



Which brands are flying high?

An analysis of UK consumer perception
of airlines using YouGov data

Contents

▶ Introduction..	3
▶ C-suite overview	
▶ Brand health metrics.....	4
▶ Media focused metrics	8
▶ Purchase funnel metrics.....	10
▶ Budget vs premium: what drives purchase intent?.....	13
▶ Holiday attitudes of those intending to book flights.....	15
▶ Profile of a budget beach holiday booker.....	16
▶ Brand case studies	
▶ Jet2 takes off	17
▶ Emirates: who did its latest ad campaign reach?.....	20
▶ Recovering from 2017: BA, United and Ryanair	22
▶ Flybe: visit Belfast.....	24
▶ Norwegian: how is the newcomer faring?	25
▶ Conclusion.....	29
▶ About the data.....	30

Introduction

The past year has been tumultuous for the airline industry. As well as severe weather and the sudden collapse of Monarch, various airlines including British Airways, United, and Ryanair have run into reputational turbulence.

On top of that, newer competitors – such as Norwegian – are threatening established airlines in both the long and short haul markets. Others, including Jet2, are expanding their offering and increasing their number of destinations.

Jet2, Norwegian, easyJet and other low-cost carriers have snapped up Monarch's vacant routes in airports across the UK and Europe.

This is all good news for consumers who have more choice than ever. However, brands need to make sure they know where to focus their efforts in order to both attract new customers and keep existing ones. Some audiences only care about value for money while for others quality is fundamental.

We look at all this and more – using YouGov BrandIndex metrics to analyse how different audience segments perceive various airlines and which metrics are most important to different groups.

We've also used YouGov Profiles to look at defined groups such as beach holiday bookers as well as the differences in attitudes and behaviours of budget and premium flyers.



C-suite overview

BRAND HEALTH METRICS

YouGov BrandIndex – our brand tracking tool – tracks 16 different consumer perception metrics, which together build a complete picture of a brand's performance in the eyes of consumers.

We've looked at different audience segments – such as first and business class flyers, beach holiday makers, and those currently in the market to fly - to show how different brands perform among different groups.

First up are the brand health metrics: **Quality, Value, Recommend, Satisfaction, Impression, and Reputation.**

Quality

Business and first class flyers

Which of the following brands do you think represents good/ poor quality?

Rank	Airline	Score	Change since 2017
1	 Emirates	40	-9
2	virgin atlantic 	31	-1
3	 BRITISH AIRWAYS	29	-2
4	 SINGAPORE AIRLINES	27	-2
5	 ETIHAD AIRWAYS	24	+1

Value

Budget beach holiday bookers

Which of the following brands do you think represents good/ poor value for money?

Rank	Airline	Score	Change since 2017
1	easyJet	39	-1
2	Jet2	23	-5
3	flybe.	10	+8
4	 Thomas Cook	10	-5
5	virgin atlantic 	9	-1

Recommend

All customers (those who have ever flown with each airline)

Would you recommend the brand to a friend or colleague or tell them to avoid the brand?

Rank	Airline	Score	Change since 2017
1	SINGAPORE AIRLINES 	67	+1
2	 Emirates	65	+2
3	 AIR NEW ZEALAND	59	-1
4	norwegian 	55	+4
5	 ETIHAD AIRWAYS	52	+1

Satisfaction

Recent customers

Which of the following brands would you say you are a satisfied/ dissatisfied customer of?

Rank	Airline	Score	Change since 2017
1	 SINGAPORE AIRLINES	90	+4
2	 AIR NEW ZEALAND	88	+12
3	 virgin atlantic	83	+2
4	 Emirates	82	-3
5	 CATHAY PACIFIC	81	+9

Impression

General public

Which of the following brands do you have a generally positive/ negative feeling about?

Rank	Airline	Score	Change since 2017
1	 BRITISH AIRWAYS	29	-13
2	 virgin atlantic	29	-4
3	 Emirates	28	-1
4	 QANTAS	18	-2
5	 SINGAPORE AIRLINES	17	-1

Reputation

18-34 year olds

Which of these brands would you be proud or embarrassed to work for?

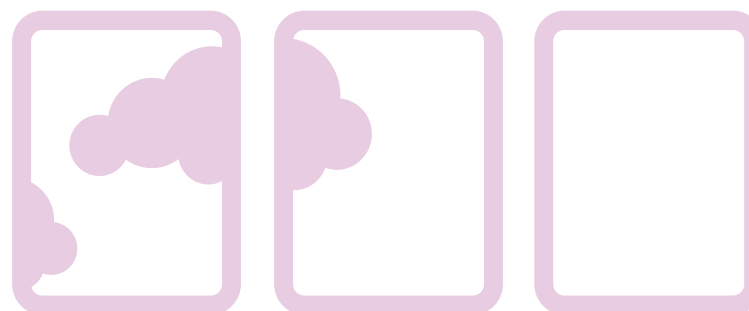
Rank	Airline	Score	Change since 2017
1	 BRITISH AIRWAYS	41	-5
2	 virgin atlantic	34	-2
3	 Emirates	33	+1
4	 الإتihad ETIHAD AIRWAYS	17	+2
5	 QATAR AIRWAYS القطرية	14	+1



C-suite overview

MEDIA FOCUSED METRICS

Other YouGov BrandIndex measures help brands know about how they are perceived through the media. These metrics — **Buzz**, **Ad Awareness**, and **Word of Mouth** — cover whether people have heard anything positive or negative about a brand, whether they have seen one of its adverts, and whether they have discussed it with friends and family over the previous fortnight.



Buzz

People who use Facebook daily

If you've heard anything about the brand in the last two weeks, through advertising, news or word of mouth, was it positive or negative?

Rank	Airline	Score	Change since 2017
1	 Emirates	4	-1
2	virgin atlantic 	3	-1
3		3	0
4	 norwegian	3	0
5	 SINGAPORE AIRLINES	2	0

Ad Awareness

North east and north west of England

If you've heard anything about the brand in the last two weeks, through advertising, news or word of mouth, was it positive or negative?

