

# **SAP Consumer Insight 365**

**Kevin Outcalt**

**VP, Mobile Analytics & Consumer Insight**



# Unlocking and monetizing mobile consumer data

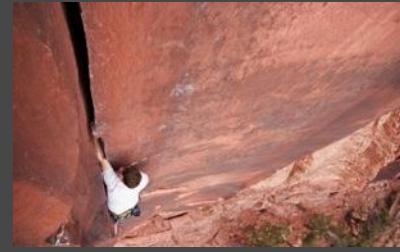


We live mobile centric lives dominated by Big Data.

**7.5 B** connected devices  
**1.5 B** smartphones.  
**1.7 ZB+** traffic going through the cloud.



Mobile Consumers value relevance and context, but businesses are working in the dark. **\$500B** spent on advertising annually – only **2%** is spent on mobile



Mobile operators have the potential to be empirical source of insight, but are trapped by scale of data in their networks – up to **30TB** a day



**SAP Consumer Insight 365, powered by SAP HANA** unlocks the value of this data. Delivering new revenue streams and consumer value, while maintaining the highest levels of protection for individual consumer privacy

# Industry background

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**For many years Market Research and Analytics Companies, Media Companies and Brands have worked with traditional sampling methods of monitoring and measuring the changing behaviour in consumers brought about by the proliferation of smart devices.**

**When all along carriers have had within their networks a more holistic empirical source of consumer behaviour, insight and market intelligence.**

# Big data and the role of mobile networks

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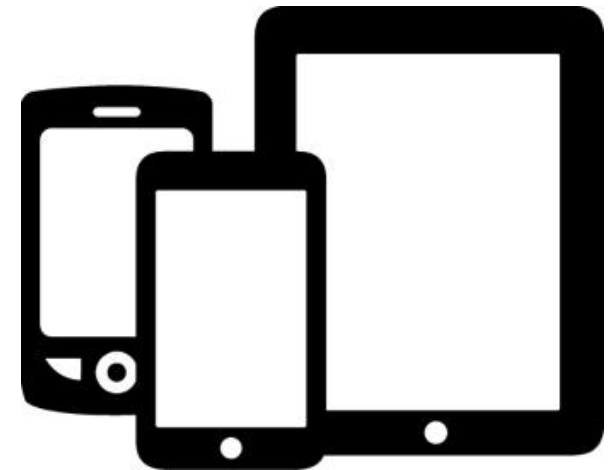
**There are quite a lot of these**



**There's even more of these...**



**... and increasingly more of these**



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**Now SAP Mobile Services is throwing new light on consumer behaviour delivered through our new SAP Consumer Insight 365 Service**

# A wealth of new data





# The Buyer


Who wants to buy consumer insight





# Target sectors

 Advertising

 Media

 Retail

 CPG (CP/FMCG)

 Travel and Leisure


 Broadcast


 Brands


 Market Research


 Analytics Companies


 Sports and Entertainment

 Financial

 Government

 Public sector

 Carriers

 Education

## Primary targets



# WPP – Kantar global business – global brands

By uniting the diverse talents of its **13 specialist companies**, the group aims to become the pre-eminent provider of compelling and inspirational insights for the global business community.

Its **28,500 employees** work across **100 countries** and across the whole spectrum of research and consultancy disciplines, enabling the group to offer clients business insights at each and every point of the consumer cycle.

The group's services are employed by **over half of the Fortune Top 500 companies**. **Who also have a global business footprint**

