

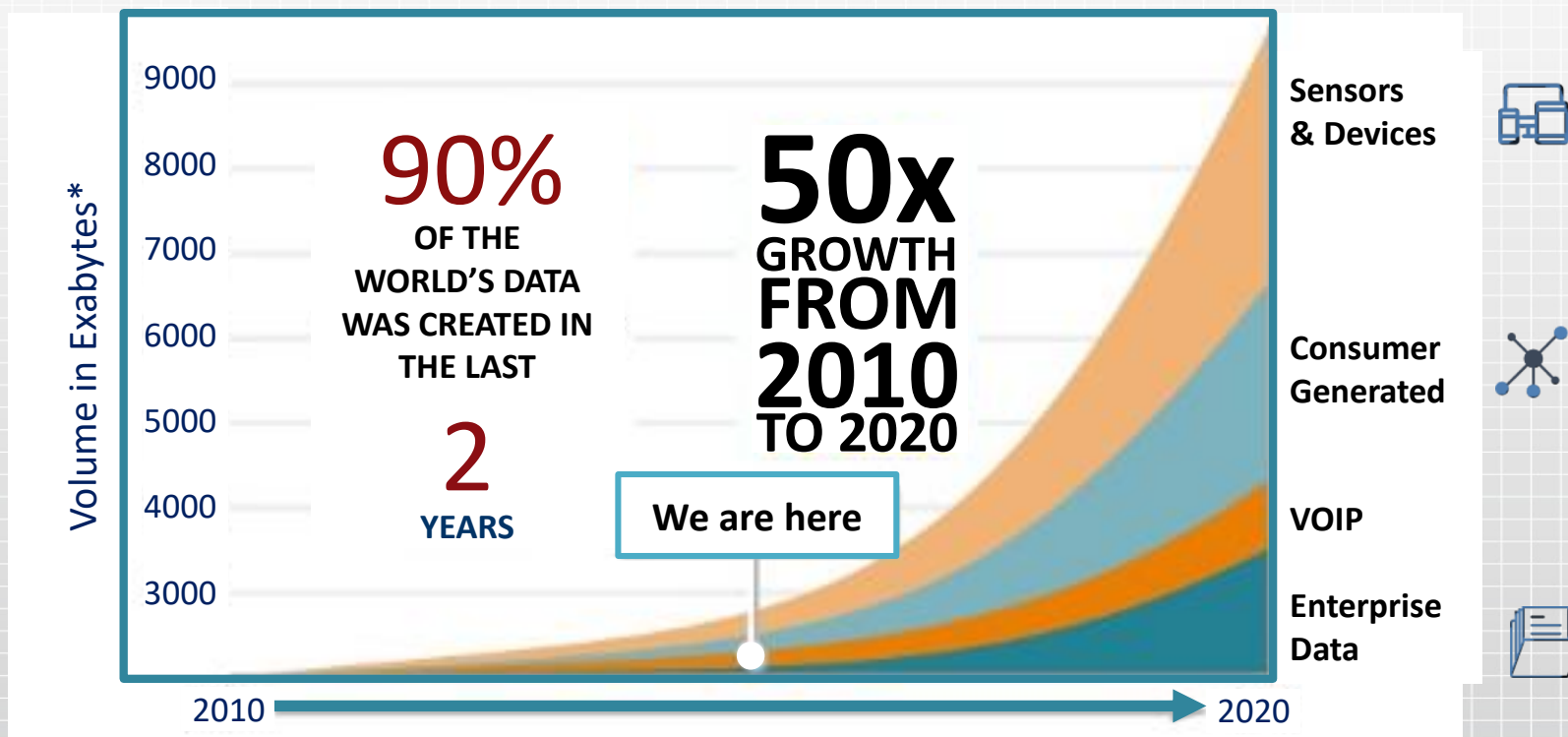
From data to the ideal product Google, Amazon and More

Mathieu Trepanier (PhD), CEO & Co-Founder, Zurich, March 22nd, 2018



CONTEXT: WHAT IS BIG DATA?

