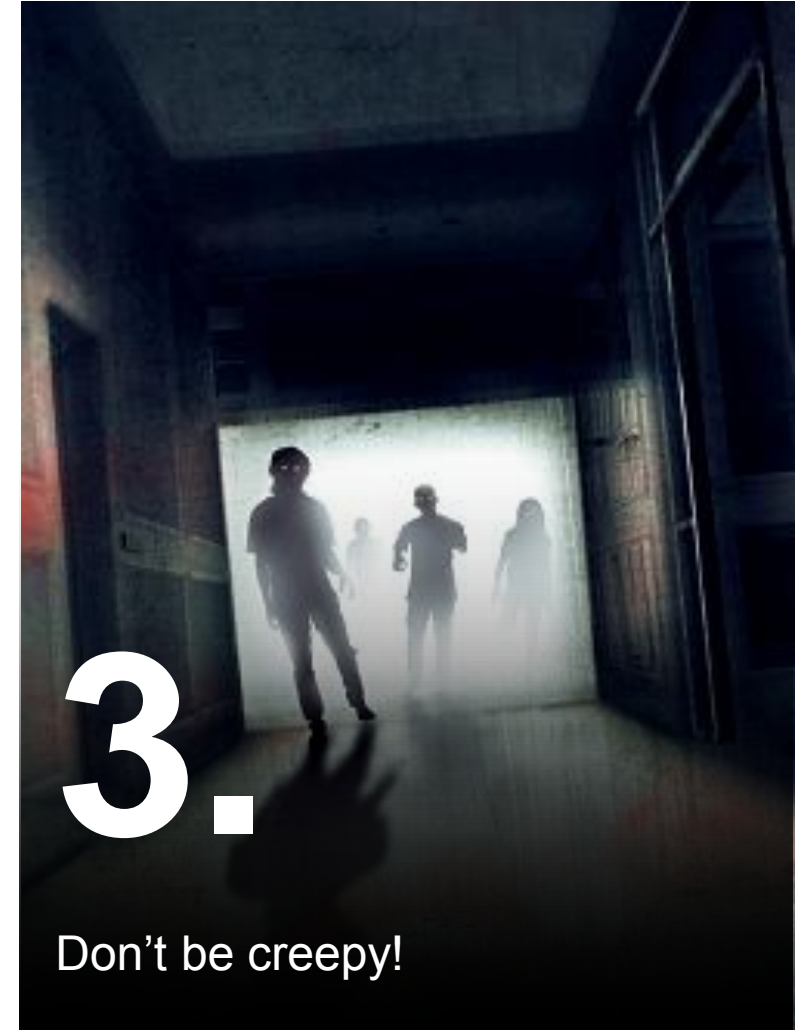
Do they believe that you will use their data well, or use it to chase them around the internet?

Implication: respect and precision are key

3 recommendations to leave you with

1.
Build data advantage

2.
Measure everything

3.
Don't be creepy!

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Thank you