#Touchpoint: optimizing impact on Brand, Experience & Sales

Seminar

Milan, 12th October 2016

TNS Italia
@TNS_Italia
#Touchpoint
TNSItaliaVideo
Agenda

9.30  Welcome and opening
9.40  **Optimising marketing in a connected world**
9.50  **Everyday challenges in managing touchpoints**
10.05 **Navigating digital touchpoint revolution**
10.30 **Micro-moments in the Auto path to purchase**
10.50 **Customer experience in a multichannel world – Telco providers**
11.15 Coffee break & Interactive Sessions
  - "I-Want-to"moments in the Customer Journey Monitoring cross device experience
  - Social Engagement matters: Euro 2016 Coca-Cola Twitter campaign - case history
  - Beyond e-commerce: new touchpoints creating value for brands
12.30  **Sum up / Marketing in a connected world**
13.00  Light lunch

Federico Capeci, CDO & CEO Italy, KANTAR TNS
Walter Caccia, Head of Brand & Comm, KANTAR TNS
Niels Neudecker, Head of Connect Excellence Centre, KANTAR TNS
Angelo Liverani, Head of Auto & Luxury Brand, Google
Leda Riva, Head of Customer Strategies, KANTAR TNS
Angelo Liverani, Head of Auto & Luxury Brand, Google
Bruna Nania, Social Media Manager Italy, Coca-Cola
Stefania Rosselli, Business Unit Director, Mediacom
Marina Guida, Head of vertical Sales, Amazon
Federico Capeci, CDO & CEO Italy, KANTAR TNS
Optimizing marketing in a connected world

Federico Capeci
Chief Digital Officer & CEO Italy, KANTAR TNS
Context is getting mobile-centric and the last remaining PC markets are slowly migrating to mobile

Device centricity

time spent on mobile and tablet daily

Connected Life

- 57 Countries
- 70,000+ interviews
- Represents 91% of world internet population with regular access/weekly

Former PC-centric markets that have become multi-device in the past 12 months

Connected Life
1. This offers to brands the chance to create rich customer experiences across multiple platforms

<table>
<thead>
<tr>
<th>Weekly online activities</th>
<th>45-54s</th>
<th>16-24s</th>
</tr>
</thead>
<tbody>
<tr>
<td>Messaging</td>
<td>✔</td>
<td></td>
</tr>
<tr>
<td>Read articles</td>
<td>✔</td>
<td>✔</td>
</tr>
<tr>
<td>Social networking</td>
<td>✔</td>
<td>✔</td>
</tr>
<tr>
<td>Emails</td>
<td>✔</td>
<td>✔</td>
</tr>
<tr>
<td>Video – posted by friend</td>
<td>✔</td>
<td>✔</td>
</tr>
<tr>
<td>Video - free</td>
<td>✔</td>
<td>✔</td>
</tr>
<tr>
<td>Video - on social</td>
<td>✔</td>
<td>✔</td>
</tr>
<tr>
<td>Mobile/tablet games</td>
<td>✔</td>
<td>✔</td>
</tr>
<tr>
<td>Upload photos/videos</td>
<td>✔</td>
<td>✔</td>
</tr>
</tbody>
</table>
2. Luxury of choice makes people more discerning about the media they consume

Daily media use - Global

<table>
<thead>
<tr>
<th></th>
<th>Offline</th>
<th>Online</th>
</tr>
</thead>
<tbody>
<tr>
<td>Print media</td>
<td>30</td>
<td>47</td>
</tr>
<tr>
<td>Radio</td>
<td>27</td>
<td>30</td>
</tr>
<tr>
<td>TV</td>
<td>74</td>
<td>65</td>
</tr>
</tbody>
</table>

- Offline activities: 30% Print media, 27% Radio
- Online activities: 47% Online articles, 30% Online audio, 65% Online video

Source: (C1) Frequency of online activities – Daily | (D1) Device and media usage – Base: All respondents (74404)
No endless budget: we need to prioritize
3. Understanding what customers want through different channels is the challenge for Marketers

<table>
<thead>
<tr>
<th>Customer needs:</th>
<th>Entertainment content</th>
<th>Information about products/services</th>
<th>Ask questions</th>
<th>Share opinions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Customer needs:</td>
<td>Brand building</td>
<td>Brand activation</td>
<td>Customer service</td>
<td>Brand advocacy</td>
</tr>
</tbody>
</table>