KANTAR OPERATING COMPANIES & THEIR LOCATIONS AROUND THE GLOBE



ADDED VALUE  
CENTER PARTNERS  
IMRB INTERNATIONAL  
KANTAR HEALTH  
KANTAR JAPAN

KANTAR MEDIA  
KANTAR OPERATIONS  
KANTAR RETAIL  
KANTAR WORLD PANEL

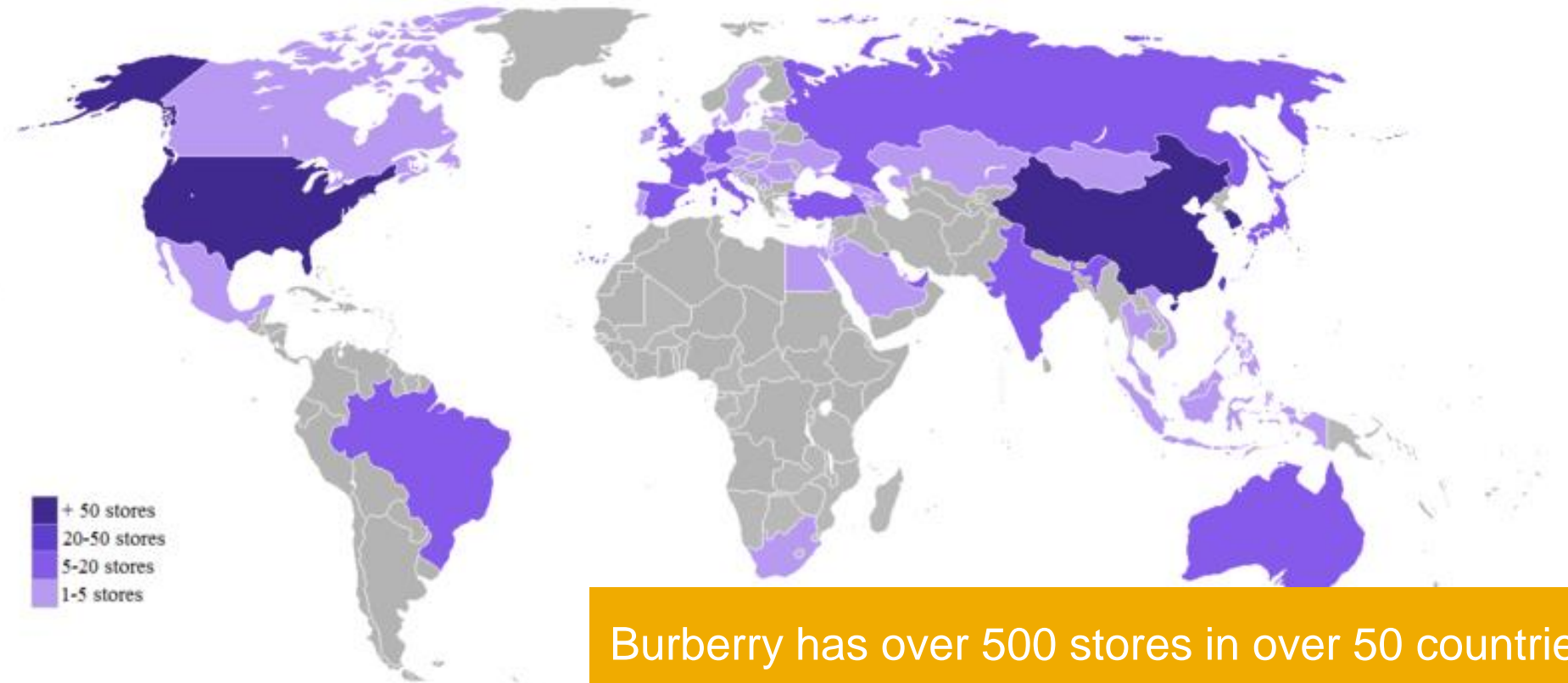
LIGHTSPEED RESEARCH  
MILLWARD BROWN  
THE FUTURES COMPANY  
TNS

**UK** (London), **France** (Paris), **Spain** (Barcelona and Madrid), **Italy** (Milan), **Germany** (Nuremberg & Hamburg), **Poland** (Warsaw), **Russia** (Moscow), **South Africa** (Cape Town and Johannesburg), **USA** (New York, Los Angeles, and San Francisco), **Australia** (Sydney), **China** (Hong Kong, Beijing, Guangzhou and Shanghai), **Singapore** and **The Philippines** (Manila).

Additional companies  
Compete, Millward Brown

Kantar is also a WPP company

# Global brands also expect a global service



Burberry has over 500 stores in over 50 countries

# Large in country brands also expect a broad national service



# The Buyer

What are they asking for

# Service and Business case



- A fast scalable service
- Consistent Data sets and attributes
- An open data source not productised packages
- Global Demographic profiling
- A globally accessible portal
- Global personal data privacy management
- Global data governance and in country policy management
- Consistent data output formats
- Flexible access packages



- Single point of Business contact
- Single point of Connection & Contract
- Common interface
- Global pricing
- Single point service enablement and delivery
- API connectivity into in-house BIS and planning tools
- Global upgrades maintenance and support



# What do they expect the data to deliver

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**Through a highly flexible portal, data can be analysed in an infinite number of ways delivering solutions or contributive analytics to support many requirements. The data will be provided in a consistent format at an agreed frequency.**