Rank	Airline	Score	Change since 2017
1		19	+1
2		15	+2
3		11	+2
4		10	+1
5	 Thomas Cook	9	+2

Word of Mouth

People who have visited a London airport in the past year

Which of the following brands have you spoken about with friends or family in the past two weeks?

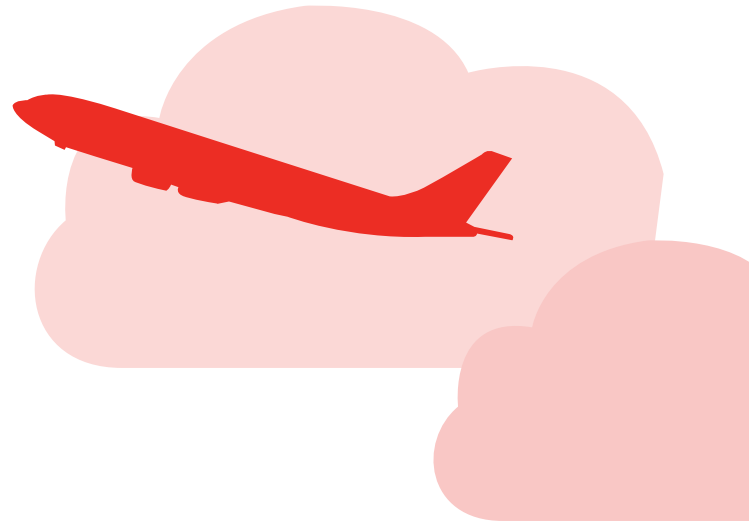
Rank	Airline	Score	Change since 2017
1		16	6%
2		15	-2%
3		12	-2%
4		8	0%
5		6	-1%

C-suite overview

PURCHASE FUNNEL METRICS

YouGov BrandIndex's purchase funnel metrics — **Awareness**, **Consideration**, and **Purchase Intent** — help brands to see how well potential customers are being converted into paying customers.






Here we look at which brands are the most improved in these areas.



Awareness (most improved)

Those in the market to fly






Which of these brands have you ever heard of?

Rank	Airline	Change since 2017
1		7
2		6
3		5
4		2
5	 Thomas Cook	1

Consideration (most improved)

Those in the market to fly






When you are in the market from which of the following would you consider purchasing

Rank	Airline	Score	Change since 2017
1		28	4
2		16	2
3		49	2
4	 Thomas Cook	24	2
5		14	1

Purchase intent (most improved)

Those in the market to fly

From which of the following brands would you be most likely to purchase?

Rank	Airline	Score	Change since 2017
1		9	2
2		21	2
3		2	1
4	 Thomas Cook	6	1
5	 Royal Dutch Airlines	2	0

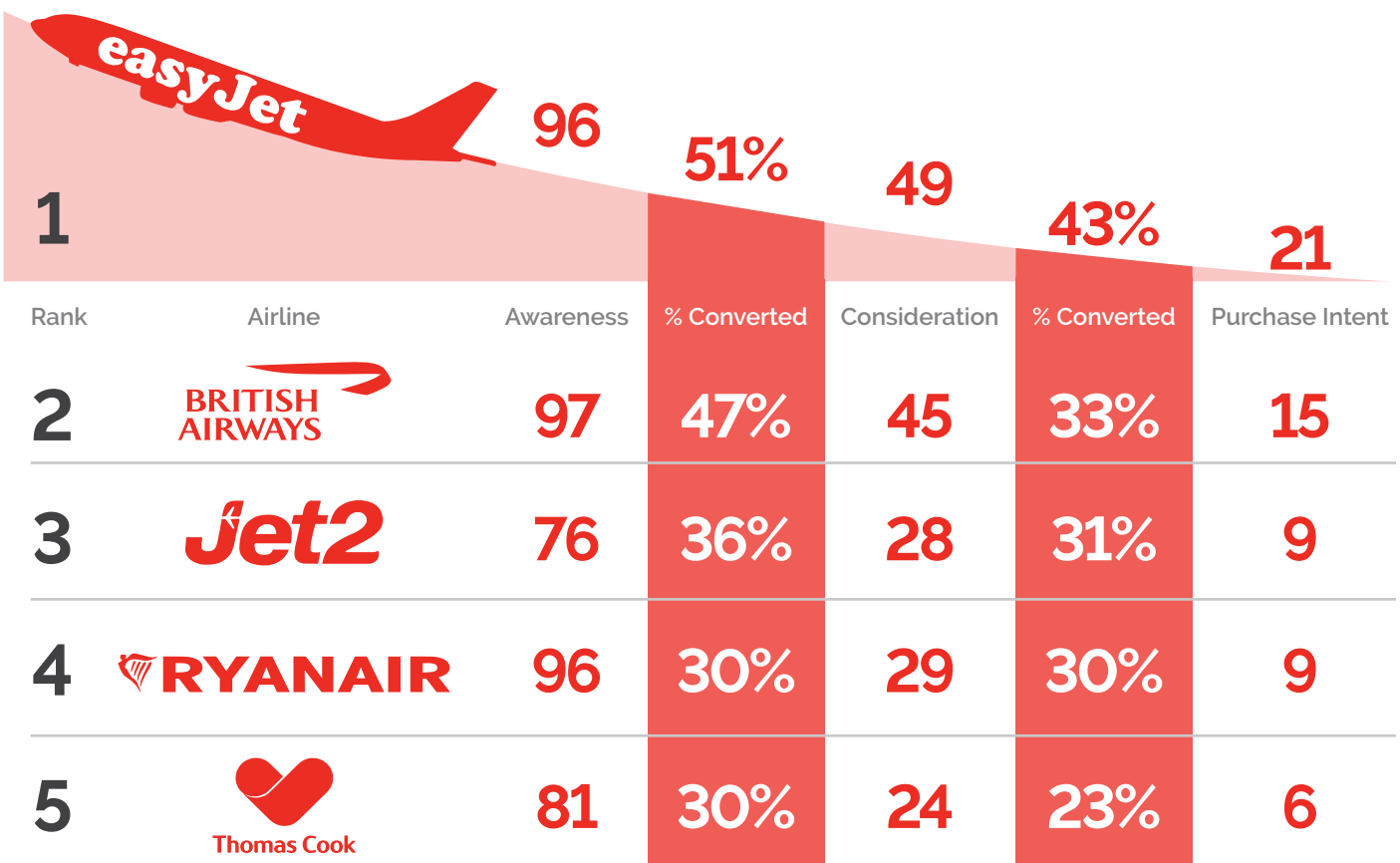
The purchase funnel metrics allow brands to see how customers go from awareness to consideration to choosing a brand as their preferred carrier.

