Using Scanner Data To Answer Food Policy Questions

Conference

Wednesday, June 1 - Thursday, June 2, 2011

Economic Research Service
1800 M Street, NW
Waugh Auditorium
Washington, DC

Innovations in Scanner Data

Paul Donato
The Nielsen Company

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RESEARCH

INNOVATION

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Developing

Reverse Innovation

Supply Chain

Games

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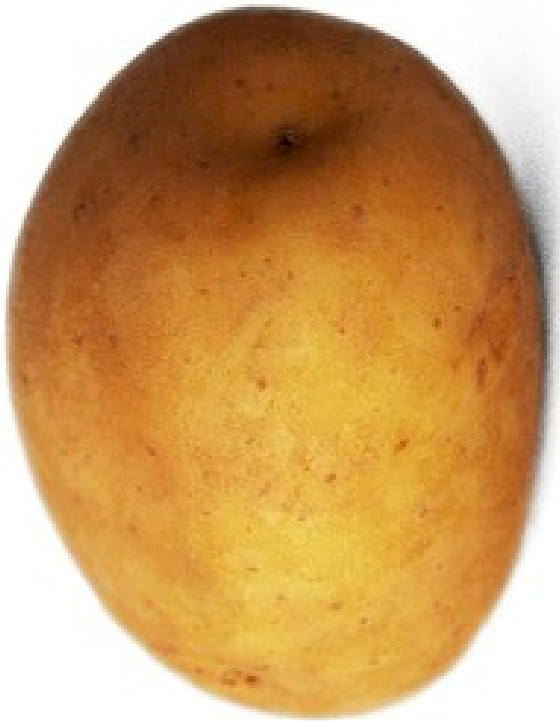
Straight



Round

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Developing

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Growth = India, China & Africa

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Reverse Innovation: How GE is Disrupting Itself

Rather than follow its historical path of developing high-end products and adapting them for emerging markets, GE is developing local technologies in these regions and then distributing them globally.

Harvard Business Review

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What’s Straight and What’s Round?

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Innovations most likely to reverse

Mobile Scanning

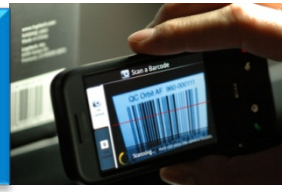

Image Recognition

Crowd Sourcing

Supply Chain

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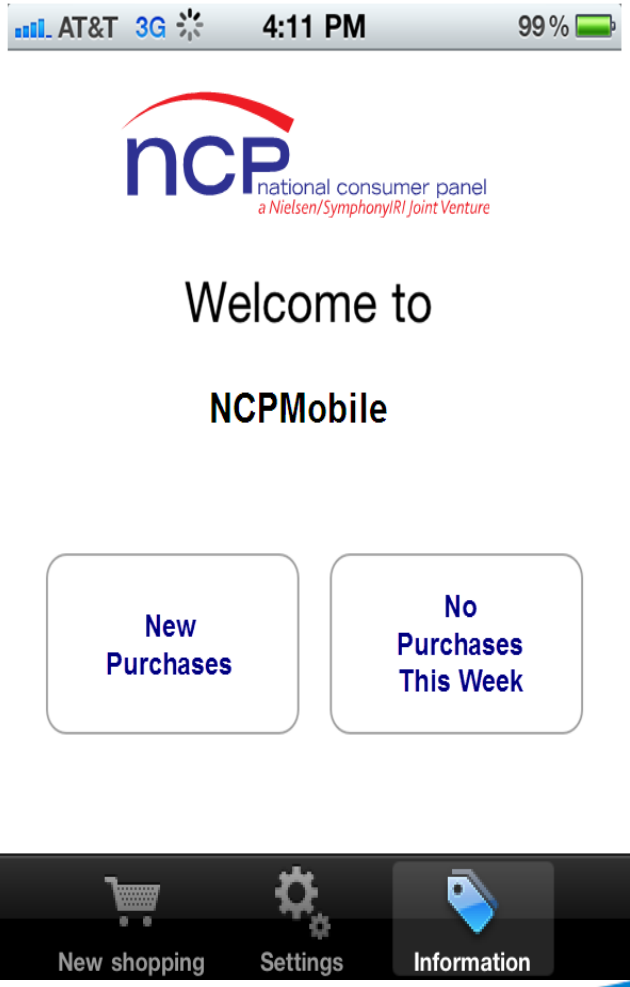
From here .....

To here .....