Connected Life
4. People are conflicted about the relevance of brand content, with poor execution leading to feelings of being ‘stalked’

Top 2 box agreement %

38% I enjoy reading and watching content from brands on social

34% I feel constantly followed by brand advertising online
Which in turn leads to usage of ad blockers, eroding ad spend

18% Using an ad blocker

86% Reading articles online
Integrated marketing in an increasingly connected world

- Align Brand experience through touchpoints
- From reach to effectiveness
- Multiple roles for touchpoints
- Moment that matter and relevant contents
Thank you

Federico Capeci
Chief Digital Officer & CEO, KANTAR TNS

Federico.Capeci@kantar.com
Everyday challenges in managing touchpoints

Walter Caccia
Head of Brand & Communication, KANTAR TNS
Managing touchpoints holistically is one of the biggest challenges for companies today. Of companies acknowledge the importance of touchpoint management will increase in the future...yet only 7% feel they have a satisfactory approach.
Top touchpoint challenges

1. There are so many of them and every touchpoint has the potential to influence

2. Consumers expect a seamless experience regardless of where they choose to interact with a brand. Touchpoints need to be multi-tasking

3. Measuring impact & effectiveness beyond reach
Dealing with the fragmentation of touchpoints
https://www.youtube.com/watch?v=nkLY3GOU0tc
Every experience has the potential to influence
Each touchpoint contributes to the experience of a brand

Store experience and staff behaviour

Billboard

Product experience

Outside advertising

Social commentary/word of mouth

News from Apple’s Worldwide Developers Conference (WWDC)

TV advert

Website
The minority of touchpoints have the majority impact
Breaking down silos
Integrated Marketing is a capability, not a department

Most silos are self-imposed and counter-productive

Media
Functions
Brands
Industries
Consumers do not sit in silos
Social is now playing a role throughout the customer journey

Find out information 39%
Access branded content 62%
Ask a question 32%
Express an opinion 48%
Use the right tool for your job

1. WoM family & friends
2. Recommendation by sales staff
3. TV ads

Driver for brand equity

1. Promotion stands in supermarkets
2. Coffee used in gastronomy
3. Social Media

Driver for sales

1. Radio ads
2. Print ads
3. Online ads

Driver for both
3
Measuring impact & effectiveness beyond reach
Old belief

Our memory operates like a video camera
New belief

Memory is a continually updated reconstruction of the past
Reach & Frequency

Engagement
Focus on quality of engagement, not just reach

Top Touchpoints: client brand
1. Shelf presence in supermarket
2. Own product experience
3. TV advertising
4. WoM family & friends
5. Coffee used in gastronomy
6. Print ads

Performance vs competitors
- Better than competitors
- Equal to competitors
- Worse than competitors
It’s all about... finding new ways to measure engagement and...
...reducing complexity and find the moments that matter the most
Thank you

Walter Caccia
Head of Brand & Communication, KANTAR TNS

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Navigating the digital touchpoint revolution

Niels Neudecker
Head of Connect Excellence Centre, KANTAR TNS
Ø 83 per day
We spend in average 5 hours per day on digital devices. Around 50% of our time on smartphone and tablets.
Case study: Digital tooth paste
real data, fake brands

„FlashWhite“
„DigiDent“
„BeaverBite“
FlashWhite is strongest toothpaste brand in market
6.0% of 33.6% brand equity results from recent brand experiences
43 touchpoints in 5 dimensions

Digital
1. Customer reviews (Blogs, Forums)
2. Product name in search engine
3. Problem solution in search engine
4. Video ad on Facebook newsfeed
5. Video shared by friends online
6. Video ad on Youtube
7. Ad banner on website/internet
8. Promotions/Coupons online
9. Retailer Websites
10. Brand Website
11. Brand Fan Page
12. Online Blogs & Forums

Recommendations
13. Advice promotion person in store
14. Advice salesperson in supermarket
15. Advice salesperson in pharmacy
16. Advice from dentist
17. Recommendation from friends/family
18. Advertising toothbrush producers
19. Product sampling buying a toothbrush
20. Recommendation in Consumer magazines