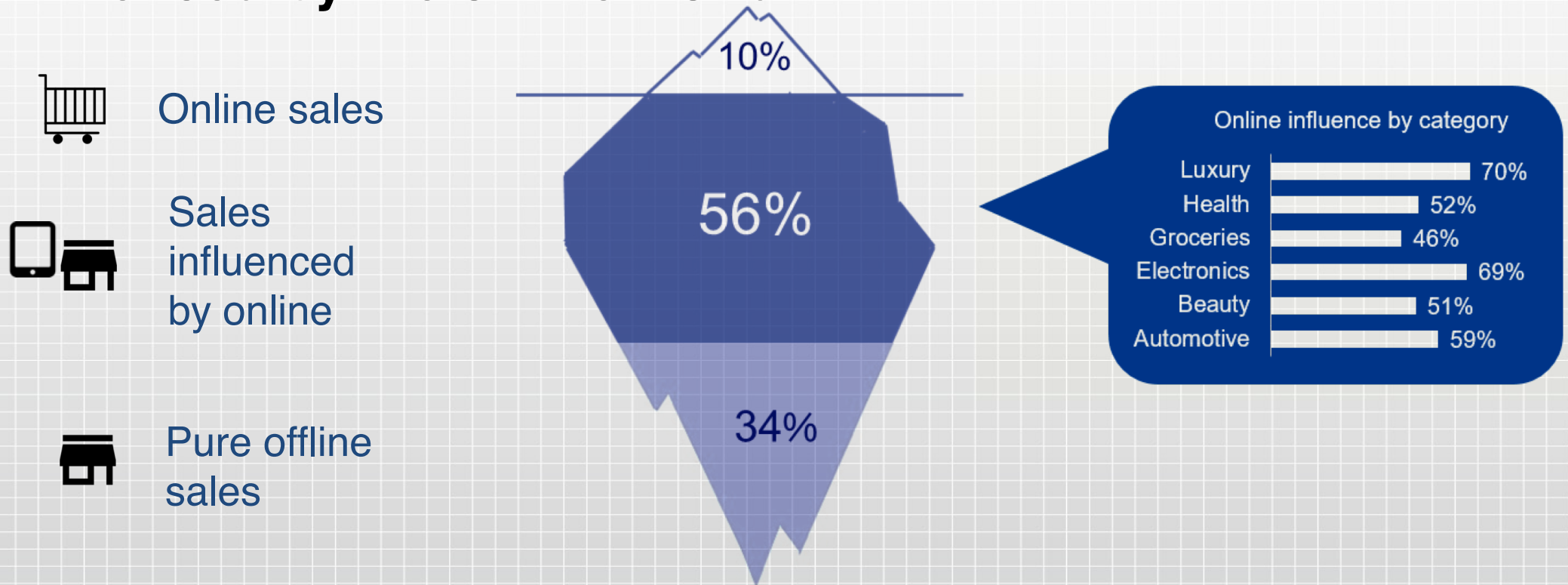
Big in growth, too



*1 exabyte (EB) = 1,000,000,000,000,000 bytes

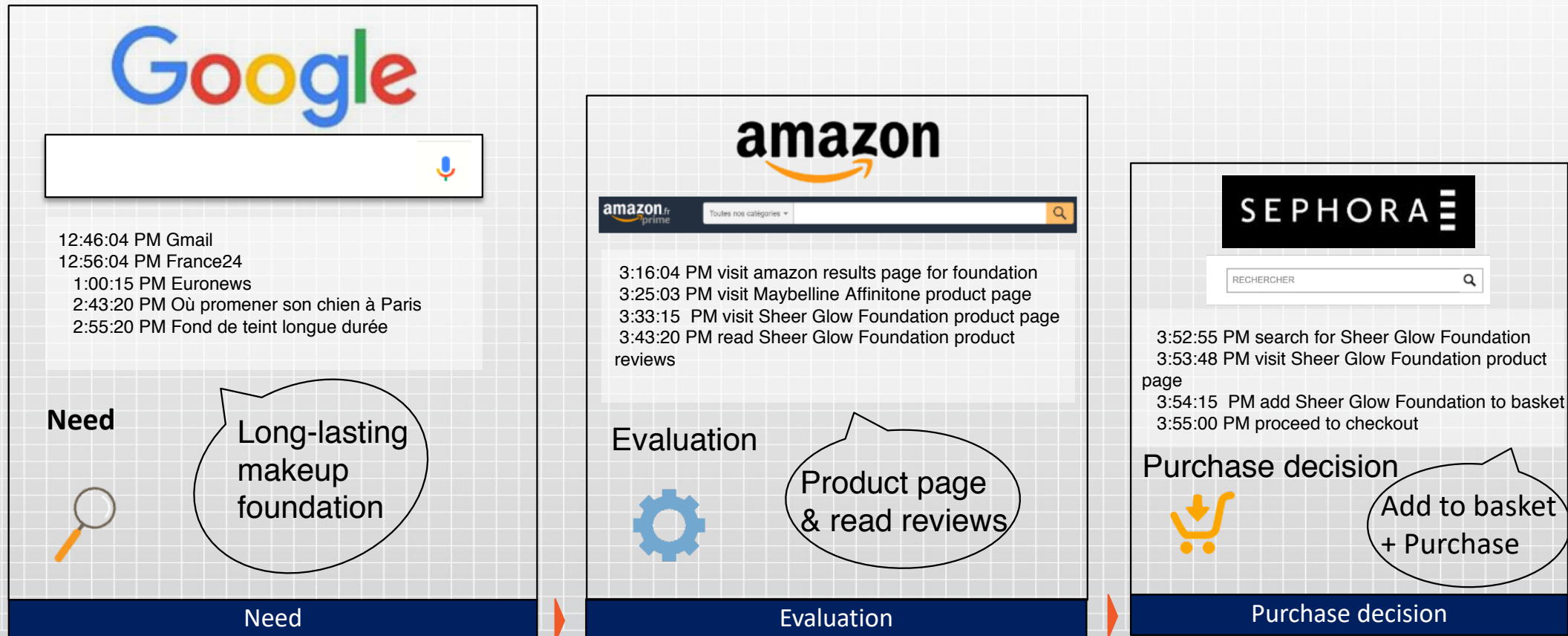
Online sales are only the tip of the iceberg

56% of sales across categories are already influenced by the online world



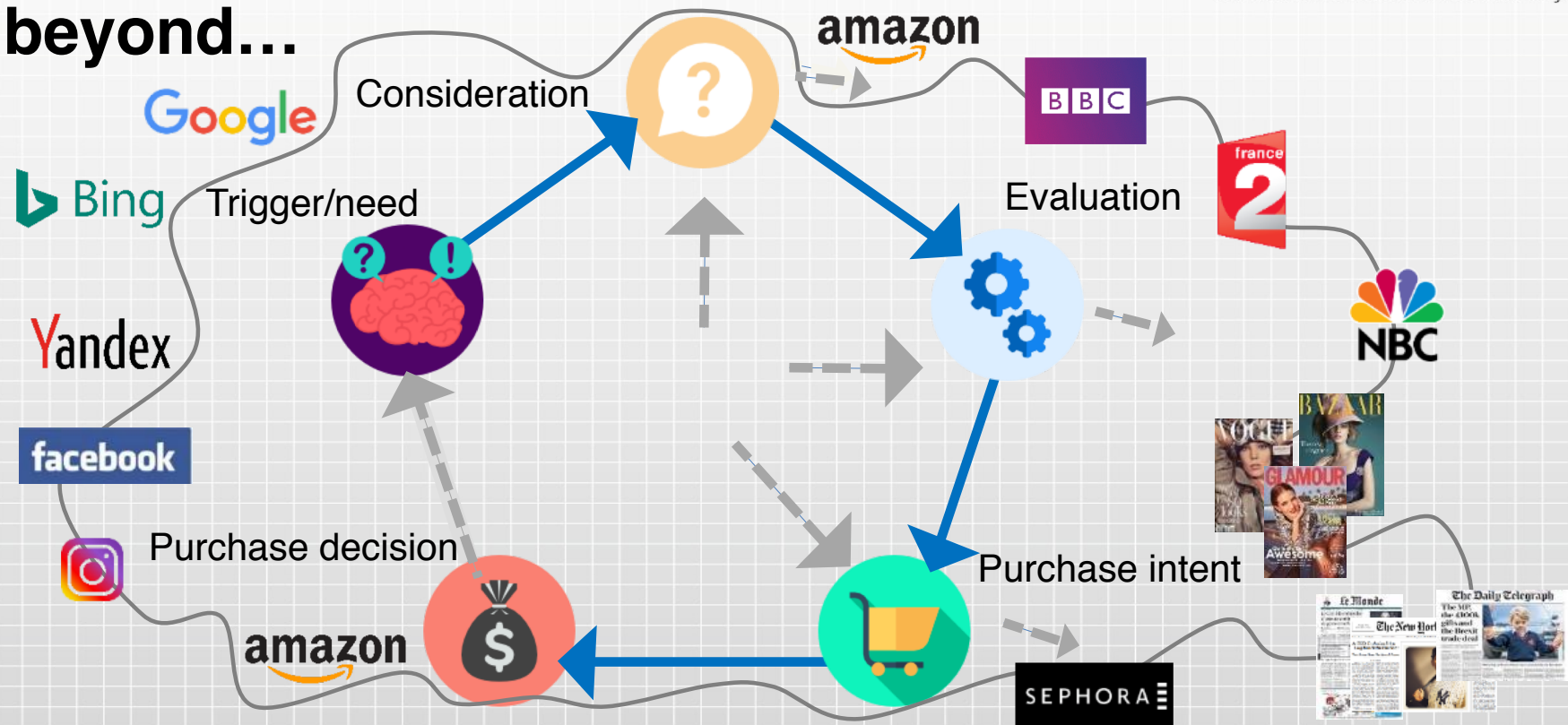
Source: Deloitte "The new digital divide", 2016, USA. Statista "E-commerce figures", 2017, Global.