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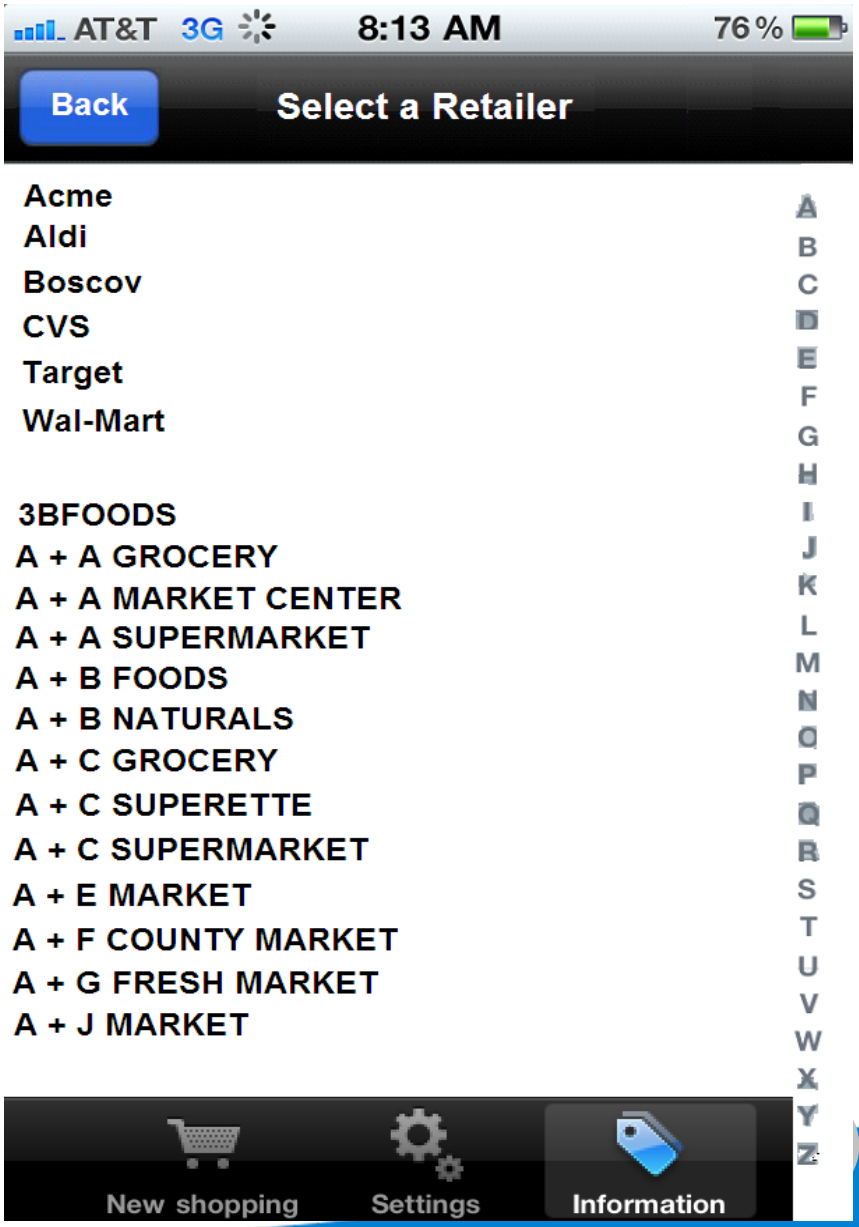
AT&T 3G
2:33 PM
Back
Select Shoppers
Next
Who Shopped?
Carol F 1948
Daniel M 1945
Patrick M 1968
Who Accompanied the Shopper?
Carol F 1948
Patrick M 1968
Beverly F 1945
Danny M 1995
Lindsay F 1997
Shopped Alone
Shopping Date
March 7 2011
New shopping
Settings
Information


AT&T 3G
8:13 AM
76 %
Back
Select a Retailer
Acme
Aldi
Boscov
CVS
Target
Wal-Mart
3BFOODS
A + A GROCERY
A + A MARKET CENTER
A + A SUPERMARKET
A + B FOODS
A + B NATURALS
A + C GROCERY
A + C SUPERETTE
A + C SUPERMARKET
A + E MARKET
A + F COUNTY MARKET
A + G FRESH MARKET
A + J MARKET
A B C D E F G H I J K L M N O P Q R S T U V W X Y Z
New shopping
Settings
Information

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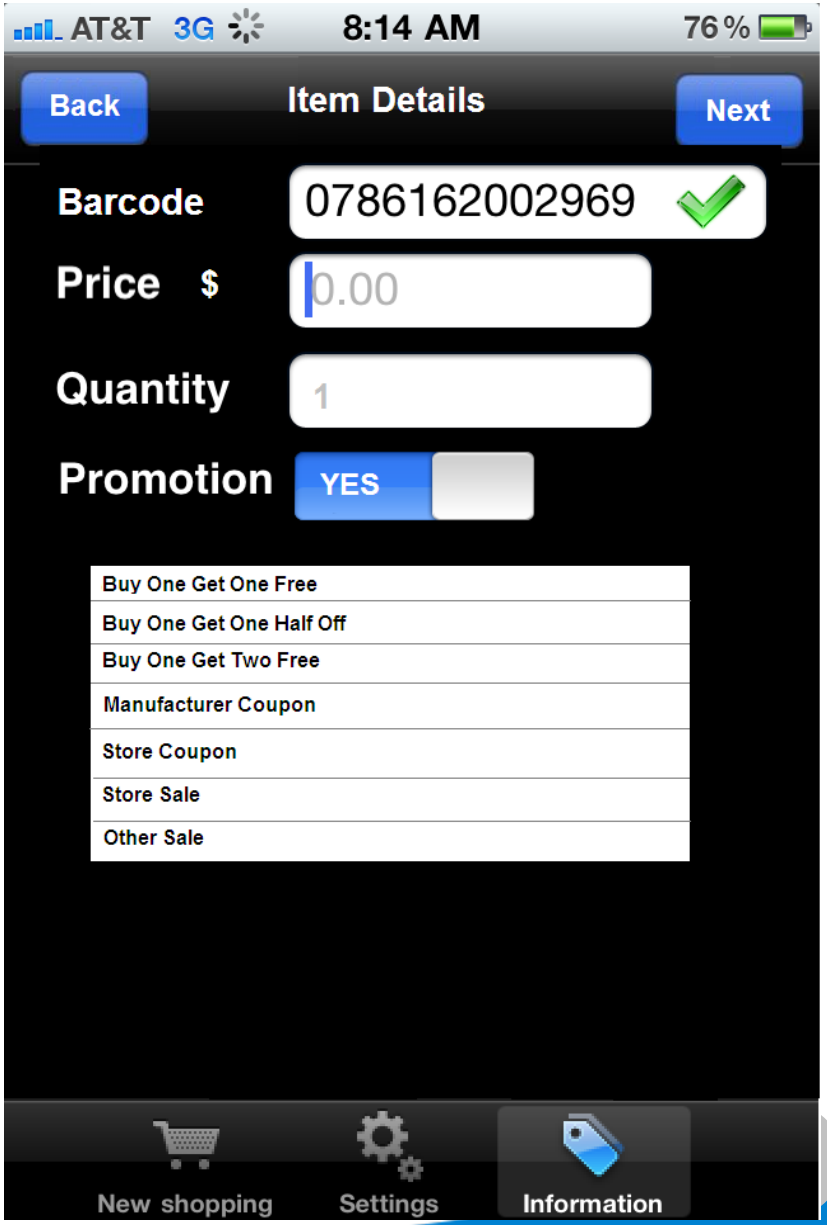
AT&T 3G
1:21 PM
Aim at the code through the red target.
16" E Stock Pizza
0 00000 52924 2
Back
Enter Code
Code Book