Promotions
21. Product sampling in store
22. Promotion offer on pack
23. Promotion leaflets in store
24. Promotion leaflets in letterbox
25. Coupon at the shelf
26. Coupon in Magazines/Newspaper
27. Promotional poster at store entrance

Point of Sale
28. Promotional poster at store entrance
29. Displays outside the shelf
30. Posters hanging from shop ceiling
31. Floor graphics
32. Advertising on trolley
33. Advertising at shelf
34. Video in store
35. Radio in store

Traditional Advertisement
36. TV advertising
37. TV sponsorship
38. Ad in Cinema
39. Ad on Radio
40. Ad in Magazines
41. Ad in Newspapers
42. Ad on Billboards (fix + rolling)
43. Ad in/at public transports
DigiDent: the digital toothpaste
Digital touchpoint contribute most to DigiDent’s brand equity
Touchpoint playing together
If TV ads and WoM are experienced together, WoM largely benefits
Touchpoint synergies
Digital is essential part of integrated marketing
4 Learnings on integrated marketing

Learning 1
Big brands also have troubles with digital

Learning 2
Integrated marketing generates synergies for brand growth

Learning 3
Traditional advertising can be booster for integrated campaigns

Learning 4
66% of all touchpoint experiences happen before purchase and digital is an essential part of it
Thank you

Niels Neudecker
Head of Connect Excellence Centre, KANTAR TNS

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Micro-moments in the Car buyers purchase process

Angelo Liverani
Head of Auto & Luxury Brand, Google
Micromoments in the car buyers purchase process
Auto buyers skew high for these digital behaviors

Question asked: Q6: How often do you use the internet for private purposes? / Q12Nv1: How often do you use a smartphone? / Q16_1_4: How often do you use the internet via your devices?

*Metric based on usage of smartphones, tablets, computers, connected media players, eReaders and Smart TVs

Base: 1) Local car purchaser 18+, n = 94; 2) Private online users 18+ who purchased a car within the past 12 months n = 85

Source: CCS 2016
Three mega trends affect the auto path to purchase

Online: Research online - 96%
Mobile*: Research on their smartphone - 66%
Video: Watch online video - 78%

Definition key values: Online research Q9/10/11; aggregated results // Research on smartphone Q21 // Online video Q11, aggregated results
Q9: Which of these online information sources informed or influenced your recent vehicle purchase, at any stage?, Q10: Which of these websites or apps did you use?, Q11: On which of these websites or apps did you watch online videos?, Q21: Which of your devices did you use at any stage of your online research?
Source: Auto CB 2016
Auto shoppers invest a lot of time and effort in their research

39%
explored more information sources compared to previous new car purchases

Question asked: NQ24 - Attitudes about pre-purchase phase - How would you describe your research for your new vehicle?
Base: New Car Buyers who were randomly selected for this question (reduced sample), n = 265
Source: Auto CB 2016
Important questions are answered in micro-moments

Some look on their smartphone for information about a new car in-between tasks; between organizing the morning and going to work

While waiting or commute picking up a smartphone – to kill time or use this moment to research for interesting products

And sometimes others tell something about new cars – and one immediately checks this on a smartphone

31% of new car buyers look for information in-between tasks

44% of new car buyers researched for their new car while commuting or waiting

22% of new car buyers researched something they heard from others

Question asked: NQ21 - Contextual research patterns on smartphone - In which situations did you do research on your smartphone for your new vehicle?
Base: New car buyers who researched on their smartphone and who were randomly selected for this question (reduced sample), n = 168

Source: Auto CB 2016
Smartphone usage has clearly grown, too.

- **2012**: 37%
- **2016**: 84%

Question asked: Q12Nv1: How often do you use a smartphone?
Base: Private online users 18+, 2012: n = 701, 2016 n = 754
Source: % of people 18 years and older who use a smartphone; CCS 2012 / 2016
Today’s journey is made of milestones and moments

It’s Time for a New Car → Getting on the Short List → From Digital to the Dealership → Customer Loyalty

“Which car is best?”

“Can I afford it?”

“Am I getting a deal?”

“Is it right for me?”