## **For example**

Footfall related research

Motion mapping

Out of home behaviour

App ranking

Web browser ranking

Device profiling & penetration

Geo-demographic profiling

Event based research such as the Olympics

Path to purchase to support 'interrupt' initiatives

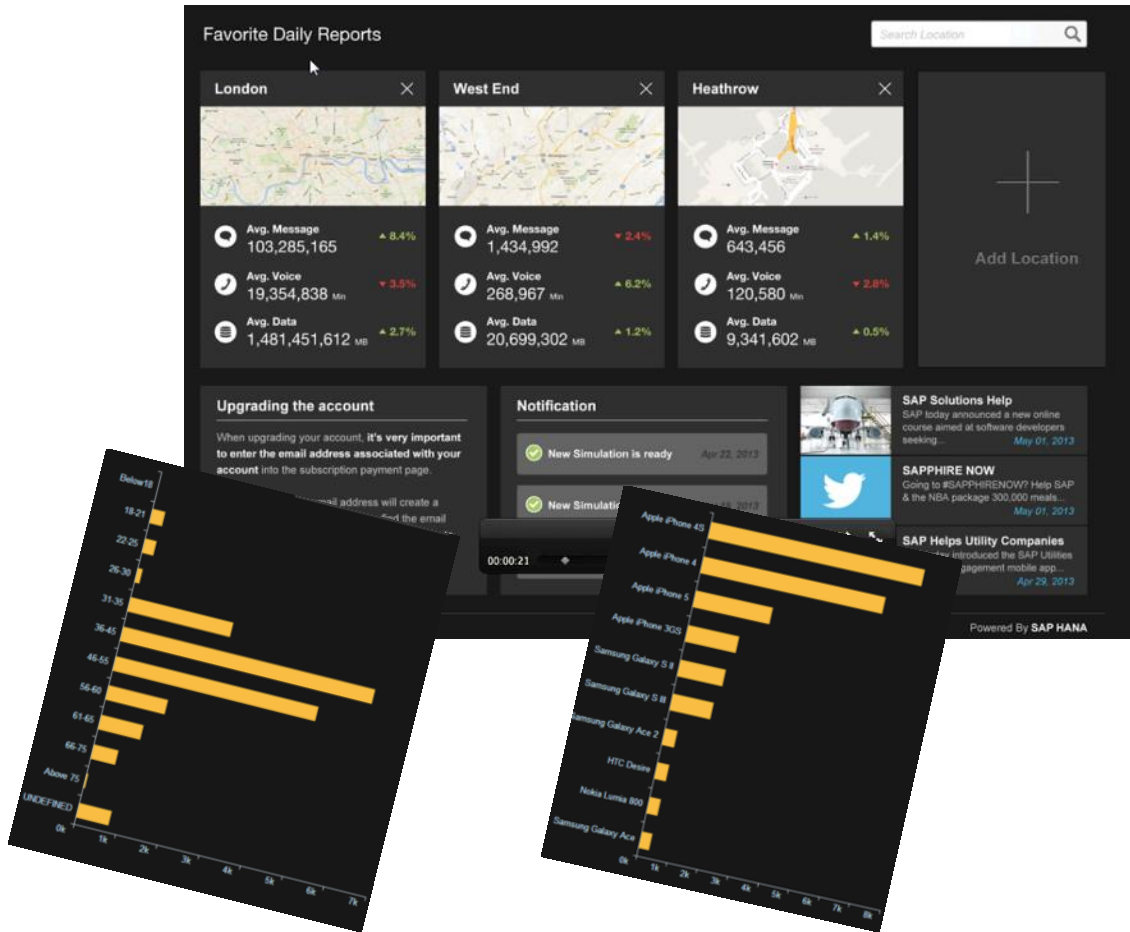
Consumer segmentation mapping

# The Operator

What's the key benefits to the operator



# Global solution, global portal



Third party Monetisation of data assets

In house use to deepen subscriber profiling and targeting

SAP HANA, Analytics

Largest Provider in the Cloud

Support to accelerate accessing network data

# Global customers, global sales force

Fast time to market and revenues

238,000 customers 25 countries  
6,000 strong global sales force

SAP customers represent **86%** of Global Fortune 500 companies.

SAP customers represent **98%** of the top 100 most valued brands in the world.

SAP helps reliably reach more than **97%** of the world's wireless subscribers via text messaging.

Sales and marketing

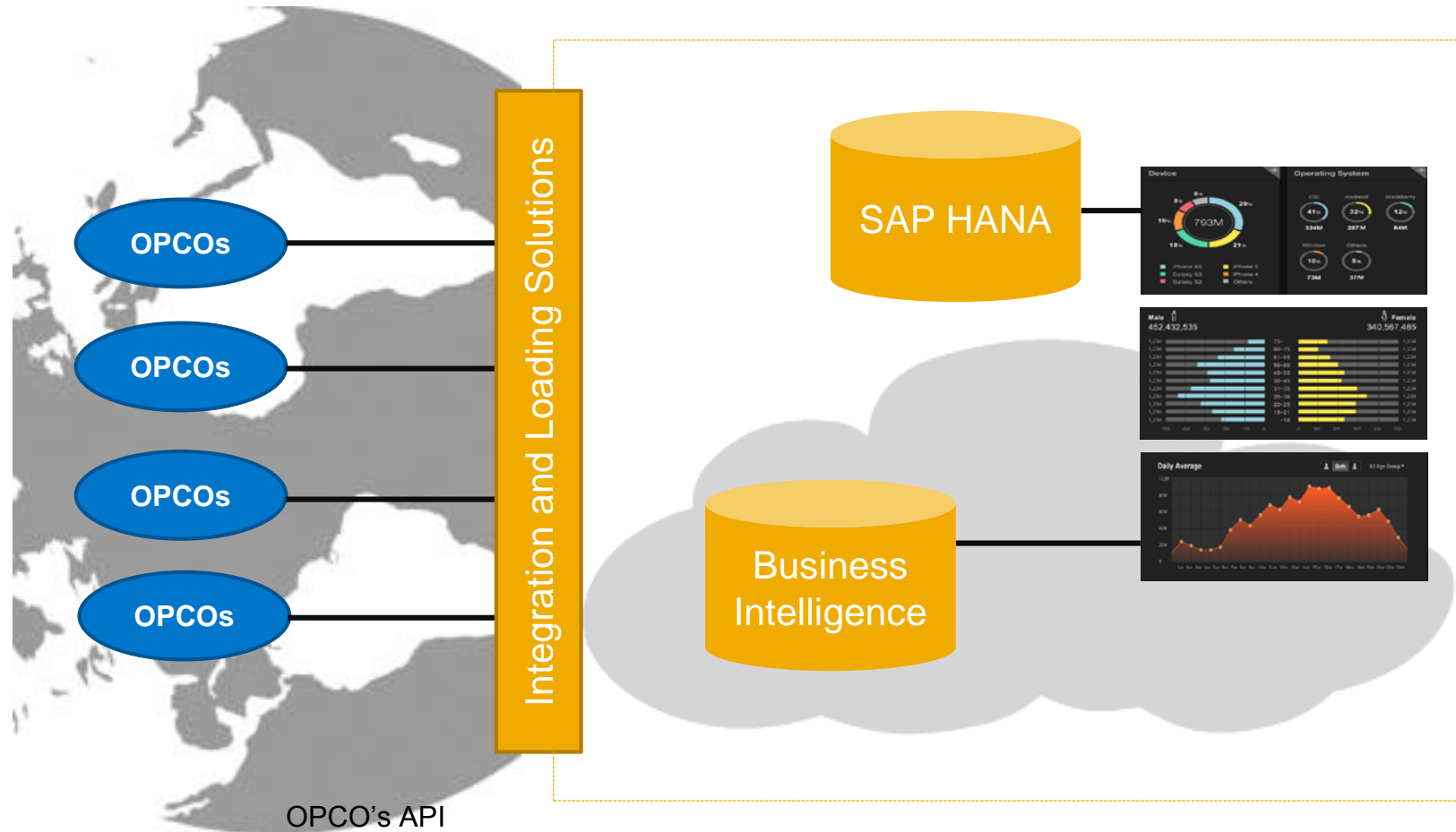
Home	74% revenue	Consumer Purch.	Fortune 500	Top Brands	80% SME's	Bus One go live	Product Safety	Mobile	Texts/Day	HA
	HANA OncoLyzr	Beauty/Fragrance	Food Dist.	Work from Cloud	UN Govt. Cust.	Population	Diversity	Stock Analytics	Sustainability	Me
	Healthcare Dist.	Automobiles	Air Travel	Pet Food	Televisions	Bank Accounts	Jeans	Ice Cream	Prescriptions	Coffee & Tea
	Arriba network	Greeting Cards	Movies	Motorcycles	Broadcasting	Chocolate	Footwear	Beer	Toys & Games	Oil Production