AT&T 3G
8:14 AM
76 %
Back
Item Details
Next
Barcode
0786162002969
Price $
0.00
Quantity
1
Promotion
YES
Buy One Get One Free
Buy One Get One Half Off
Buy One Get Two Free
Manufacturer Coupon
Store Coupon
Store Sale
Other Sale
New shopping
Settings
Information

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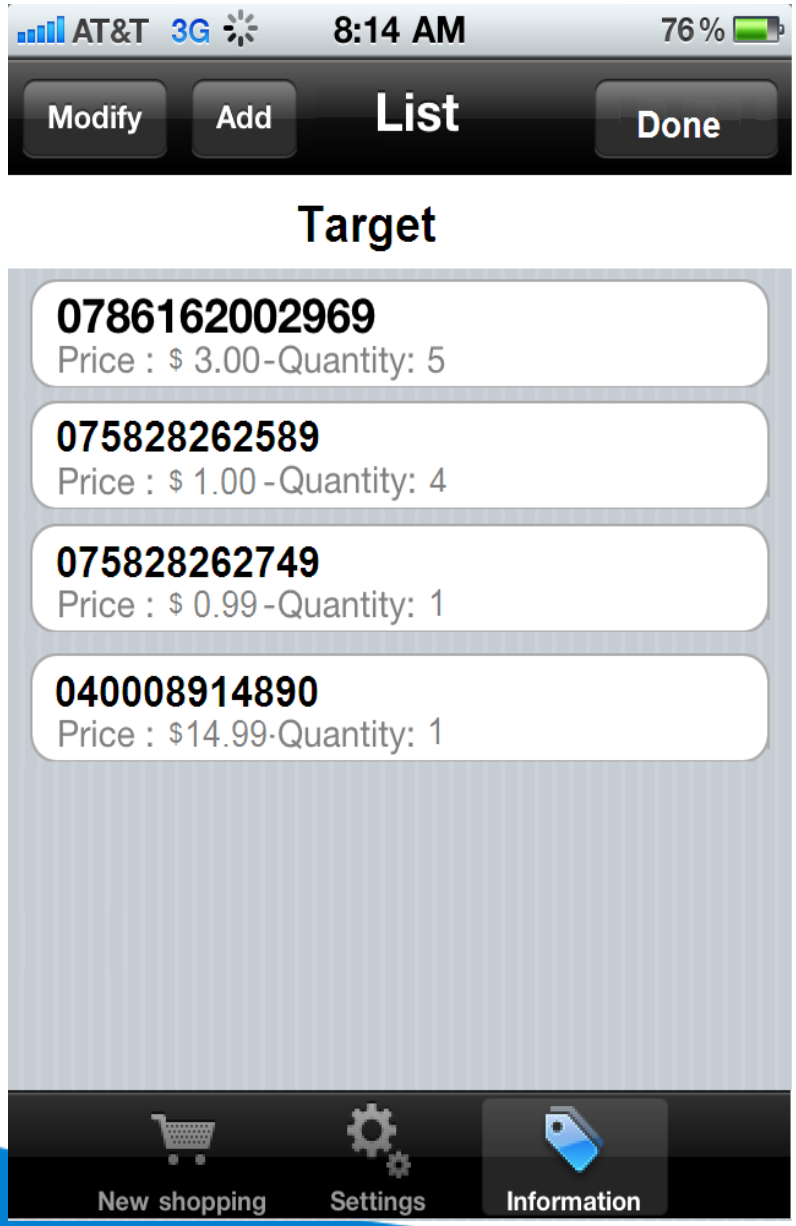
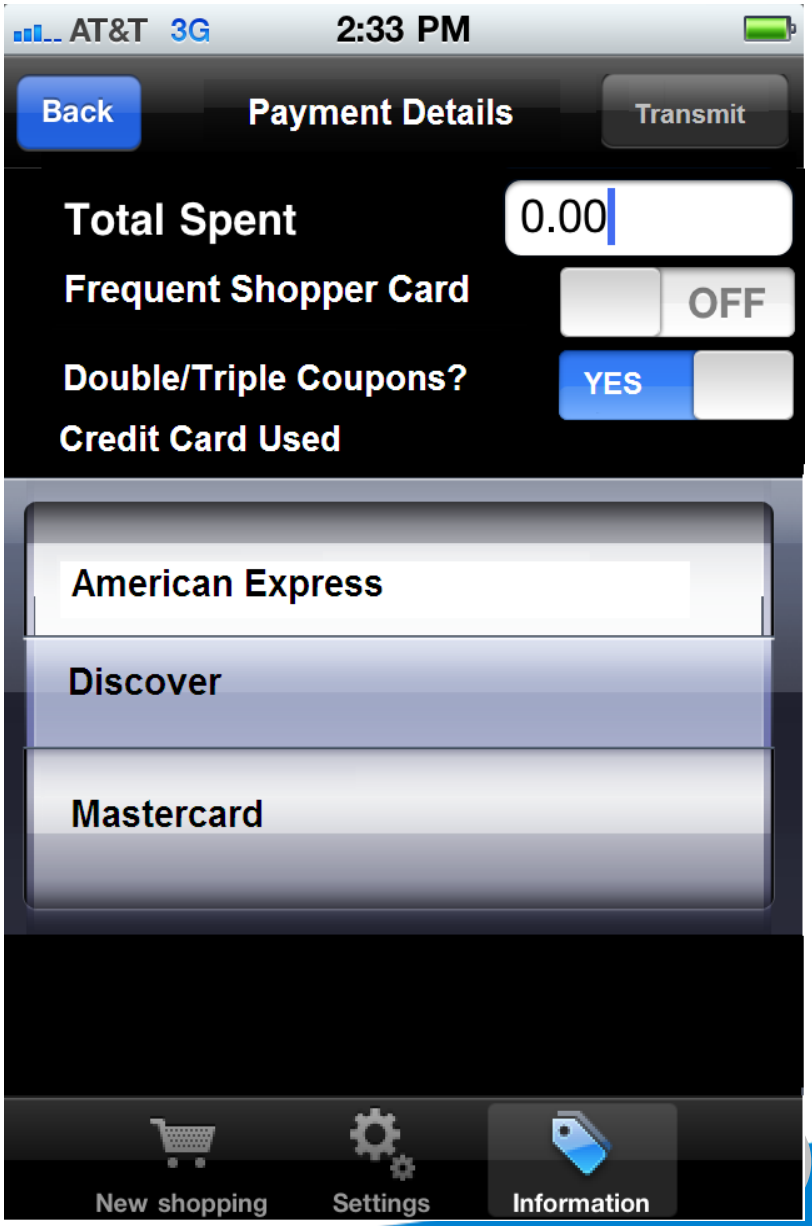