“Where should I buy?”
Information needs differ between first time and repeat buyers

<table>
<thead>
<tr>
<th>Moment</th>
<th>% of FIRST time buyers</th>
<th>% of REPEAT buyers</th>
</tr>
</thead>
<tbody>
<tr>
<td>PROMOTIONS, DEALS, ETC.</td>
<td>84%</td>
<td>79%</td>
</tr>
<tr>
<td>VEHICLE STICKER PRICE</td>
<td>37%</td>
<td>61%</td>
</tr>
<tr>
<td>PROJECTED RESALE VALUE</td>
<td>17%</td>
<td>19%</td>
</tr>
</tbody>
</table>

Question asked: NQ6 What information did you look for before you went to the dealership?
NQ9 / NQ10 / NQ 11 What information did you look for during your product research at any stage?

Aggregated information needs per moment (net counts)
Base: New car buyers who actively looked for information in this moment and who purchased a vehicle for the first time / are repeat buyers, n = 123 / 257
Source: Auto CB 2016
1 out of 3 of luxury car buyers is completely decided at the start

<table>
<thead>
<tr>
<th>Completely decided</th>
<th>Somewhat decided</th>
<th>Completely undecided</th>
</tr>
</thead>
<tbody>
<tr>
<td>33%</td>
<td>62%</td>
<td>4%</td>
</tr>
</tbody>
</table>

Question asked: Q34 - Decisiveness about make & model - How would you describe your certainty at the start of the vehicle purchase process?
Base: New car buyers, n = 527, New luxury car buyers, n = 66
Source: Auto CB 2016

Versus only 1/5 of the average auto shoppers

<table>
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<th>Somewhat decided</th>
<th>Completely undecided</th>
</tr>
</thead>
<tbody>
<tr>
<td>20%</td>
<td>64%</td>
<td>12%</td>
</tr>
</tbody>
</table>
High income people are using more connected devices

**Age 18+ IT population**

**Avg population**

2.9

**High Income**

3.1

# of connected devices used on average

Metric based on usage of smartphones, tablets, computers, connected media players, eReaders and Smart TVs

Base: Private online users 18+, Avg 2016 n = 754, High Income n = 120

Source: CCS
Today’s Auto shoppers are digitally savvy & visit the dealership less, instead relying on online research, mobile & video to stay informed and make decisions.

To reach & engage with the digital Auto shopper, we must think in terms of consumers’ micro moments of influence.

Purchase paths vary in length & process, but typically the journey begins online -- with search & online video as key influencers across phases.

The smartphone is the anchor to micro moments. Invest in the mobile consumer in proportion.

Step in to fill the void. Everywhere the consumer looks for information, there is an opportunity to engage them.

Build search programs & deliver video content to respond to customer needs at all phases & moments.

The modern Auto shopper walks into the dealership armed with a staggering array of information. Delivering on research needs & inspiring consumers is critical -- brands that succeed will win the sale!

Every brand interaction leaves an impression. Invest in the experiences that set your brand apart.
Thank You!
Thank you

Angelo Liverani
Head of Auto & Luxury Brand, Google

a.liverani@google.com
Customer experience in a multichannel world – Telco providers

Leda Riva
Head of Customer Strategies, KANTAR TNS
Customers’ journeys - the opportunities to deliver memorable experiences

Making contact
Why, how often and how do customers get in touch with their provider?

Response
Do customers receive a response?
How does impact vary by reason for contact and used channel?

Channel switch
Why do customers switch channels for one and the same request?
What is the impact on the relationship?

Solution
What is the impact of an unsolved service request?
... with the help of Customer Insight survey 2016

Use and evaluation of service channels and implications for customer management

- 13 Countries
- 2 Industries: Mobile providers / Retail Banking
- Approx. 37,000 Interviews
- Adults (18+), Internet users
Making contact in an ever more complex world of customer service
In the course of one year, the majority of customers directly contact their mobile operator only once.

- Ask a question/request information: 40%
- Close / Alter / Extend a contract: 45%
- Complain about the network / handset: 12%
- Complain about other reasons: 3%
- Other …: 4%
... but customers have more service channels available than ever before

**Newer digital service channels**
Fast emerging - Twitter, WeChat, Facebook, other social media sites and mobile app

**Legacy digital service channels**
Already established – email, company’s website contact form, chat and forum

**Traditional offline service channels**
Still important to customers - store/kiosk, service hotline, written letter and fax message
In the **proactive contact** traditional channels are still important though digital channels are gaining positions.
Even though, new digital channels are mainly used in combination with more traditional channels. The service hotline is still customers first choice.