Insights with unlimited granularity



From data to the ideal product – Google, Amazon and More - Slide 4

From first search to purchase decision and beyond...



... millions of touchpoints throughout a complex consumer journey

Analyzing the 'natural' trend

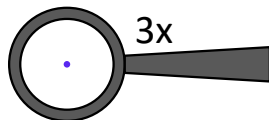
- **Natural means many things** and points to a multiplicity of micro-trends



FULLY RAW

...

Our study considered 8.2 billion **yearly searches** in the US and the UK



A large quant study would typically reach up to 150,000 respondents



In this study, over **97 million** yearly searches related to food and beverages were considered

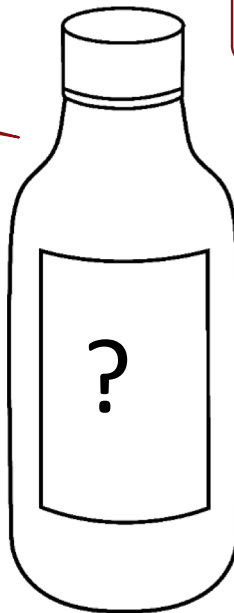
In total, more than **8.2 billion** yearly searches in the US and the UK were considered for this study

Challenge: identify the emerging category needs or addressing a particular audience, and the right brand offering

Benefits area?

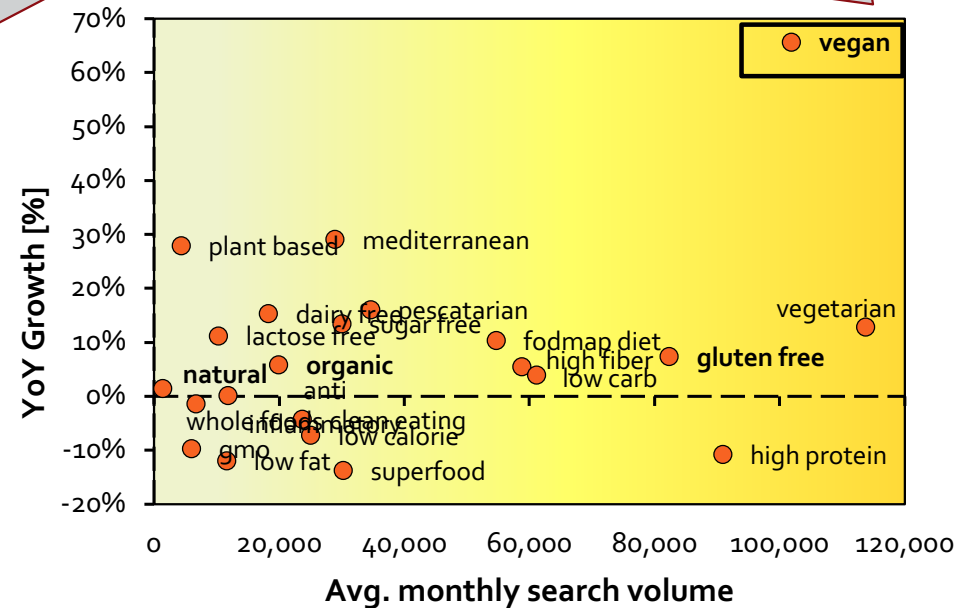
Main ingredients ?
Free from ?

Incrementality ?

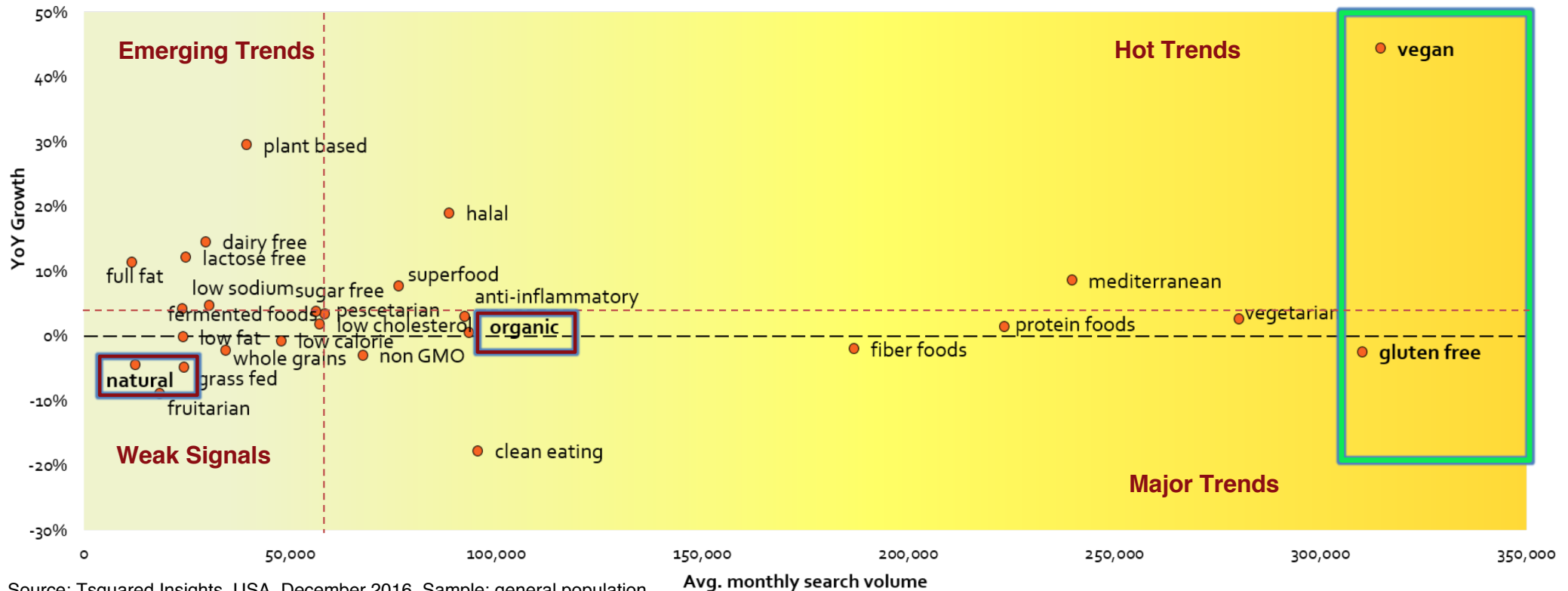


Audience ?

Growing need to address ?