AT&T 3G
8:14 AM
76%
Modify
Add
List
Done
Target
0786162002969
Price : $ 3.00-Quantity: 5
075828262589
Price : $ 1.00 -Quantity: 4
075828262749
Price : $ 0.99 -Quantity: 1
040008914890
Price : $14.99-Quantity: 1
New shopping
Settings
Information


AT&T 3G
2:33 PM
Back
Payment Details
Transmit
Total Spent
0.00
Frequent Shopper Card
OFF
Double/Triple Coupons?
YES
Credit Card Used
American Express
Discover
Mastercard
New shopping
Settings
Information

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Is this Innovation….

Disruptive

The Pros

- Cost
- Young
- Out Of Home
- Opt In GPS

But, in "Growing" Economies,

70% of Coke is sold in stores like these.

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Disruptive Innovation !

Mobile Scanning

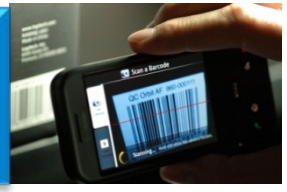

Image Recognition

Voice, Survey & Location

Crowd Sourcing

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Nielsen App Store

Short Format
Image
Audio Analysis
Opt In Location
Multiple Panels
Rewards Program
Demo Video

Game Layer

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Home Page

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Channel Type

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Channel Type

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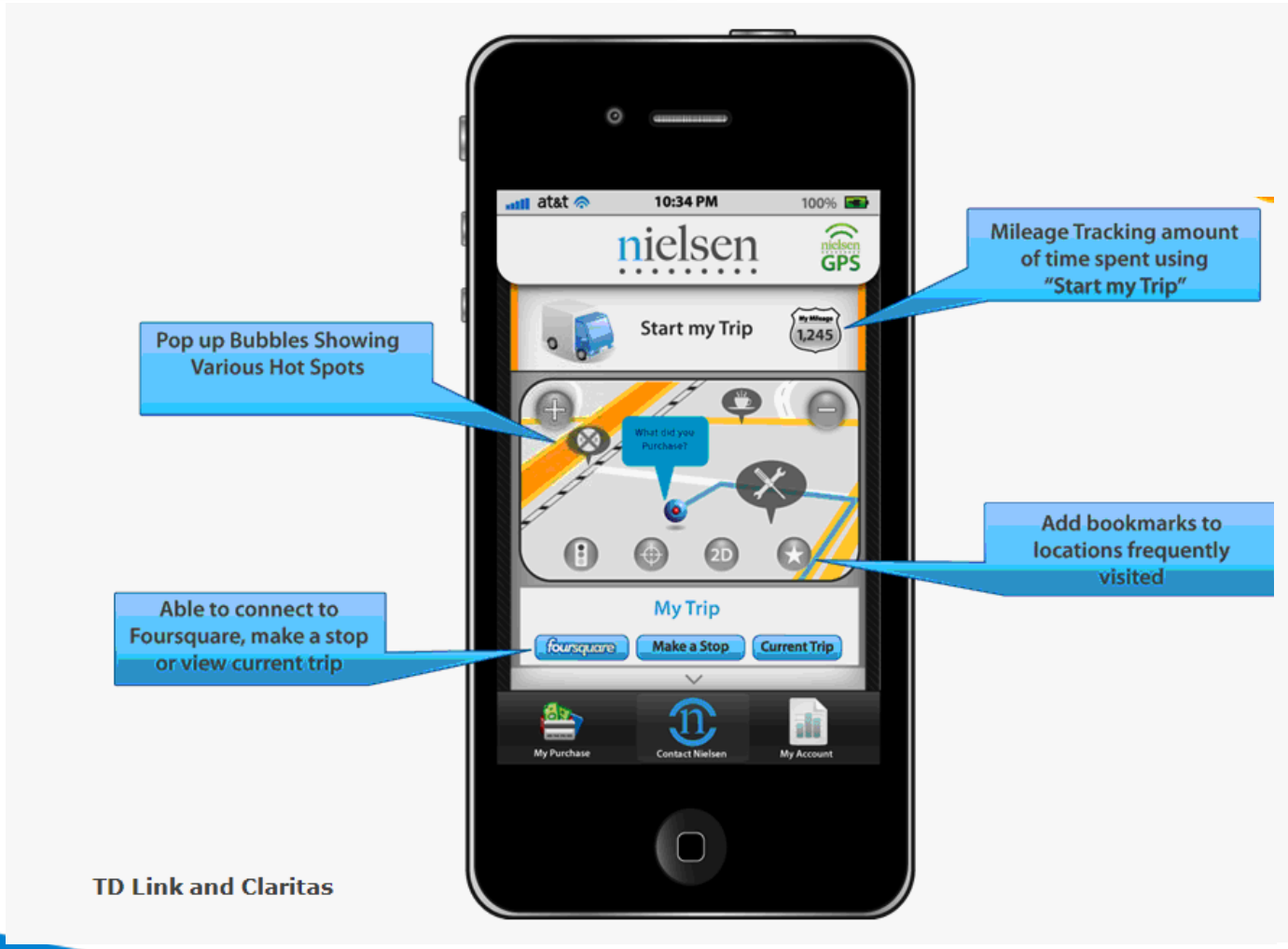
Location Tracking