What was most important to you when you chose the service hotline to contact [Company] instead of a different channel?
When customers make **proactive contacts**, mobile apps are the most widely used among new digital channels.

**Mobile Network Providers**
- 79% traditional
- 29% legacy digital
- 15% new digital

- 77% Mobile providers base: n = 12,370, Italy n = 916
- 25% Retail Banking base: n = 12,321, Italy n = 1,152

**Retail Banking**
- 84% traditional
- 29% legacy digital
- 13% new digital

- 82%
- 24%
- 9%
- 61%

- 9%
Getting the basic right
Do customers receive a response and what is the impact on the relationship? How does impact vary by used channel?
Customers are more tolerant with new digital channels

- **New digital channels**
  - TRI*M index: 92
  - TRI*M index - Reply received: 79

- **Legacy digital channels**
  - TRI*M index: 84

- **Traditional channels**
  - TRI*M index: 72
  - TRI*M index - No reply received: 49

Base: n = 12,114
Cross-channel challenges and (customer services) opportunities

Why do customers switch channels for one and the same request?
What is the impact on the relationship?
Customers use multiple channels to get their request solved

22% of customers use more than one channel when contacting the company for a particular mission.
Multichannel can be a positive driver of relationship ... as long as customers are not forced to have several contacts to get their request resolved...

Because they **want to** (more info...)

<table>
<thead>
<tr>
<th>Channels Used</th>
<th>1 channel used</th>
<th>2 channels used</th>
<th>3 channels used</th>
<th>+ 3 channels used</th>
</tr>
</thead>
<tbody>
<tr>
<td>Attempts</td>
<td>70</td>
<td>81</td>
<td>90</td>
<td>102</td>
</tr>
</tbody>
</table>

Because they **have to** (to get request resolved)

<table>
<thead>
<tr>
<th>Channels Used</th>
<th>1 attempt to solve issue</th>
<th>2 attempts to solve issue</th>
<th>3 attempts to solve issue</th>
<th>+ 3 attempts to solve issue</th>
</tr>
</thead>
<tbody>
<tr>
<td>Attempts</td>
<td>84</td>
<td>73</td>
<td>62</td>
<td>58</td>
</tr>
</tbody>
</table>
Successfully closing a customer request

What is the impact of an unsolved service request?
How efficient are particular channels in getting requests solved?
Unresolved requests damage relationships, regardless of the customer mission

- TRI*M index - Resolved
- TRI*M index - Not resolved

Base: n = 12,114
How to win customers **preference** and drive repurchase

**CUSTOMER SERVICE**
- Deliver excellence in customer care and critical features
- Don’t let your customers down

**EMOTIONS**
- Touch your consumers emotionally
- Stimulate positive emotions

**PREFERENCE**
- Consumers love your products / service more than other
- Achieve product or service repurchase
How strong are your customer relationships?

Customer relationship – TRI*M Index

Overall 70

Preference 40

Relationship Strength TRI*M Index 55

Single customer experience

Overall rating

Overall rating
The honeymoon...

Constant performance

but fading preference

Source: TNS Customer Insight Surveys 2013/2014 – Retail bank in a BRIC market
Emotions are the key to preference & loyalty

How did you feel about this workshop visit?

Disappointed □ □ □ □ □ Delighted

“... Car needed repairs - it got repaired. No real customer experience as such.”
“Smooth operation no hitches”
“Service level”
“Repairs done well”
“Car works now”

“Usual standard of great customer service”
“Attitude of the staff; cleanliness of vehicle; advice”
“Lovely receptionist who made me feel important”
“Wonderful polite customer service; all question answered; work carried out at very competitive price and on time; brilliant”

Experiences become memories

Memories drive relationships

Relationships drive business outcomes
Successful companies seize the contacts where it matters and delight their customers

How did you feel about this recent experience with [Company]?