⊛ This fast fact is based upon a review of the 2012 *Fortune* 500 list and identifying companies that are customers. The Top 10 are all customers Top 5: Royal Dutch Shell, Exxon, Walmart, BP and Sinvoc.

⊛ ⊛ This fast fact is based upon identification of SAP customers on the Interbrand ranking list. The Top 5 are customers: Apple, Google, Coca-Cola., IBM, Microsoft Note: SAP is #25 on this list

# The Service

# SAP Consumer Insight 365 service



## Business and Technical Resources

Analytics DBs storage, retrieval and distribution

Geographic and cultural governance

- Meets all data protection and consumer privacy rules

Reporting and analytics tools

- Custom visual data dashboards
- Dynamic access
- API

# Consumer data

## Macro Level Data

No permission, anonymised data at an individual level from the total active subscriber base

Aggregation if enforced subject to national, regional, and operator requirements

## Micro Level Data

Client

- Consumer insight 365 will have the ability to upload opted in consumer lists taken from a clients own panel members or permission based loyalty programmes.

Operator

- Opted in permission based subscribers. Used as a single source or used to augment client panel members

## We can see

- A person (anonymised)
- Gender
- Age
- Device (make, model, and OS)
- Home locator
- Activity locations
- Activities – web browsing, (Site, App), text, call
- Socio-demographic profile
- Time



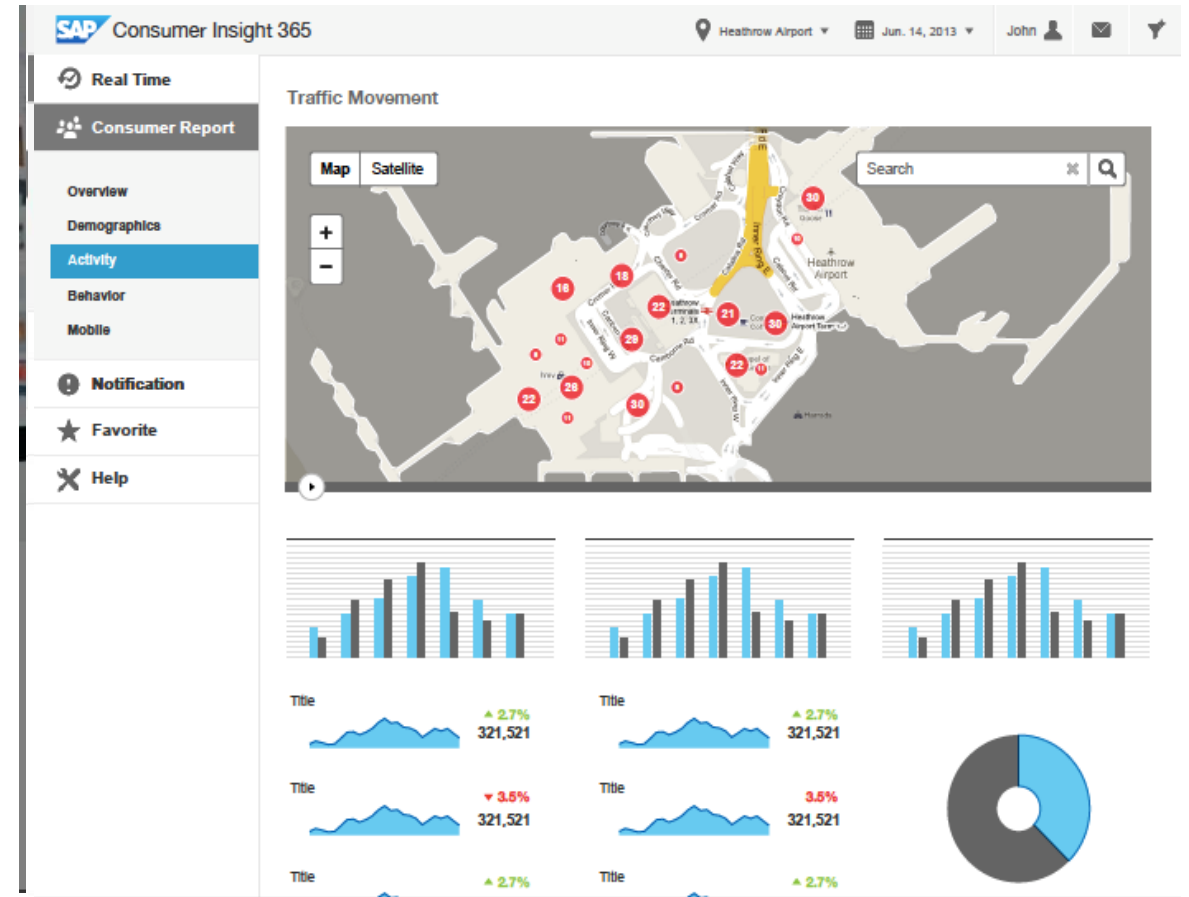
# In action

## Portal

- A cloud based managed service, powered by SAP HANA
- Accessed through a smart searchable portal
- Fast intuitive service packages and simple subscription models