Top of this list is easyJet. We can see that more than half of people who are aware of the airline would consider it (51%) and approaching half of those (43%) say easyJet is their top choice for when they are next in the market for a flight.

While British Airways has the highest awareness of all the brands and almost half (47%) of those would consider flying with it, BA has a poorer conversion rate than easyJet (33%).

Top five purchase intent for those in the market

EASYJET IS MOST SUCCESSFUL AT CONVERTING CUSTOMERS





Budget vs premium

WHAT DRIVES PURCHASE INTENT?

British Airways tops the rankings

Overall brand health of all airlines in the UK

Brand	Index
British Airways	23.2
Virgin Atlantic	21.9
Emirates	20.1
Singapore Airlines	12.9
Qantas	11.9
KLM	11
Cathay Pacific	9.8
Etihad Airways	9.7
Lufthansa	9.3
Qatar Airways	8.6

People consider different factors when booking long haul flights compared to short haul ones.

As we'll see later, this may be why Norwegian is hitting heights on certain metrics (such as Quality) in the short haul market that it doesn't currently match with its long haul offering.

The data suggests that while overall brand health is important for long haul carriers, it is less so for short haul airlines. BA tops the list, Virgin Atlantic comes second and Emirates third, but the best-placed short haul airline is easyJet in 12th place.

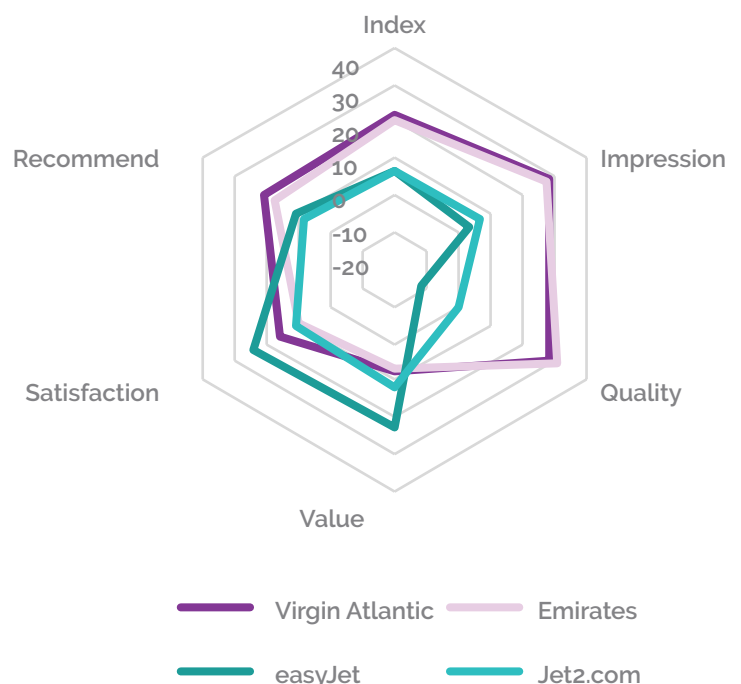
Low cost carriers only challenge premium airlines on satisfaction and value

Low cost short haul versus premium long haul carriers

We've looked at two premium long haul brands (Virgin Atlantic and Emirates) and compared them with two budget short haul airlines (easyJet and Jet2) across six metrics.

The two premium carriers comfortably outstrip the low-cost ones across four metrics – overall brand health, impression, quality, and recommend.

However, the picture is less clear-cut when it comes to value – understandably – and satisfaction, where easyJet performs better than both Virgin and Emirates.



WHICH METRICS ARE MOST IMPORTANT FOR BUDGET AND PREMIUM AIRLINES?

Taking Virgin Atlantic and easyJet as examples, we can look at the correlation between which metrics increase in parallel – more specifically, when the Consideration score (whether someone would fly with an airline) increases, does the perception of Quality and Value also increase?

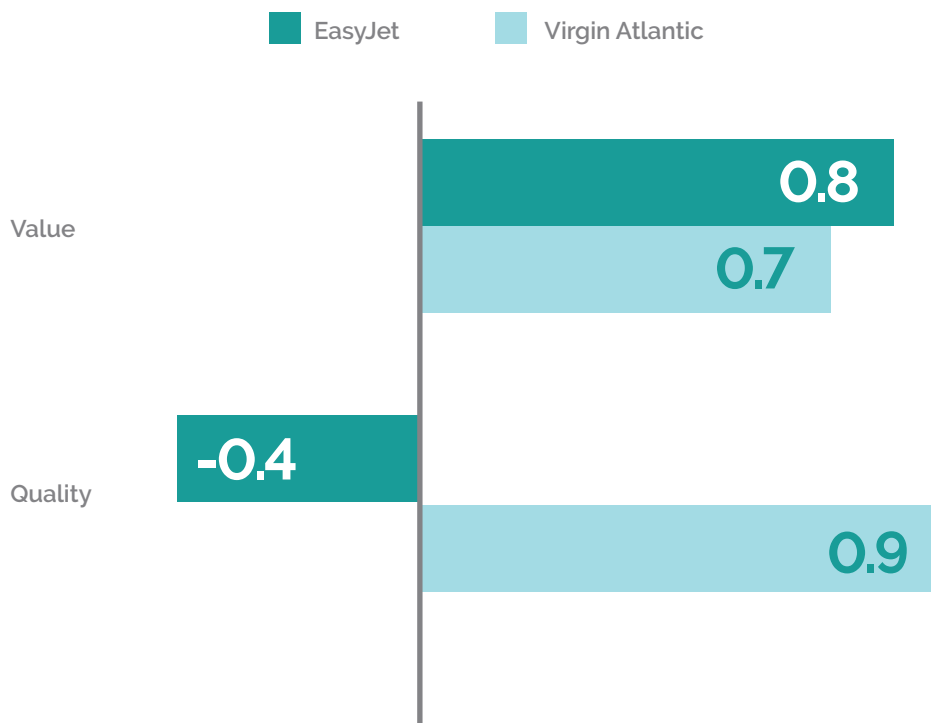
The chart below shows that when Consideration score increases by one point, Value score also increases for both airlines (meaning that perception of value is important at both ends of the market).