16% Delighted customers

TRI*M Index
Performance
Preference

119
115
111

72
65
57

delighted
not delighted

Base: n = 12,019
Thank you

Leda Riva
Head of Customer Strategies, KANTAR TNS

Leda.Riva@tnsglobal.com
Coffee break & Interactive Sessions

- "I-Want-to"moments in the Customer Journey. Monitoring cross device experience
  Angelo Liverani, GOOGLE

- Social Engagement matters: Euro 2016 Coca-Cola Twitter campaign - case history

- Beyond e-commerce: new touchpoints creating value for brands
  Marina Guida, AMAZON
Interactive Session

Social Engagement matters
Euro 2016 Coca-Cola Twitter campaign case history

Walter Caccia, Head of Brand & Communication, KANTAR TNS

Seminar Touchpoint: optimizing impact on Brand, Experience & Sales – Milan 12th October 2016
Authentic Amplification or Echo Chamber?
Going viral is not enough
Beyond counting

The conversations shape tells us a lot about the strength of engagement
Decentralised ecosystem
UEFA EURO 2016
Advertising effectiveness and social conversations on Twitter
Combining survey-based data & Twitter analysis

We carried out a post-test advertising survey to measure the efficacy of different commercials broadcasted during the event. One of them was…

- Coca-Cola – Tifiamo insieme

We held 500 interviews aged 18 to 64 who stated that they had seen the last match where Italy was involved (against Germany).

The interviews were conducted online, using TNS’s approach to determine the efficacy of campaigns to generate a benefit for the brand in the long-term.

The fieldwork took place from 5th to 7th of July.

<table>
<thead>
<tr>
<th>Total N. of tweets</th>
<th>155,390</th>
</tr>
</thead>
<tbody>
<tr>
<td>Official # of the campaign</td>
<td>#tifiamoinsieme</td>
</tr>
<tr>
<td>N. of campaign’s tweets from the official brand account</td>
<td>2,378</td>
</tr>
<tr>
<td>N. of campaign’s tweets (UGC)</td>
<td>12,528</td>
</tr>
<tr>
<td>N. of Twitter accounts</td>
<td>6,062</td>
</tr>
<tr>
<td>Search query</td>
<td>&quot;coca cola&quot; OR #coca cola OR @coca colaTA OR @CocaColaHBCI OR #tifiamoinsieme OR (&quot;coca cola&quot; and &quot;tifiamo insieme&quot;) OR (#coca cola and &quot;tifiamo insieme&quot;) OR (&quot;coca cola&quot; and &quot;tifiamo insieme&quot;)</td>
</tr>
<tr>
<td>Period</td>
<td>May-July 2016</td>
</tr>
</tbody>
</table>
The Coca-Cola campaign arise a higher attention and succeed in maintaining over-performing scores even on emotional feeling and relevance

The brain only pays attention when a message attracts attention, evokes personal affective associations, and is encoded in relation to our current goals. This produces richer, stronger and more durable brand representations in the mind.

Is unique and different  
Novelty

Matches your personal beliefs  
Affective impact

Is relevant in your current situation  
Relevance

<table>
<thead>
<tr>
<th></th>
<th>Coca Cola</th>
<th>Benchmark *</th>
</tr>
</thead>
<tbody>
<tr>
<td>Novelty</td>
<td>29</td>
<td>28</td>
</tr>
<tr>
<td>Affective impact</td>
<td>26</td>
<td>22</td>
</tr>
<tr>
<td>Relevance</td>
<td>25</td>
<td>23</td>
</tr>
</tbody>
</table>
The conversations shape is related to the ad’s brand building power.
Impactful role of the influencers in spreading the Coca-Cola campaign. They have been successful in involving their respective communities in the conversation.

#Touchpoint: optimizing impact on Brand, Experience & Sales
Time period: May 01 – Jul 31, 2016 Base: 12,528 Tweets (Total Coca Cola Tweets)
Achieving authenticity
Creating Authentic Amplification

1. Going viral is not enough

2. Amplification via engagement, not through shouting louder

3. Target communities not just influencers
Sum up / Marketing in a connected world

Federico Capeci
Chief Digital Officer & CEO Italy, KANTAR TNS
• Single view
• Effectiveness/engagement not only reach
• Prioritize touchpoints that impact (20%)
• Compare your results with best competitors

Brand

Experience

Sales

• Experience impacts relationship
• Customer service excellence is not an option
• Stimulate positive emotions for preference and loyalty

• Shopper needs different contents according to different moments/needs
• Choose the right platform, find the perfect moment to influence
Thank you

Federico Capeci
Chief Digital Officer & CEO, KANTAR TNS

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