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Rewards

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Life 360

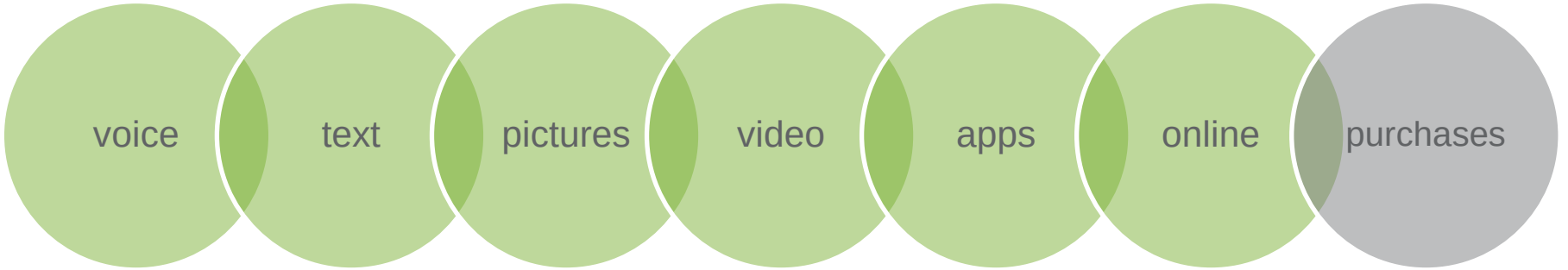
Link to Nielsen Panels: Homescan, MegaPanel (or third party)

Recruit based on actual purchasing behavior

Observe Actual behaviors

Emotive needs, social interactions, influences and lifestyle connections

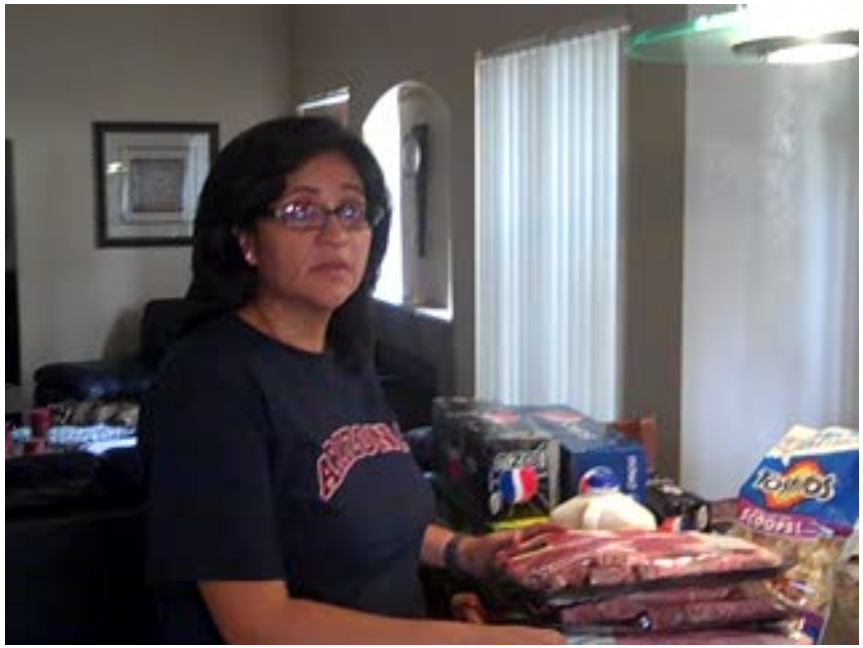
Typically Based on Segmentation



Some Sample Homescan Studies

- "Better for You Snacking"
  - 65 panelists charted all meals and snacks / 10 days
- "Open Wallet" study
  - 65 panelists charted all purchase activity to gauge economy's impact on spending in snacks / 14 days
- E-Grocery Deep-Dive
  - 20 panelists recorded online grocery usage & attitudes, trip drivers, frustrations / 14 days
- Hispanics: Meals, Cooking & Culture
  - 18 panelists recorded shopping habits, cooking demos using mainstream and Authentic Mexican cheeses / 2.5 weeks

Post Trip: Why did we buy?