However, in terms of quality while there is no similar increase for easyJet, Quality score increases significantly for Virgin Atlantic.

This data suggests that easyJet can largely disregard perceptions of Quality and instead focus on maintaining high scores on Value. However, it is a harder job for Virgin Atlantic as both metrics are linked to the rise and fall of its Consideration score.

Quality score matters less for easyJet while Value is important for both

How much Value and Quality scores change when Consideration score increases by one point





Holiday attitudes

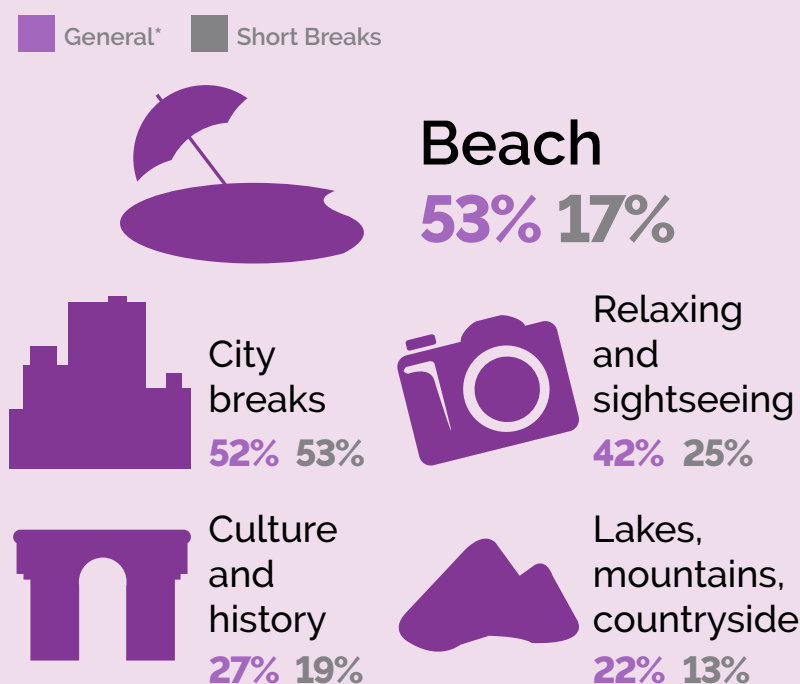
OF THOSE INTENDING TO BOOK FLIGHTS

Brits have more choice than ever in terms of where they want to go on holiday and what activities they can do while they're there. Here we look at the most popular types of holidays among all those who are in the market to book a flight.

WHERE ARE THEY GOING?

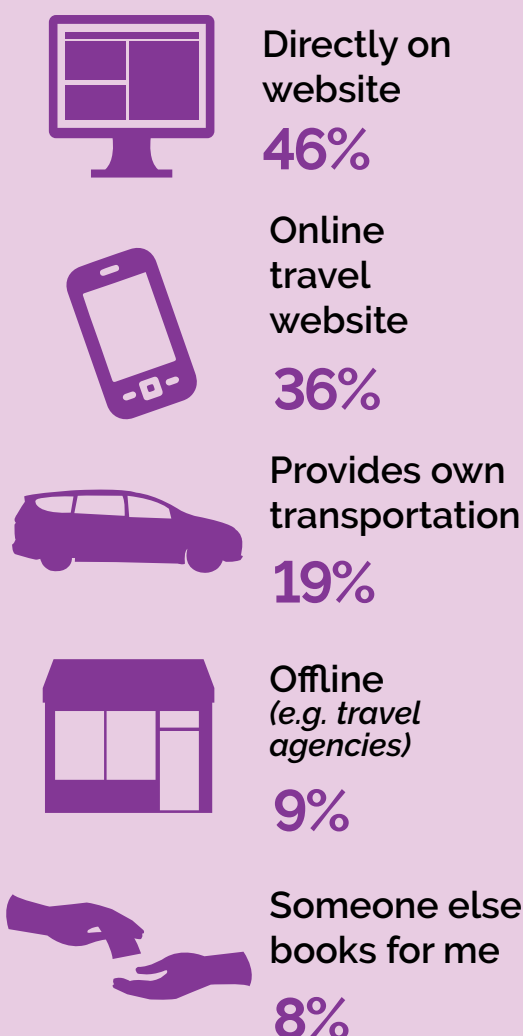


FAVOURITE HOLIDAY TYPES



*respondents were asked to tick all that apply

TRAVEL BOOKING METHODS



HOLIDAY COMPANIONS



Profile of a budget beach holiday booker

WHO ARE THOSE WHO ENJOY BUDGET HOLIDAYS AT THE BEACH?

More than half (54%) of those in the market for a flight usually book budget flights and 45% of these typically fly short or mid haul and say their favourite holiday type is to the beach.

But who are budget beach holiday bookers and what are their holiday habits?

WHO ARE THEY?



Families

22%

vs 15% nat rep



Empty nesters

22%

vs 20% nat rep



Couples
(25-44, no children)

14%

vs 6% nat rep



Millennials
(no children)

8%

vs 5% nat rep

DISPOSABLE INCOME

This group is more likely to have a low disposable income but around a quarter have more than £500 left over at the end of each month:

Less than £125 46%

£125 to £499 30%

£500+ 24%

WHERE ARE THEY GOING IN 2018?