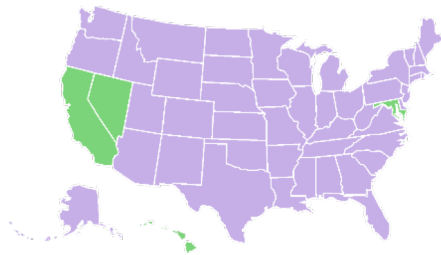
Food, diet, and dietary restriction search trends in the US show **Vegan and Gluten free** as top searches while **Organic and Natural** are more niche



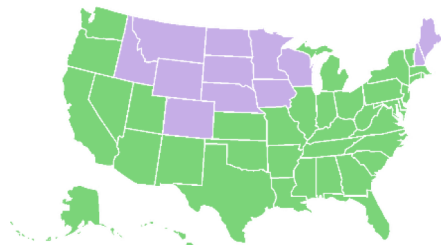
Source: Tsquared Insights, USA, December 2016. Sample: general population

In the US, interest in 'vegan' initially overtook 'gluten-free' in California, later to spread

2012



2016



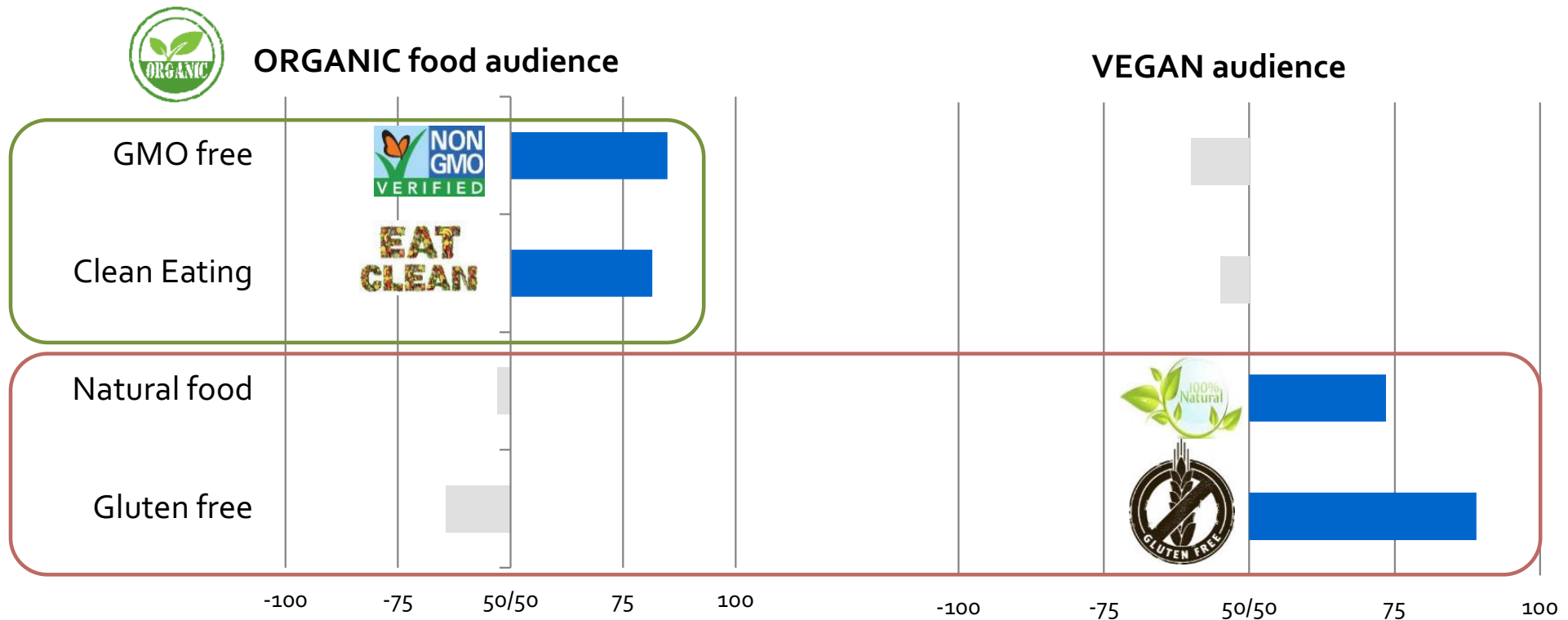
Search topic ranking by state
Vegan > Gluten free
Gluten free > Vegan

Source: Google Trends, USA, December 2016.

Who are my target consumers?



Organic food audience **associates strongly with GMO free and Clean eating**; Vegan audience is behaviorally similar to **Gluten-free and Natural audiences**

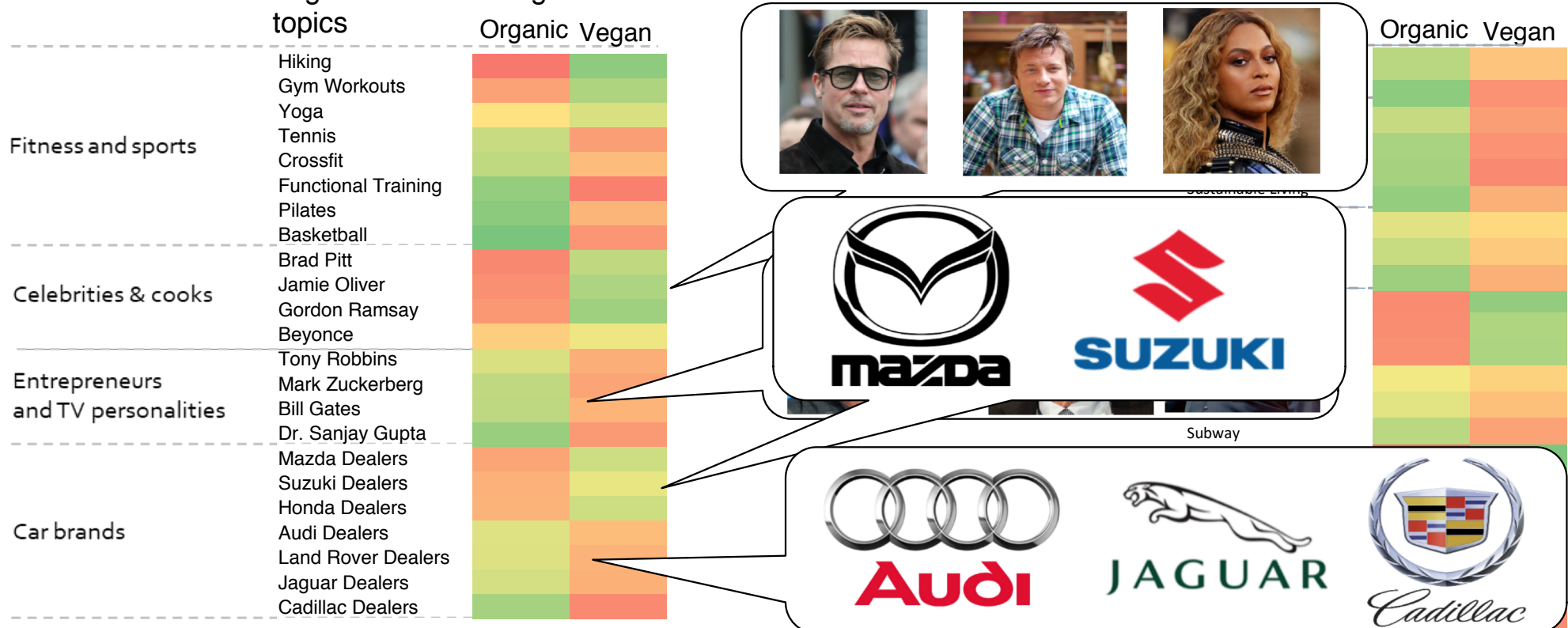


Source: Tsquared Insights, USA, October 2016. Sample: organic food audience, vegan audience.

