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2019

# DECODING<THE>CONSUMER

## The New Science of Customer Behavior



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The New Science of Customer Behavior

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# The New Data Continuum (Conundrum?)



## COMMERCIAL DIGITAL TRACKING AND PROFILING LANDSCAPE

In recent years,  
most industries  
have joined today's  
pervasive personal  
data ecosystems

Companies in many sectors  
seamlessly gather, analyze,  
share, trade, and utilize  
data on billions

### TELECOM, DEVICE, AND SERVICE PROVIDERS

Airtel ISPs  
Mobile Carriers Telenor China Mobile  
Telefónica  
Samsung Wearables Smart Home  
IoT Connected Car

### TELCO/MEDIA

Verizon AOL, Yahoo  
Comcast NBC Universal  
AT&T TimeWarner

### LARGE PLATFORMS

Google Facebook Alibaba  
Amazon Baidu  
Apple eBay  
Microsoft Tencent  
Naspers Softbank

Large-scale collection  
and use of data on  
people, often without  
their knowledge

### MEDIA AND PUBLISHING

Online Publishers Games  
Video Websites Music  
Apps Walt Disney Grupo Globo  
CBS Bertelsmann News Corp  
Viacom Asahi Shimbun

### RETAIL, CONSUMER GOODS AND SERVICES

Online Shops  
Retail Grocery Pharmacies  
Brands Automotive Mail Order  
Travel & Hospitality

## CONSUMER DATA AND ANALYTICS INDUSTRY

### ADVERTISING TECHNOLOGY

Ad Networks Turn  
Nielsen Neustar  
SSPs Rocket Fuel DSPs

### CUSTOMER MANAGEMENT

Personalization MailChimp  
Call Center Predictive Marketing  
Loyalty Programs Salesforce CRM

### DATA INTEGRATION AND IDENTITY MATCHING

Epsilon  
Data Append Segmentation  
Database Services Agencies

### MARKETING DATA

WPP List Rental  
Direct Marketing  
Lead Generation

### BUSINESS IT

Microsoft Managed Services  
Oracle MDM  
SAS Health & Insurance Analytics  
IBM FICO Palantir

### ID Analytics

Identity Verification Fraud Detection  
Cyber Security

### RISK DATA

Experian Telematics Data  
TransUnion Equifax  
Tenant screening Credit Scoring  
Background Checks

### FINANCIAL SERVICES

Payment Services  
Credit Card Companies Services Brokers Fintech  
Collection Agencies Lenders Banks & Insurers  
Leasing Investigations

### PUBLIC SECTOR AND KEY SOCIETAL DOMAINS

Politics Science  
Utilities & Energy Advocacy Education  
Law Welfare Housing  
Enforcement Employment  
Healthcare