Spain

38%

vs 18% nat rep



Greece

12%

vs 8% nat rep



Portugal

9%

vs 4% nat rep

AIRPORT ACTIVITIES



Shop at the newsagents/
bookshops

49%

vs 39% nat rep



Shop at duty free

44%

vs 37% nat rep



Eat in a restaurant

43%

vs 32% nat rep



Buys fragrance

32%

vs 26% nat rep

Case Study: Jet2

JET2 TAKES OFF

AWARENESS OF THE YORKSHIRE-BASED AIRLINE HAS INCREASED SIGNIFICANTLY

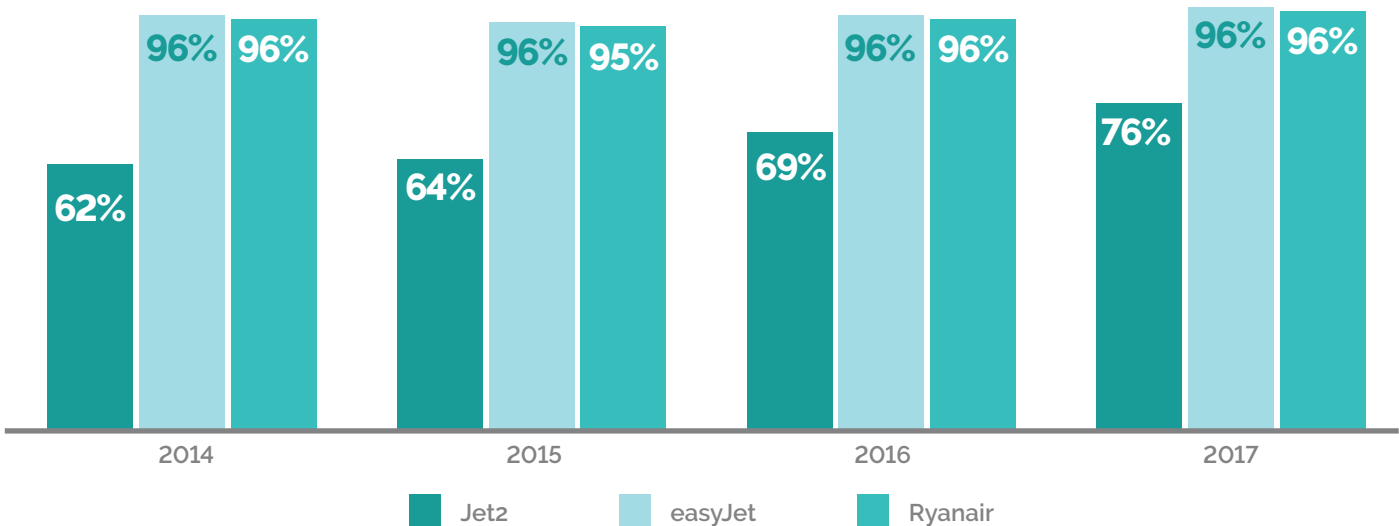
Following expansion and increased routes, budget holiday airline Jet2 has seen its awareness among all flyers increase significantly, from 62% in 2014 up to 76% in 2018.

It is still some way behind larger low-cost competitors easyJet and Ryanair, though.



Jet2's Awareness score has risen by 14 points in the past four years

Which of the following brands are you aware of?

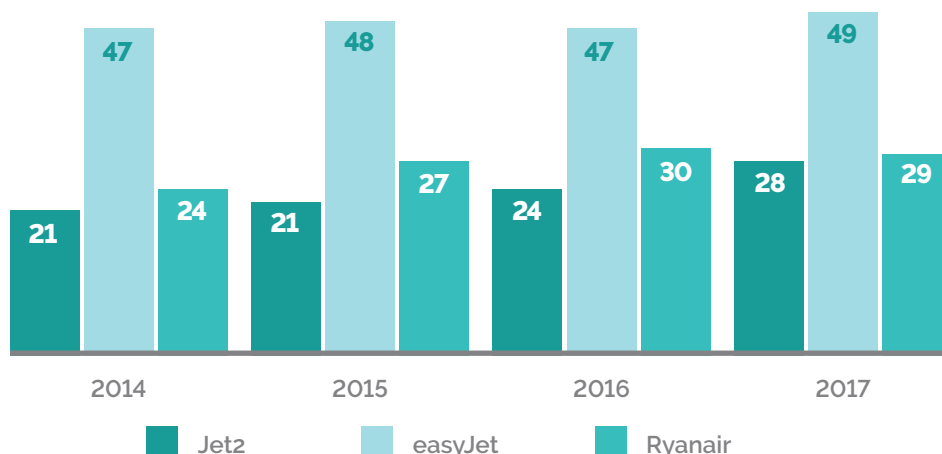


NORTHERN FLYERS ARE ALMOST AS LIKELY TO CONSIDER JET2 AS RYANAIR

While the airline is clearly some way behind its more established budget competitors in terms of general awareness, Ryanair in particular may be looking over its shoulder. The gap between it and Jet2 is closing when it comes to consideration among those looking to book flights in the next year.

Jet2's Consideration score is almost level with Ryanair among flyers

From which of the following brands would you consider purchasing?



As may be expected for a Yorkshire-headquartered company, the majority of those driving this increase in consideration are from the north of England, and Scotland. While it does offer flights out of London, the competition from Ryanair and easyJet in Stansted and Luton means it has less of a foothold in the south east.

More than a fifth of Yorkshire flyers would consider Jet2

From which of the following brands would you consider purchasing?

	Jet2 considerers	Nat rep	Z-score*
Yorkshire and the Humber	21%	9%	13
Scotland	17%	9%	10
North East	10%	4%	9
North West	19%	12%	8
East Midlands	9%	7%	3
Northern Ireland	0%	0%	1
West Midlands	7%	9%	-3
Wales	2%	5%	-8
East of England	5%	10%	-9
Inner London	1%	5%	-16
Outer London	2%	8%	-17
South West	2%	9%	-18
South East	3%	14%	-24

* Z-score measures the significance of the percentage i.e. where a certain group over or under indexes compared to control group

COULD JET2 MAKE INROADS IN THE SOUTH?

Jet2 has been flying from Stansted Airport since March 2017. Although low-cost airline provision around London is currently dominated by easyJet and Ryanair, the south east offers a market of seven million budget flyers looking for a carrier.

These flyers are motivated by price so if Jet2 can further increase its awareness (as they have been) and consideration, it may improve its standing. Jet2 already performs better on most metrics than Ryanair so one group it could focus on are customers who may want to move away from the Irish carrier.