## API

The service also has the facility to deliver specified data feeds subject to contractual agreements through direct secure API connectivity





# Out of home: Enhancing shopping experience, out of home behaviour



**121,343\*** customers identified between 9am and 9pm

**24%** customers using mobile web/ apps

**7%** commerce based

**4.5%** mCommerce only 53 different sites

**2.5%** physical retailer 83 different sites

\* One operator network  
Oxford circus, Regent street, Bond street

# Location and motion patterning

## Inputs

- Near Real time tracking
- Home to destination travel patterns
  - To place or event, somewhere else, home
- Geo-fencing
  - TV / Radio / press / outdoor DM regions, ...
- Location / Journey activity
- Web browsing
- App activity
- Footfall
- Dwell time
- Social media
- Text, Calls



## Outputs

- Movement trends – are people migrating to a competitor a competitor?
- Time and demographic appeal – is a competitor more attractive to certain groups of people at certain times?
- Predictive analysis – modelling the most effective ways to attract and retain footfall based on past observations
- Location Visuals and Animations
  - Provision of map based demographic information, static, or time series animation



# Significantly increasing the visibility of who is doing what, where, when on what device and for how long

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**How many** 25 year old females enhance their shopping experience at lunchtime?

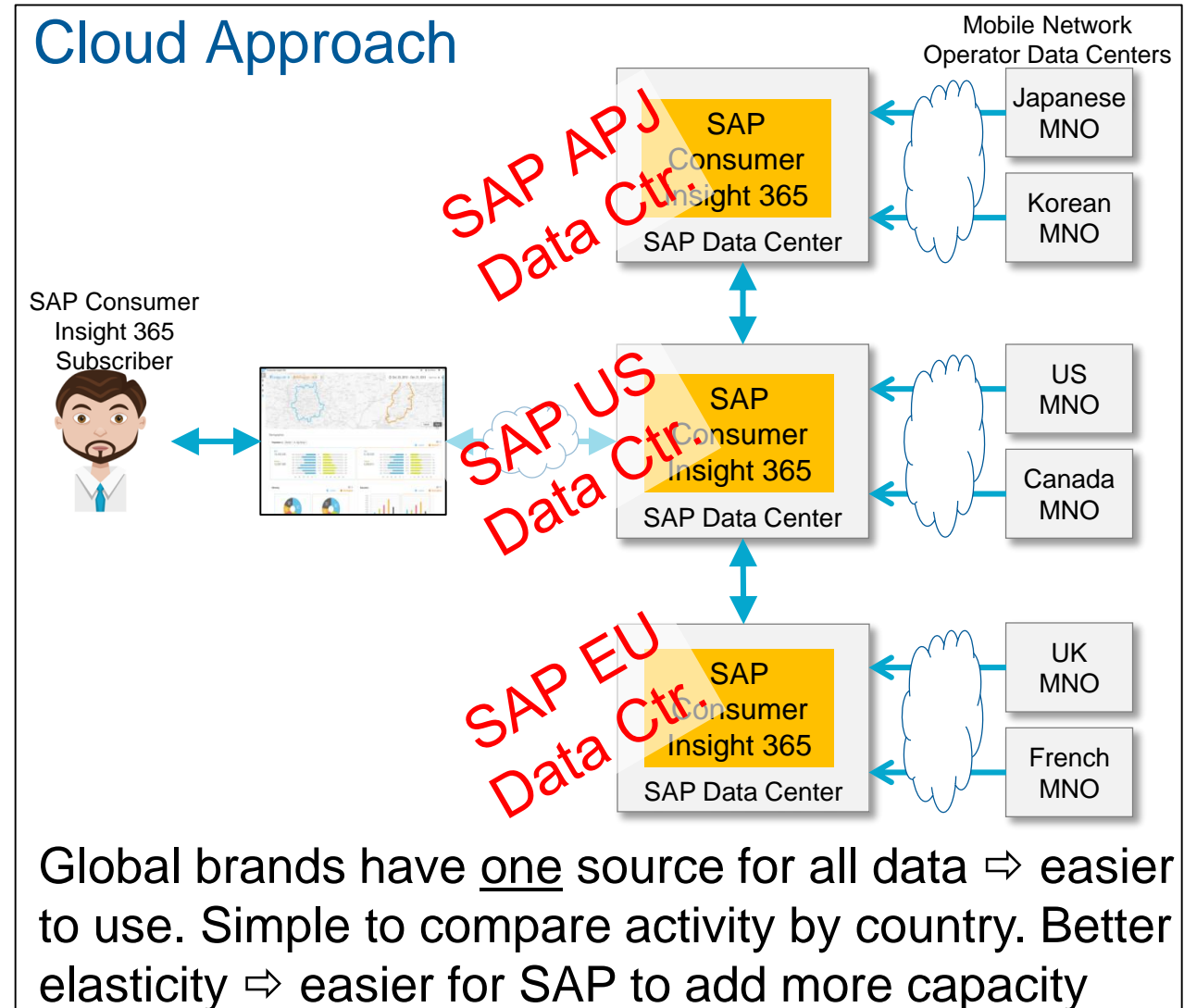
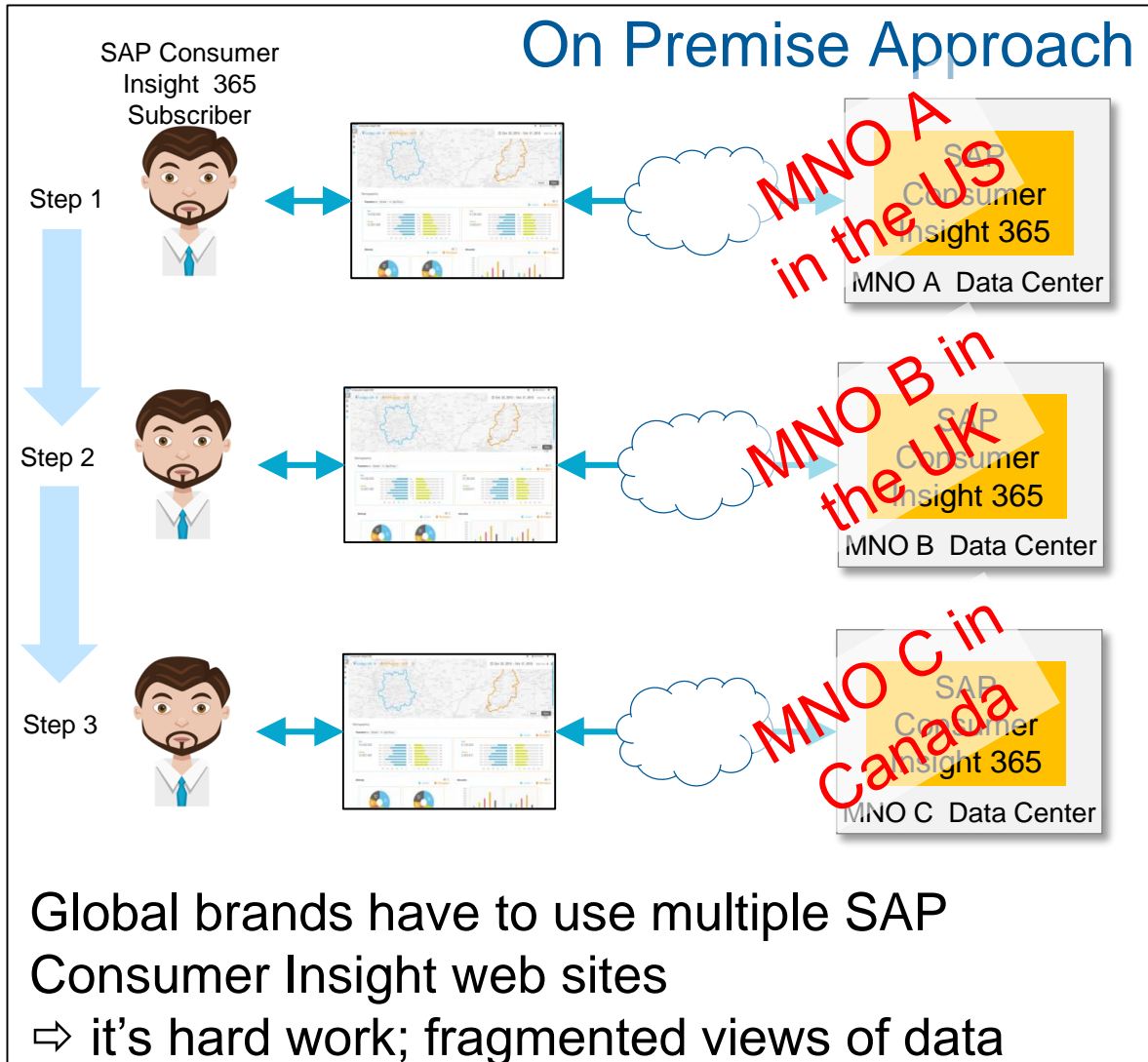
**How many new devices** have been activated this month. What are the top 100 apps?

**Did a recent mobile media campaign** deliver its expected ROI?

**How many** foreign visitors attend an exhibition?



# Cloud vs. On Premise – what the user wants



# How SAP Consumer Insight 365 in the Cloud works

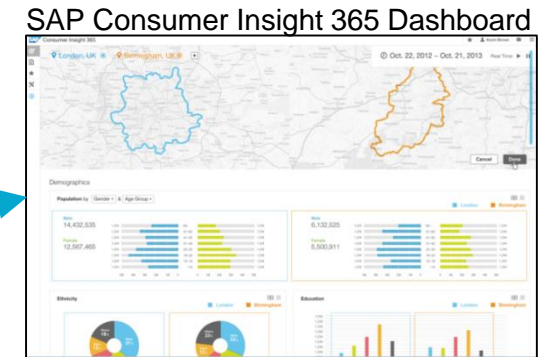
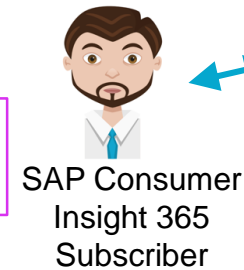
## The Mobile Network Operator (MNO) Mediation Zone

- Extracts data from MNO's existing information/operational systems
- Anonymizes the data ⇒ SAP can't identify individuals
- Periodically sends batches of data to SAP