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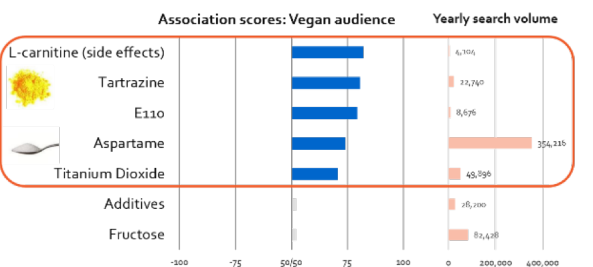
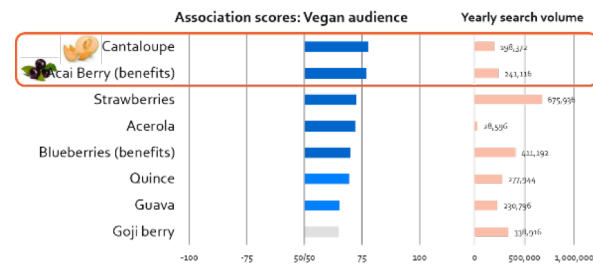
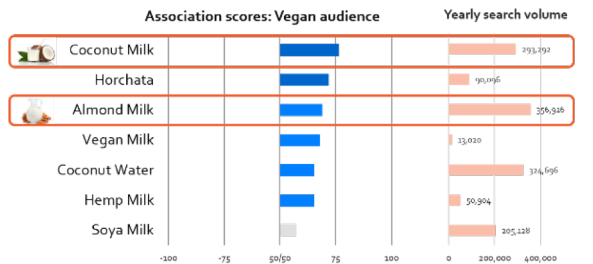
This difference between audiences can be seen across many topics through search association scores

Organic food and vegan audience: search association scores across topics



Source: Tsquared Insights, USA, October 2016. Sample: organic food audience, vegan audience.

Identifying likes and dislikes of the UK vegan audience to create an ideal 'dairy' drink



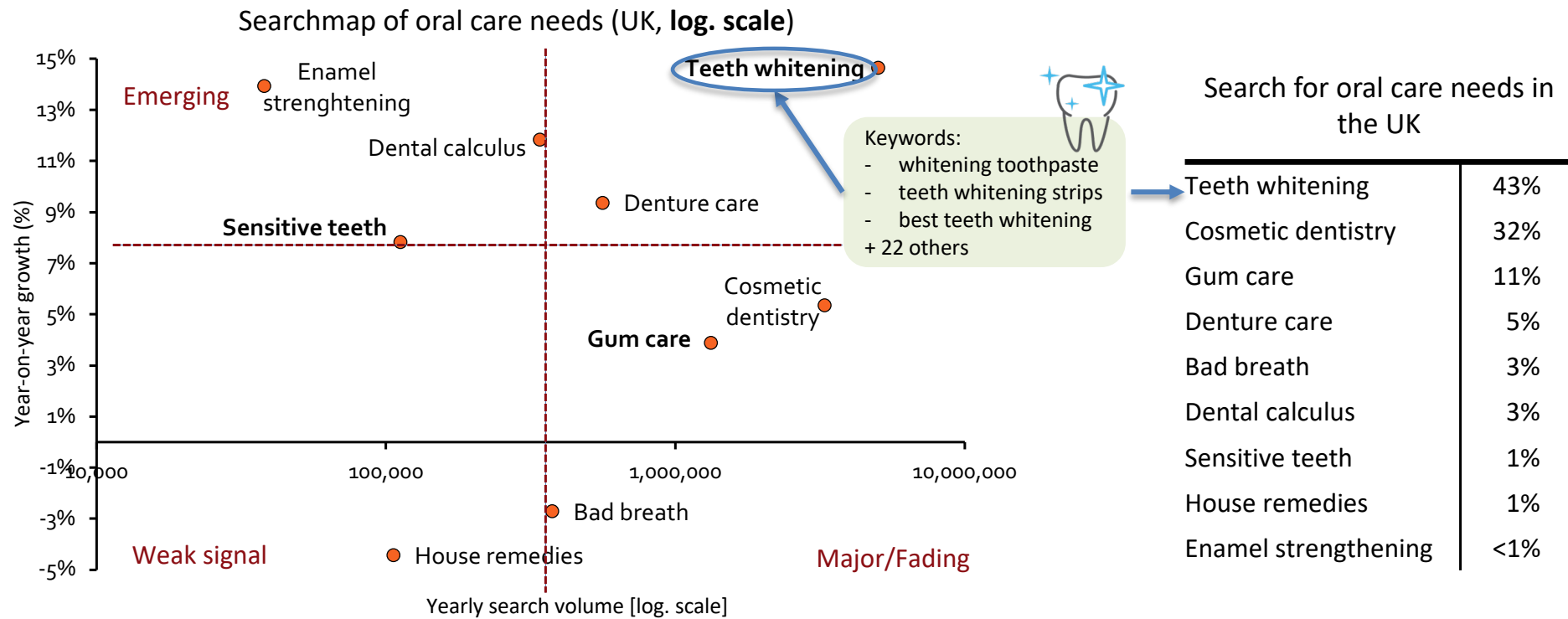
The vegan audience is interested in ingredients such as **cantaloupe, acai berry and coconut and almond milk**, while **L-carnitine, synthetic dyes and aspartame** should be avoided for this audience



Source: Tsquared Insights, UK, November 2016. Sample: vegan audience.