HOW COULD JET2 RAISE AWARENESS IN THE SOUTH EAST?

What differentiates budget flyers in the south east who don't currently consider Jet2? The airline could focus on the below to engage this untapped audience:

FAVOURITE HOLIDAY TYPES



City
breaks

55%

vs 41% nat rep



Beach

55%

vs 45% nat rep



Culture
and history

34%

vs 23% nat rep

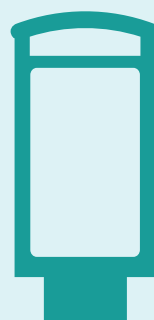
TYPES OF ADVERTISING SEEN



Adverts on
buses

59%

vs 48% nat rep



Adverts at
bus stops

45%

vs 38% nat rep



Adverts
at
sports
events

12%

vs 8% nat rep

ACTIVITIES DONE IN THE LAST WEEK



Cinema

18%

vs 12% nat rep



Gym

21%

vs 15% nat rep

Case study: Emirates

WHO DID ITS LATEST AD CAMPAIGN REACH?




"UPGRADE YOUR AIRLINE" CAMPAIGN IS A SUCCESS

Over the past few years, Emirates has run high-profile ad campaigns with Hollywood actors. In 2018, the airline has gone lower key but its "upgrade your airline" campaign has made a significant impact among the general public. Its Ad Awareness score jumped by three points, putting it above British Airways.

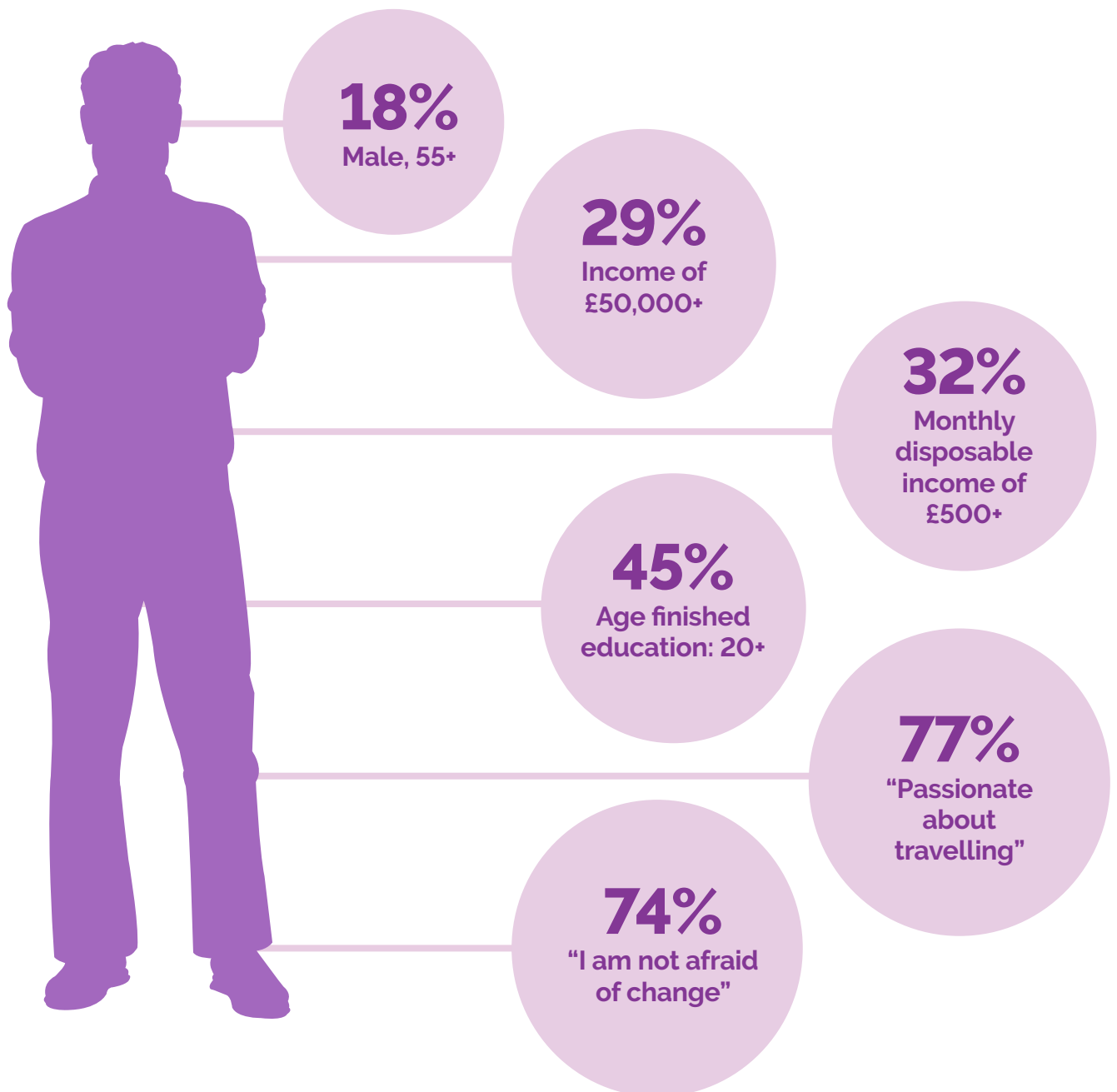


Emirates increased Ad Awareness score sees it overtake BA

Which of the following brands have you seen an advertisement for in the past 2 weeks?

Rank	Airline	Score	Previous score	Change in score	Previous rank	Change in rank
1	Jet2	18	17	+1	1	0
2	easyJet	16	16	0	2	0
3	 RYANAIR	15	13	+2	3	0
4	 Emirates	12	9	+3	7	+3
5	 BRITISH AIRWAYS	10	11	-1	4	-1

Profile of a typical Emirates customer



WHO DID THIS CAMPAIGN REACH BEYOND THIS GROUP?

While the campaign was seen by a roughly similar age group (23% of those who recalled the campaign were men aged over 55), it reached a broadly different socio-economic group. People with an income of £50,000+, those with a disposable income of more than £500, and people who finished school after the age of 20 were least likely to have seen the campaign.