http://tinyb.it/5F2C95E11126

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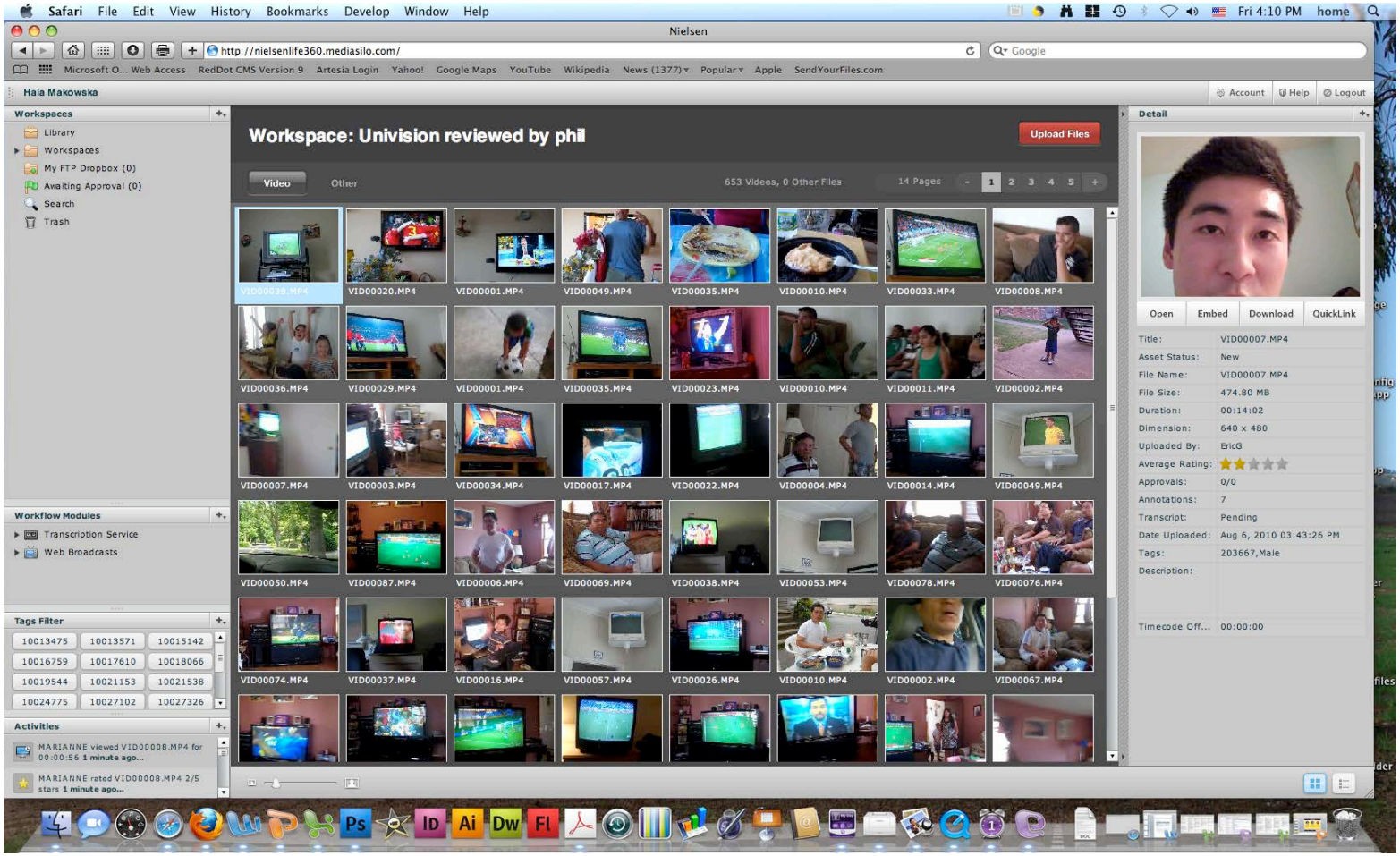
Media Autobiography



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Clients and Studies

- ✓ Shopping, healthy living, economy's impact on purchases, entertainment & leisure, digital media & device usage
- ✓ Sports fans: US and World Cup
- ✓ Tech adoption, new products (BASES II)

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What Clients Say

- *"The Life360 project vividly brought to life how media and communications technology is changing the way consumers watched the World Cup matches and consumed related content."*

  – Elizabeth Ellers, EVP Corporate Research, Univision

"Our client was able to identify and correct some engineering issues in the product design that were creating confusion and problems for consumers. This was a huge benefit as they may not have identified these issues without being able to view consumers using the product through video."

– CPG manufacturer, in-home usage study

"We wanted to be able to take a deeper look at cooking behavior and attitudes . . . That's where Life360 was a big component to seeing what was actually going on in the home — from the role of brand, quality and family to product. The work was great and provided so much guidance and understanding to our team."

– Chris Suwanski, Consumer Insights, Kraft Foods

World Cup Survey

- 84% of all surveys were completed
- No “fatigue factor” over time
- 61% were completed in less than 10 min
- 71% took pictures with captions

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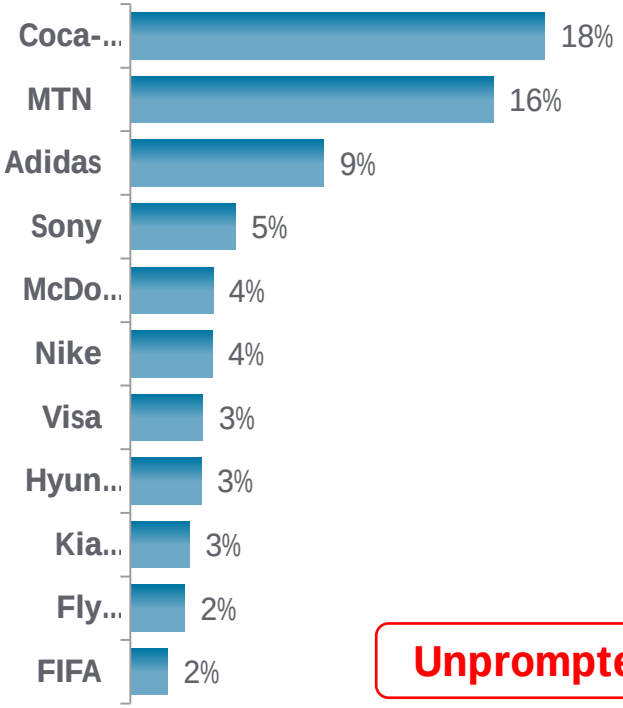
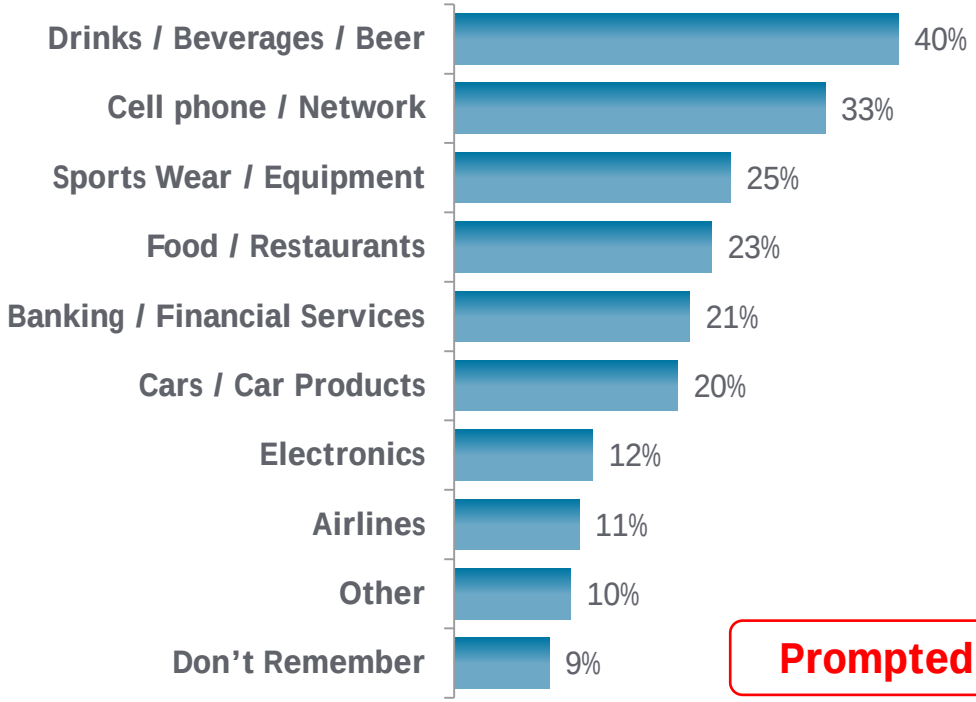
In the Moment