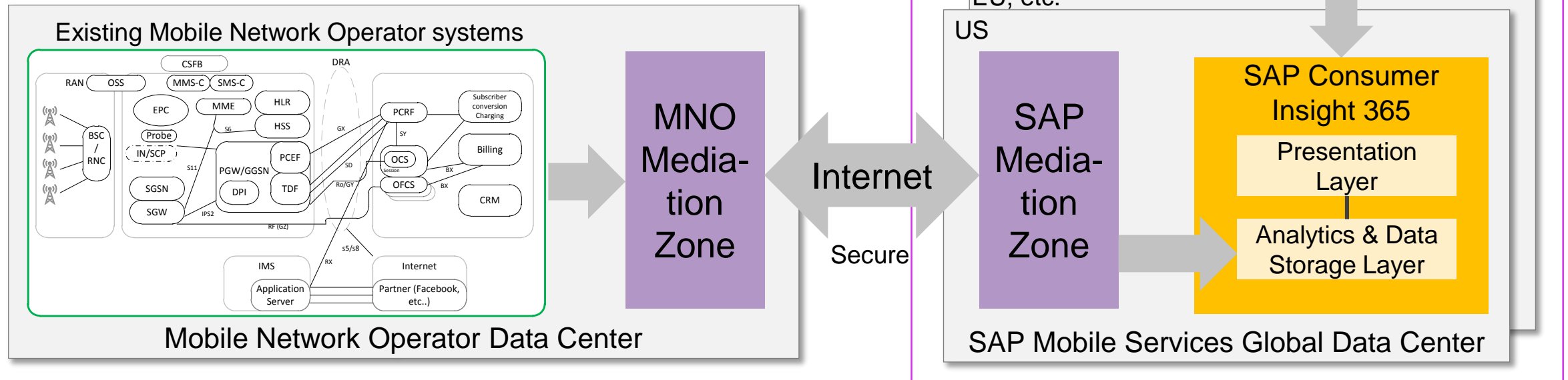
## The SAP Mediation Zone

- Checks & loads data into SAP Consumer Insight 365
- Makes it available for analysis to SAP Consumer Insight 365 subscribers