In terms of attitudes, the people reached are less likely than a typical Emirates customer to be passionate about travelling (70% vs 77%) and 67% said they are not afraid of change versus 74% of Emirates customers.

Case study: BA, United and Ryanair

RECOVERING FROM 2017

FOLLOWING VARIOUS CRISES LAST YEAR, HAVE BA, UNITED AND RYANAIR REDEEMED THEMSELVES IN THE EYES OF CONSUMERS?

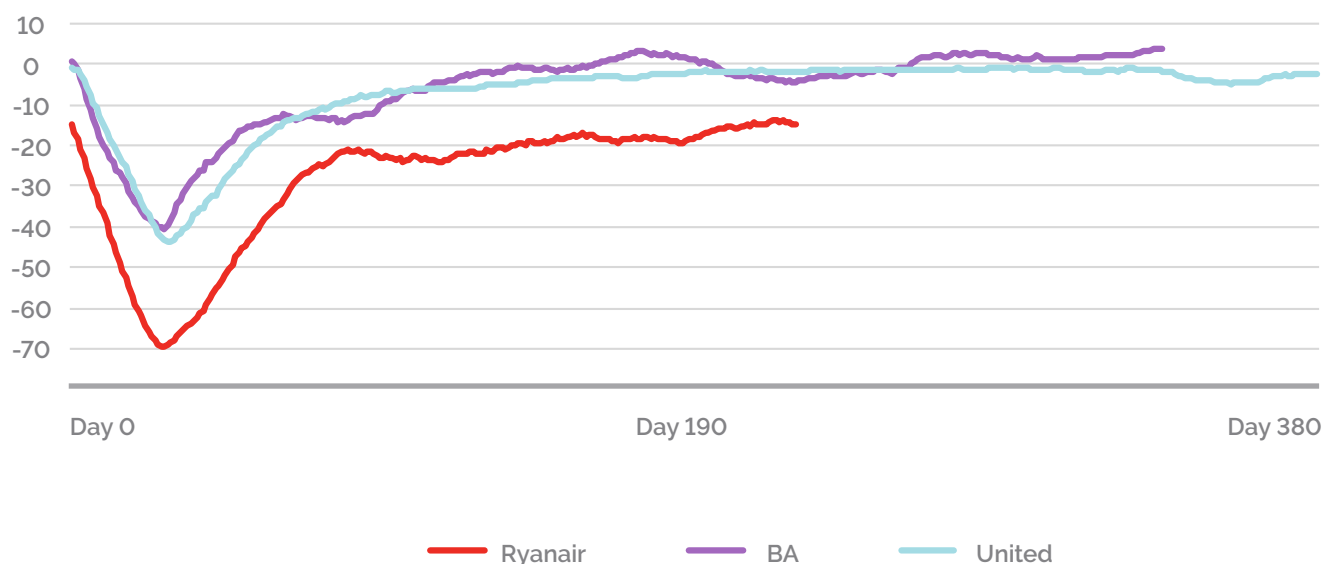
Last year was difficult for three big carriers. BA suffered a major IT glitch, United hit the headlines for the wrong reasons after a passenger was forcibly removed from a plane, and Ryanair was forced to cancel thousands of flights following problems with pilot holidays.

The chart below shows that all three experienced major dips in their Buzz scores among those intending to fly in the next year.

It appears that only BA has made a full recovery, while United and Ryanair have returned to health somewhat but not entirely. If all three brands can avoid similar negative press this year, they may be able to return completely to previous scores.

Customers reacted badly to various airline missteps

If you've heard anything about the brand in the last two weeks, through advertising, news or word of mouth, was it positive or negative?



On the next page, we look at Ryanair in particular and how the airline's other metrics were affected by this crisis.

Case study: BA, United, and Ryanair

RECOVERING FROM 2017

RYANAIR'S BRAND HEALTH HASN'T FULLY RECOVERED SINCE IT CANCELLED THOUSANDS OF FLIGHTS IN SEPTEMBER 2017

Looking specifically at Ryanair, we can see that since its pilot holiday issues, none of its scores in terms of Quality, Value, or Consideration have bounced back, although they have been gradually improving.

However, the airline's Value score has recently started to fall again since Ryanair introduced a fee for taking a second cabin bag on board. Perceptions of Quality have not been affected as yet.

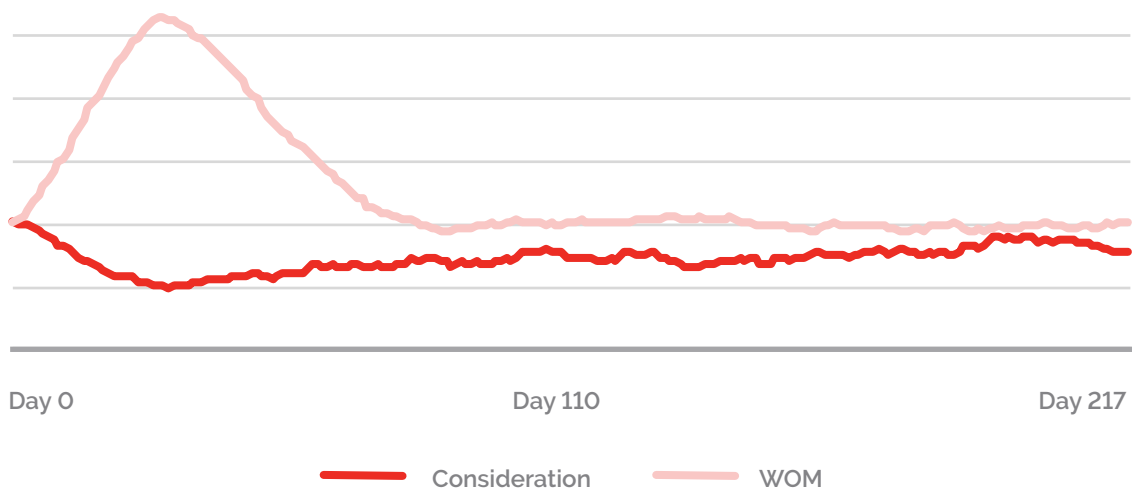
Value is decreasing again in the wake of the introduction of cabin baggage charges