WHITENING IS THE #1 ORAL CARE NEED IN SEARCH AND GROWTH IN UK

75% of oral care search relates to appearance



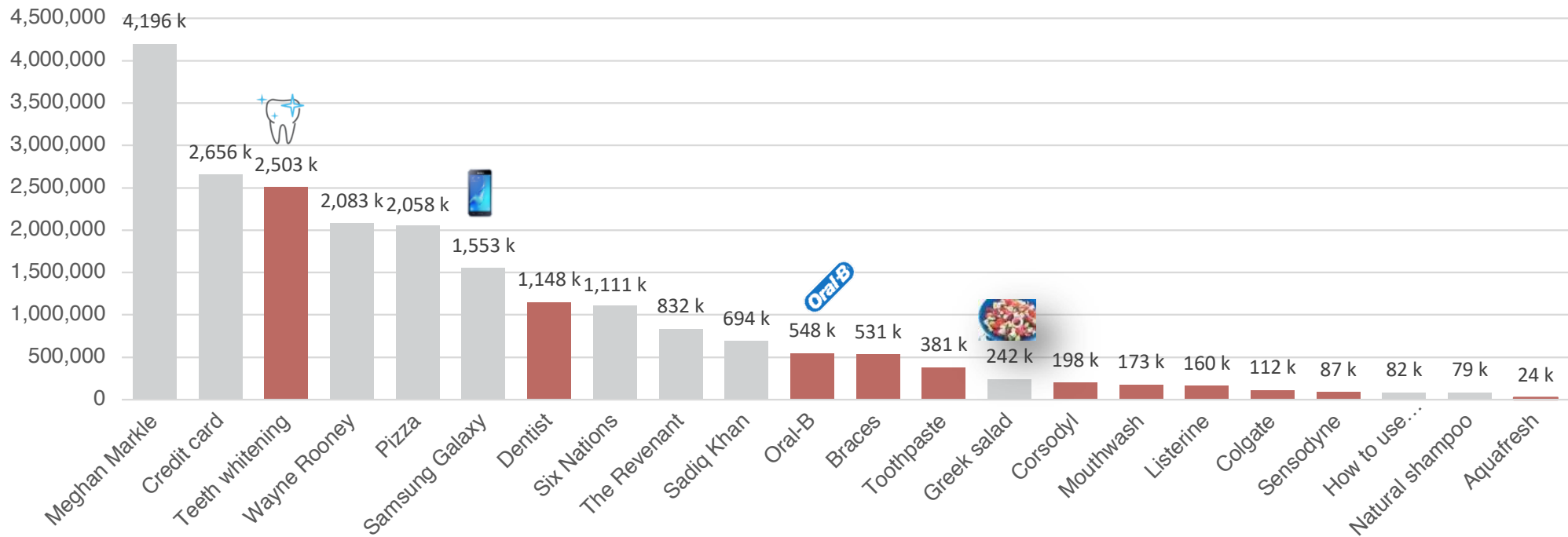
Source: Tsquared Online Search Insights, UK, July 2017. Yearly search volume: June 2016 to July 2017. Combined volume and growth.

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WHITENING TOPS ORAL CARE SEARCH

More popular than pizza, but less than Meghan Markle

Yearly search volume per keyword

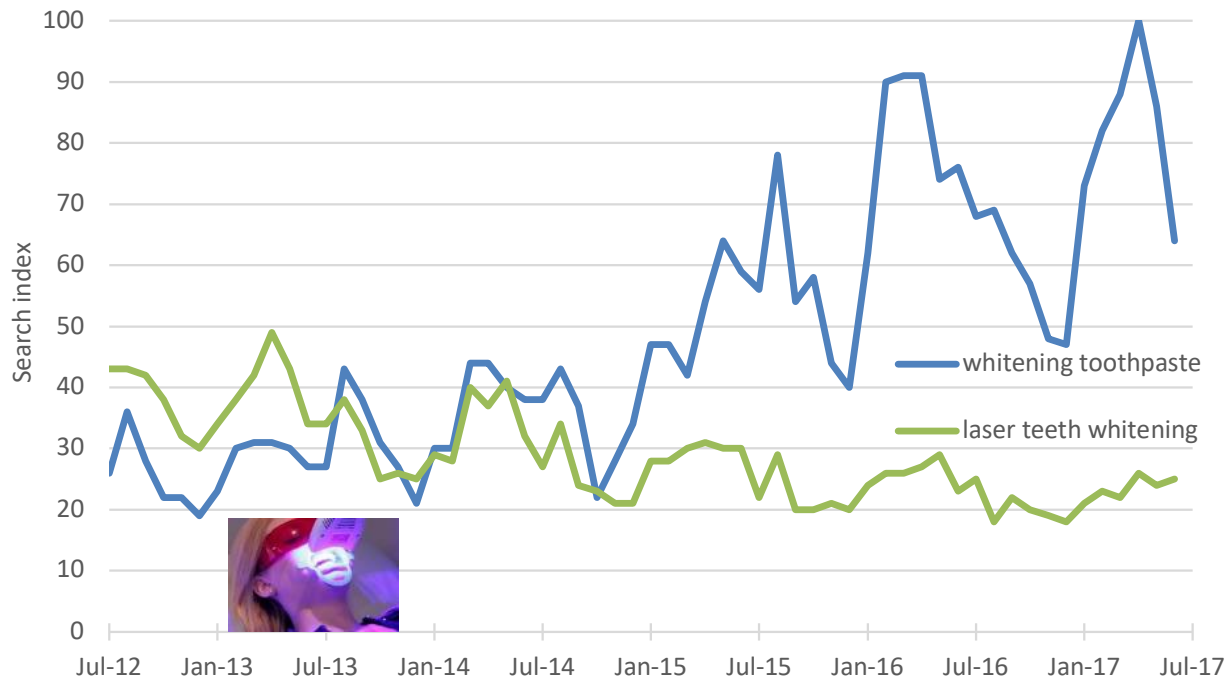


Source: Tsquared Online Search Insights, UK, July 2017. Yearly search volume: June 2016 to July 2017.

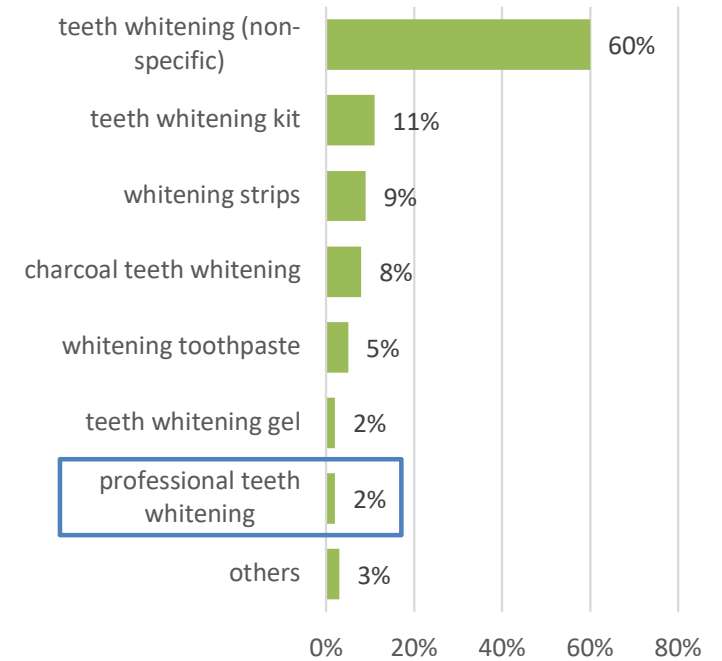
WHITENING, THE NEW BASIC IN ORAL CARE SINCE 2015

Growth driven by affordable and widely available home solutions, not professional ones