What brands stood out to you today?



Unprompted

What ads have you noticed following sports today?

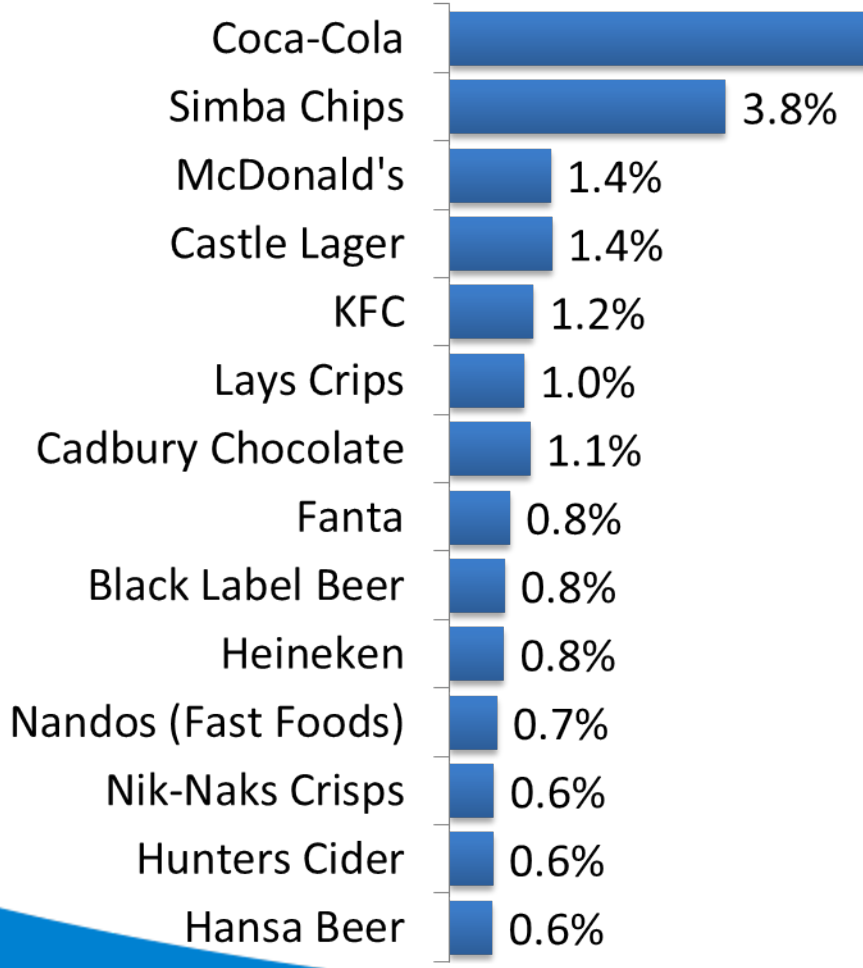


Prompted

Source: Nielsen Life360 South Africa
Adults 16+ in Johannesburg, Pretoria, Cape Town & Durban

Data and Images Packaged in a Journal

Please list brand names of all food and beverages you recall purchasing today



Respondents were asked to type the brands that they recalled purchasing during the day into their BlackBerry smartphones.

The highest incidence of brand recall was for Coca-Cola, Simba Chips and McDonald's. The concurrent mention of Coca-Cola and Simba Chips was also the highest.

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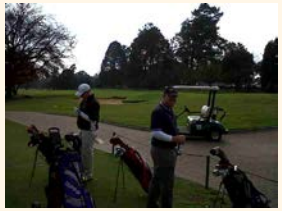
Peter – Male | 50+ | English | Johannesburg

Life360

	[Fri] 11 June	[Sat] 12 June	[Sun] 13 June	[Tue] 15 June	[Wed] 16 June	[Thu] 17 June
[Morning] 06:00-10:00						
[Daytime] 10:00-13:00						
[Afternoon] 13:00-16:00						
[Evening] 16:00-19:00						
[Prime Time] 19:00-23:00						

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SharePoint Pivot Architecture Overview