SAP owns & operates this



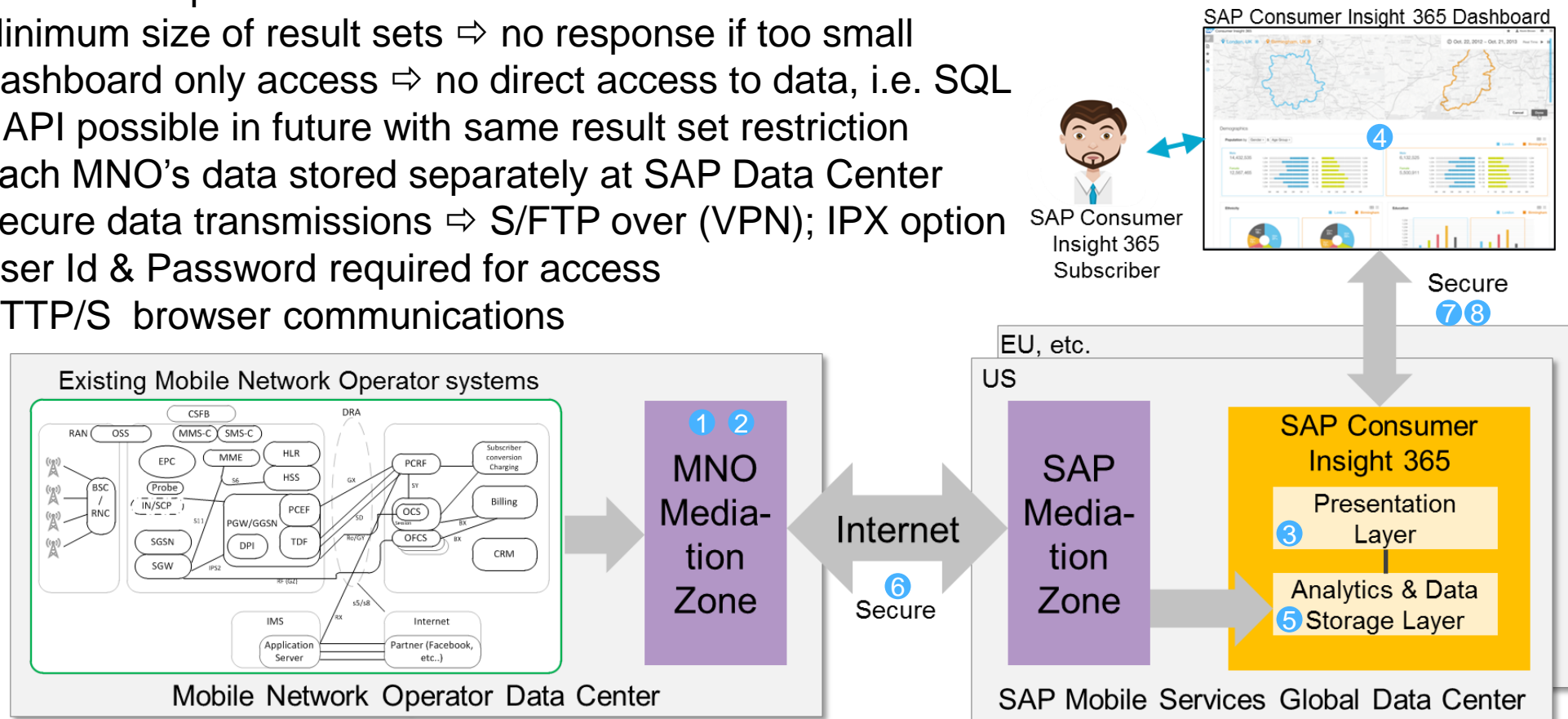
Secure



# Cloud SAP Consumer Insight 365 security features

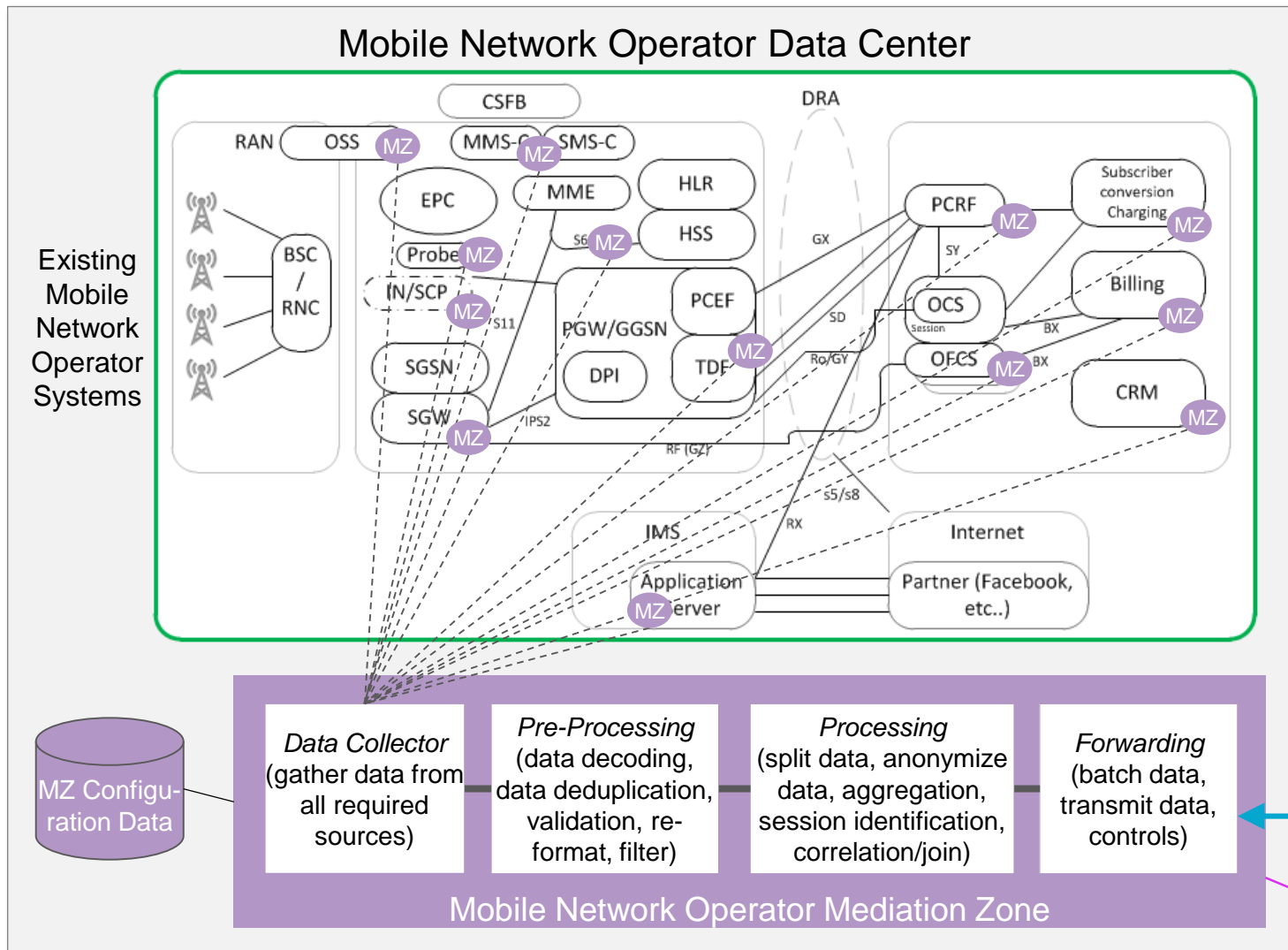
Security features include:

- 1 Strong encryption of sensitive fields (MSIN, IMEI and Account Numbers)
- 2 Truncated Zip/Postal codes for Home Location
- 3 Minimum size of result sets  $\Rightarrow$  no response if too small
- 4 Dashboard only access  $\Rightarrow$  no direct access to data, i.e. SQL – API possible in future with same result set restriction
- 5 Each MNO's data stored separately at SAP Data Center
- 6 Secure data transmissions  $\Rightarrow$  S/FTP over (VPN); IPX option
- 7 User Id & Password required for access
- 8 HTTP/S browser communications





# How a Mobile Network Operator (MNO) Mediation Zone works



Mediation Zones collect, process data from MNO systems then sends to SAP

- High quality, complete & timely data critical
- Significant effort to build, test and operate

SAP's CI 365 Mediation for MNOs

- Free license for MNO to use (incl. support)
- Pre-built & tested with CI 365
- Faster, lower risk implementation
- Updates from SAP for MNO to apply
- SAP accepts responsibility for problems with anonymization (not the MNO)
- MNO costs: Initial integration + hardware / data center operational costs

Secure Transport to SAP CI 365 Mediation Zone running at SAP Global Data Center

SAP can provide an MNO with a pre-built, tested Mediation Zone (see above)

# The Partnership Opportunity

# Market Opportunity

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**Estimated that mobile operators will spend \$23B per year by 2017 on mobile usage data analytics and monetization systems. (GoGlobal, McKinsey)**

**Provides competitive advantage to Huawei radio network switching, core and value added nodes, and data management and other infrastructure systems**

**Provides mobile operators the ability to address a \$100B+ market for mobile usage data and insights (McKinsey)**

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