Evolution of search for whitening toothpaste and laser teeth whitening



Whitening topics share in search (UK)

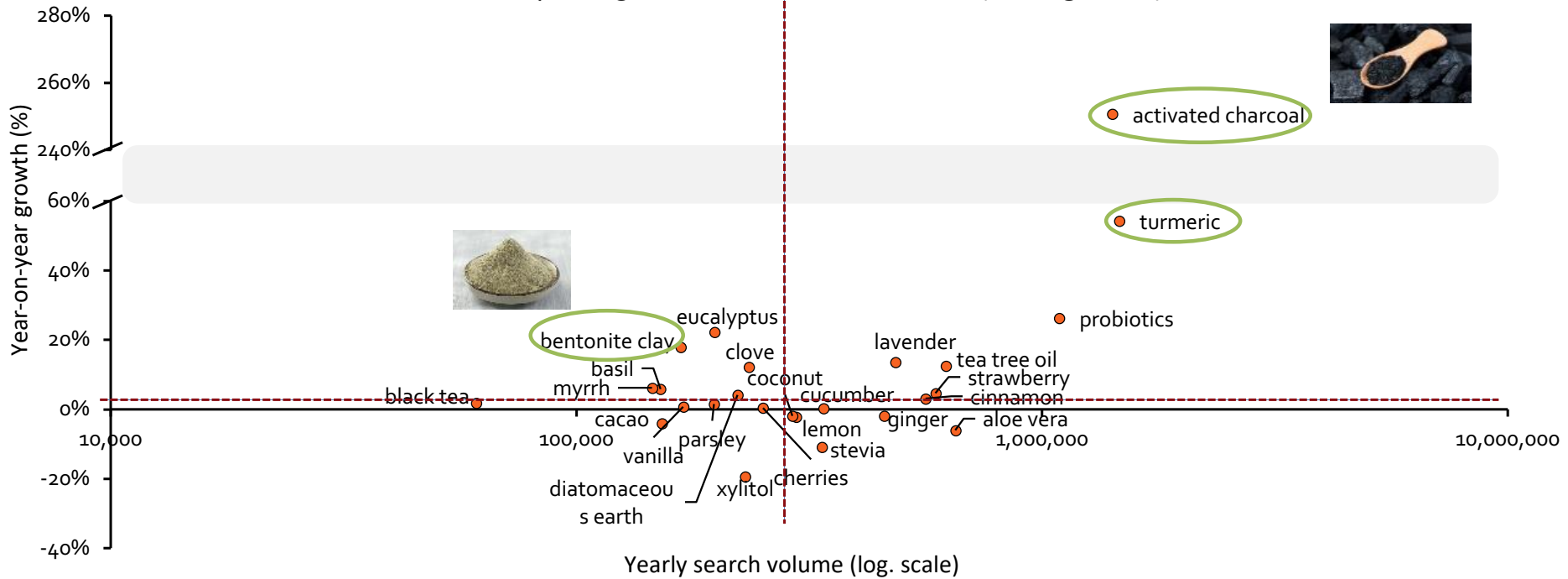


Source: Tsquared Online Search Insights, July 2017. Yearly search volume: June 2016 to July 2017.

ACTIVATED CHARCOAL, 'THE' NATURAL TREND IN ORAL CARE

Other ingredients, like Turmeric or Bentonite clay, also present opportunities

Searchmap of ingredients related to oral care (UK, log. scale)



Source: Tsquared Online Search Insights, July 2017. Yearly search volume: June 2016 to July 2017.

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HIGH POPULARITY OF E-COMMERCE AMONG INGREDIENT SEARCHERS



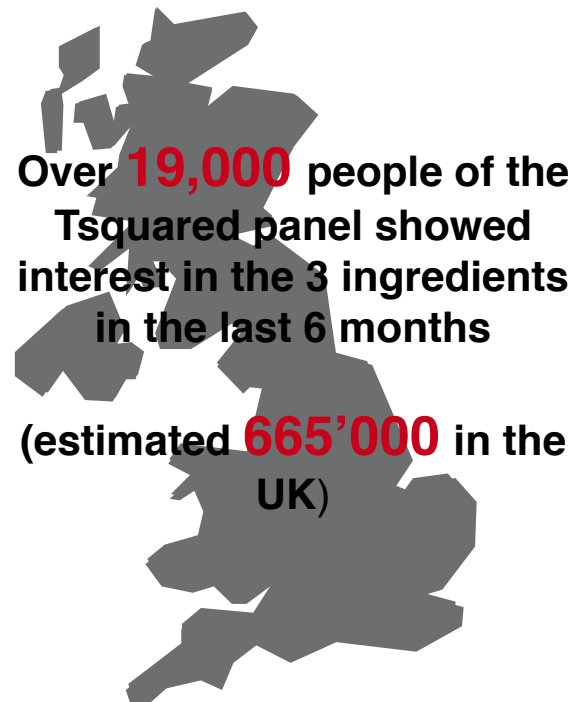
turmeric



activated
charcoal



bentonite
clay



They are **very active** on Amazon

Index: **228**

(vs. general population)

38% purchased at
least 1 product in the
last 6 months

Source: Tsquared Insights, UK 2017. Data sources: Google, Amazon. From June 1st 2017 to December 1st 2017.

TOP SKUs ADDED TO BASKET BY CHARCOAL, TURMERIC, CLAY SEARCHERS

Natural and whitening products are the most popular

#1



Oral-B Pro Expert Professional Protection Clean Mint Toothpaste

#2



Corsodyl Extra Fresh Toothpaste for Bleeding Gums

#3



Aloe Dent **Whitening** Aloe Vera Fluoride Free Toothpaste

#4



Jason Sea Fresh Natural Toothpaste (Anti plaque, Fluoride Free, SLS free)

#5



Aloe Dent Triple Action Toothpaste with Fluoride

#6



Colgate Total Charcoal Deep Clean Toothpaste

#7



Colgate Max **White** Luminous Toothpaste

#8



Colgate Advanced **White** Toothpaste

#9



Colgate Sensitive Pro-Relief **Whitening** Toothpaste

#10



Oranurse Unflavoured Toothpaste

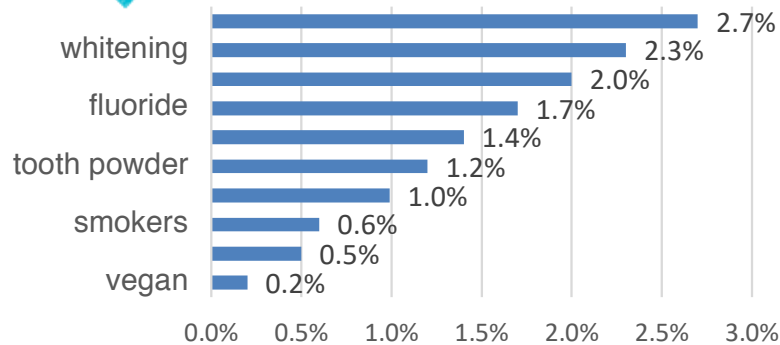
Source: Tsquared Insights, UK 2017. Data sources: Google, Amazon. From June 1st 2017 to December 1st 2017.