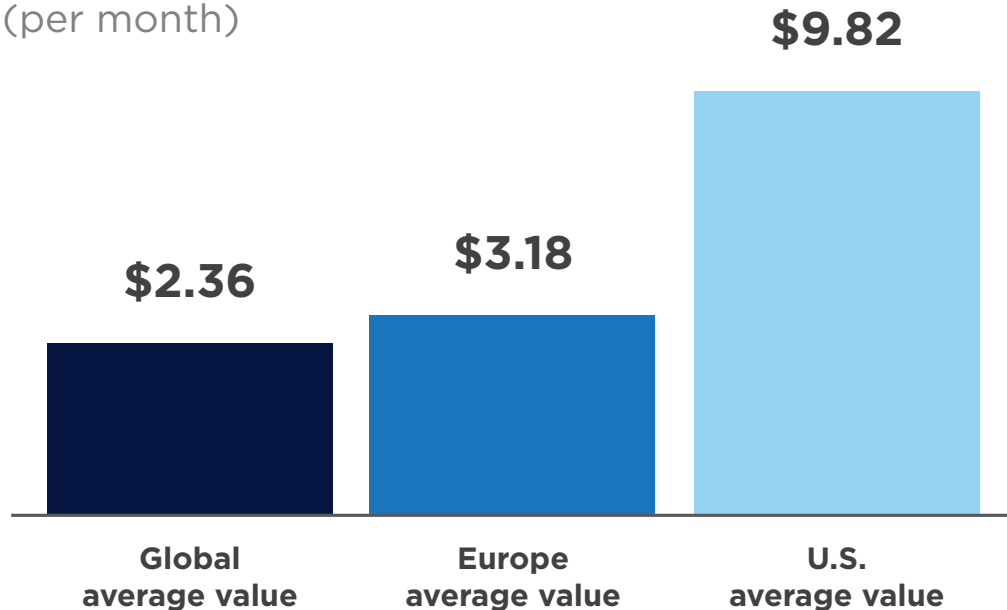
### GOVERNMENT SURVEILLANCE

# Fast-Paced Changes In The Data Sphere

- Center for Medicare & Medicaid Launches First-Ever App for Medicare Patients 1/28/19
- Apple Partners With Aetna to Launch New App Attain 1/29/19
- Warning! Everything Is Going Deep: “The Age of Surveillance Capitalism” 1/29/19
- Industry Powerhouses Nielsen & NPD Join Forces; Re-imagine Omni-shopper Measurement 2/21/19

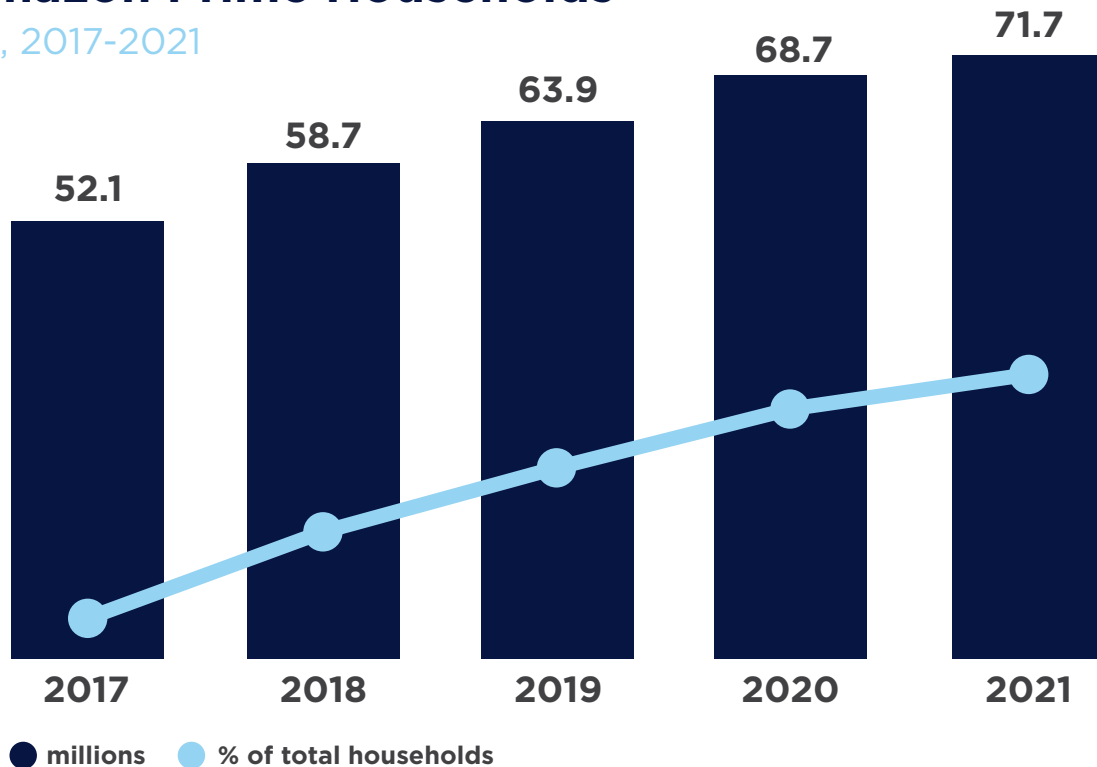
# The Future Value of Your Data

Estimated value of data  
per Internet user  
in **2025** (per month)



## Amazon Prime Households

US, 2017-2021



Source: eMarketer, February 2019 (see below for notes and methodologies).

# 53%

In 2018, **53.5%** of the **213** retail chains in **Internet Retailer's Top 1000** offered buy **online, pick up** in store, up from **47%** of the **221** retail chains in **2017**.



# Cisco predicts that by 2021:

**Video** will represent **80 percent** of all internet traffic

There will be nearly **1.9 billion** internet video users

They will be watching **3 trillion** minutes of video per month