http://tinyb.it/F2CA3755AC31

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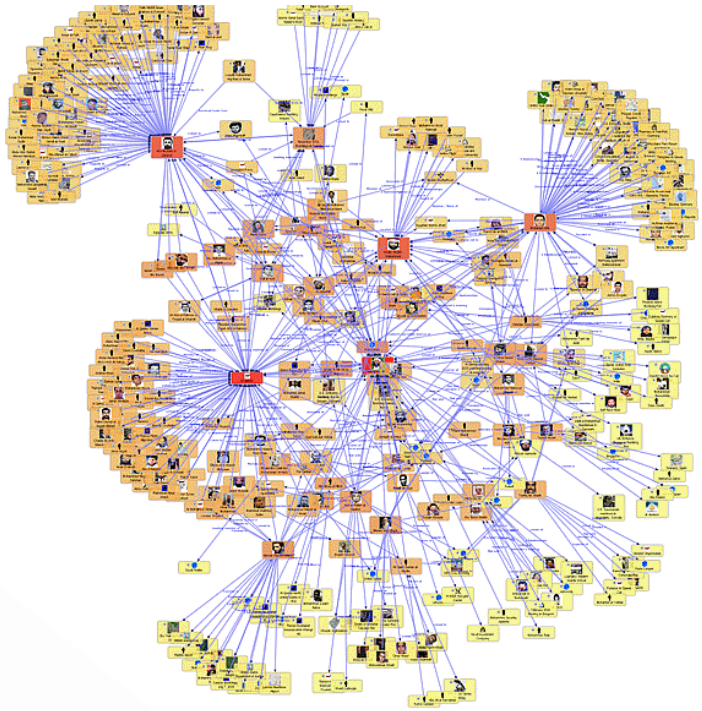
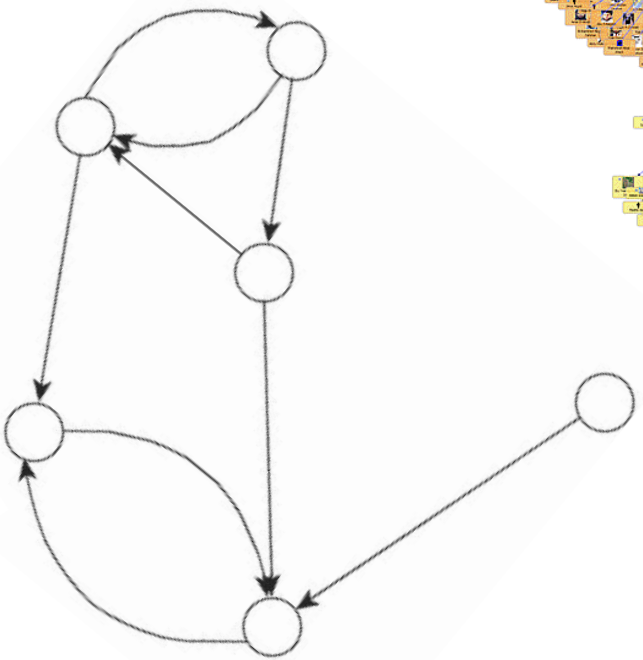
The Game Layer





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Games and Other Apps

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ABC's Ingenious App Uses Sound to Sync iPad, TV

By Eliot Van Buskirk ✉ September 17, 2010 | 1:01 pm | Categories: Advertising, Media

The iPad app … is nothing short of genius.

WIRED

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The Crowd Source Model

ONENEWS BETA

Will Social Media Replace Surveys as a Research Tool?

Biggest Research Buyer P&G Says It Wants Less Methodology Dogma, More Projections

P&G

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The Supply Chain Scanners

In Developed Markets

In Growing Markets

Basket by Household

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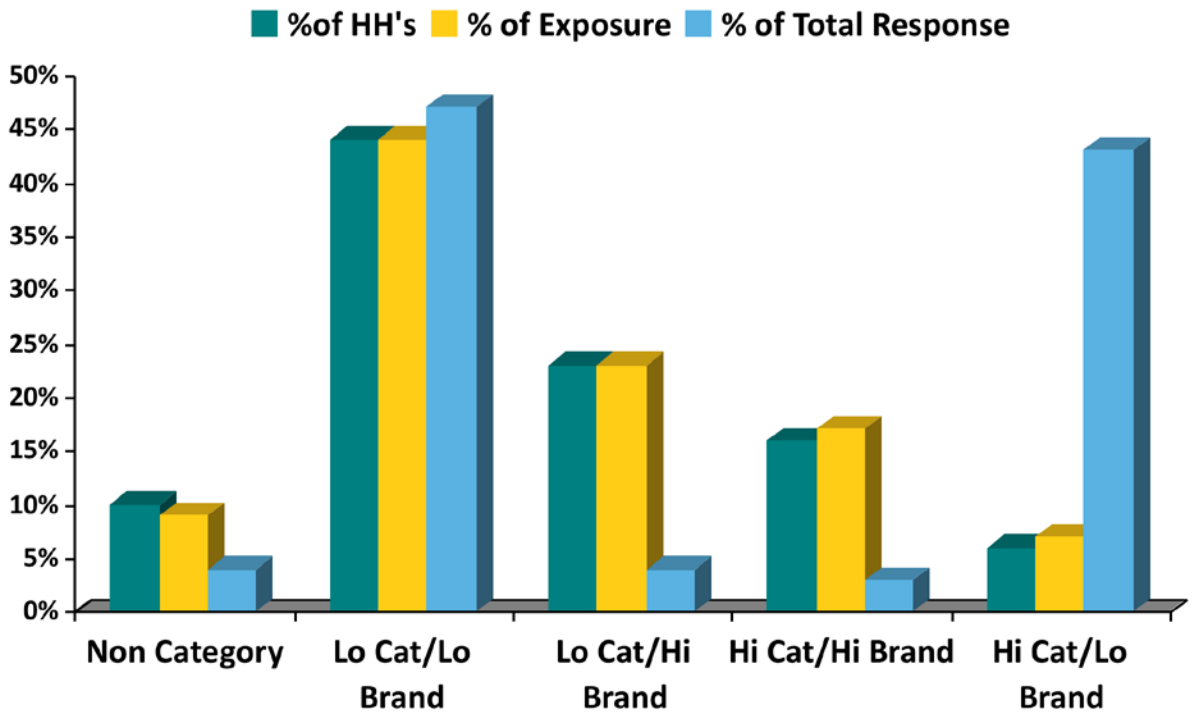
The New Scanner Databases Return On Investment



7% of exposures drove **43%** of the total incremental sales.

Source: Nielsen/ Catalina

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Developing

Reverse Innovation

Supply Chain

Games

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House Keeping

Non-Probability And Incomplete Samples

Fusion And Data Integration

Counts, Measurement and Knowledge

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Thanks

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Post Script ….

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Post Script …

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