TOOTHPASTE TYPES BOUGHT BY CHARCOAL, TURMERIC, CLAY SEARCHERS

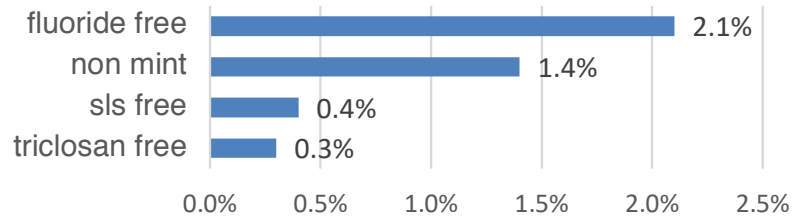
Over indexing on whitening, “for smokers”, and non-mint flavors



Top 10 toothpaste types: penetration in general population (UK)



Top toothpaste “Free From” ingredients: penetration in general population (UK)



Penetration rate

Source: Tsquared Insights, UK 2017. Data sources: Google. From June 1st 2017 to December 1st 2017.

Level of interest of ingredient searchers (index to general population)

natural	98
whitening	117
organic	109
fluoride	91
sensitive	86
tooth powder	111
enamel	91
smokers	121
homemade/diy	90
vegan	89
fluoride free	94
non mint	121
sls free	88
triclosan free	104



BRANDS PURCHASED BY CHARCOAL, TURMERIC, CLAY SEARCHERS

Natural brands stay close to the top 3 players: Colgate, Sensodyne, and Oral-B



turmeric



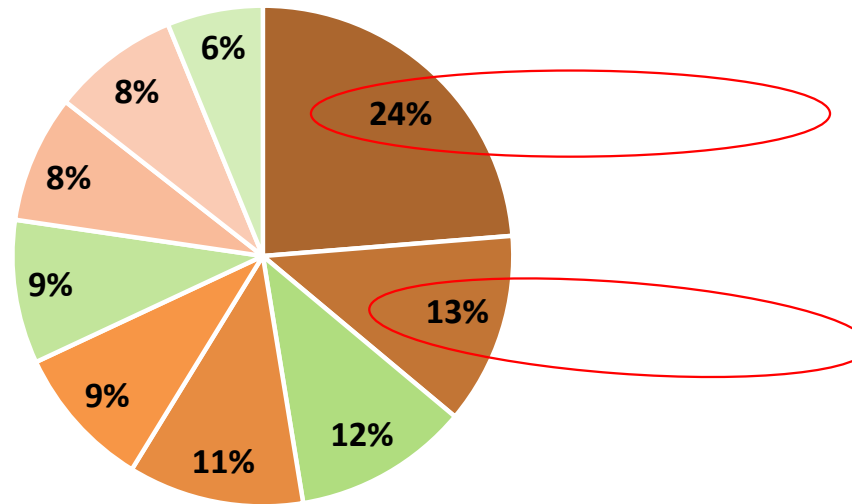
activated charcoal



bentonite clay



Top 10 toothpaste brands by Purchase intent
(among turmeric, charcoal and bentonite clay searchers)

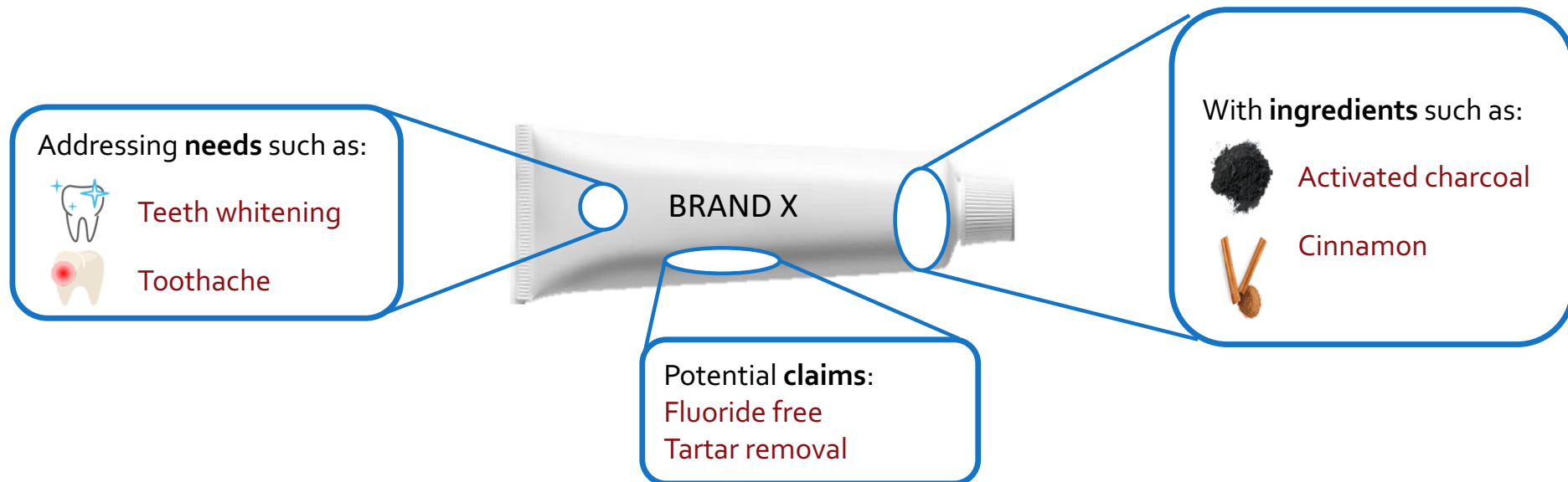


natural brands

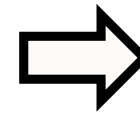
Source: Tsquared Insights, UK 2017. Data sources: Google, Amazon. From June 1st 2017 to December 1st 2017.

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FROM DIGITAL BEHAVIOR TO PRODUCT FORMULATION



Digital footprints provide key insights on consumer needs...



which are the starting point of the whole customer **journey!**

THANK YOU

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