Change in perception of quality and value (Indexed to zero)



Consideration began to recover as news about Ryanair's difficulties died down

Change in word of mouth and consideration scores (indexed to zero)



Case study: Flybe

VISIT BELFAST

THE IMPACT OF A TARGETED PROMOTIONAL CAMPAIGN

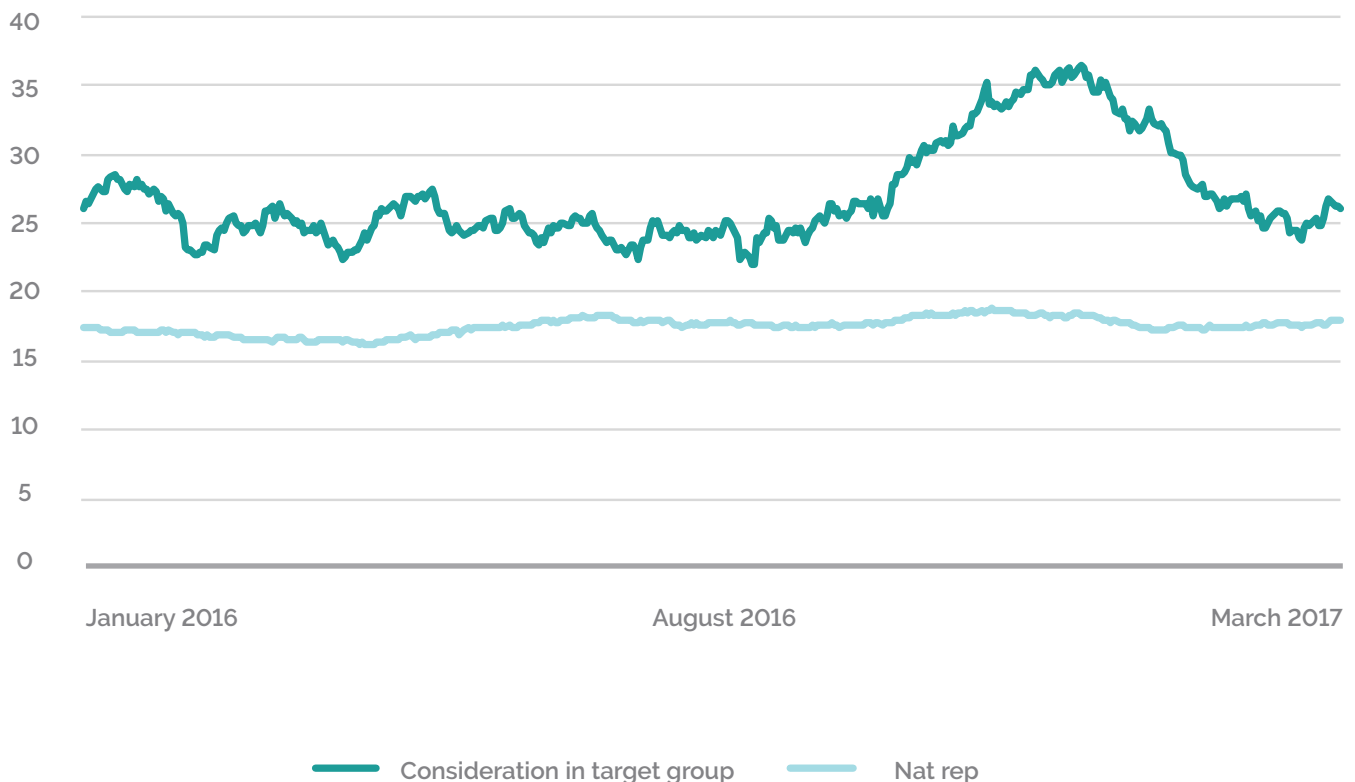
Recently, Exeter-based airline Flybe teamed up with Visit Belfast to launch a campaign encouraging young adults under the age of 45 across Manchester, Liverpool and Birmingham to take a trip to the Northern Irish capital.

The campaign incorporated a Facebook competition as well as a radio, outdoor, digital and social media campaign.

BrandIndex data shows the success of the campaign, with a huge increase in Consideration score among the target group, with no movement among the general public who had not been explicitly targeted by the campaign.

Flybe's visit Belfast campaign was a hit with its target audience

From which of the following brands would you consider purchasing?



Case study: Norwegian

HOW IS THE NEWCOMER FARING?

IS THE NEW SCANDINAVIAN ARRIVAL OVERTAKING MORE ESTABLISHED COMPETITORS?

Although Norwegian has been operating for 25 years, it's still a relatively new name among British consumers. However, the airline is definitely shaking things up, competing with more established brands in both the short and long haul markets.

Beyond its current budget transatlantic offering, the airline is also expanding into Asia, as well as increasing the number of North and South American destinations it serves.

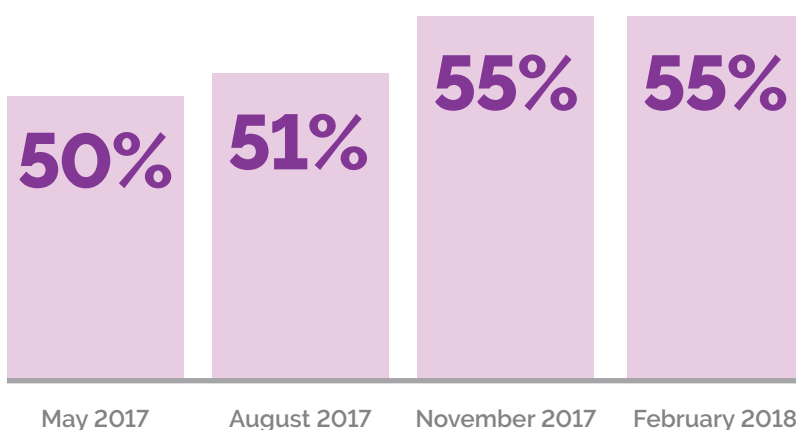
YouGov has tracked consumer perception of the airline since April 2017 and in this time it has become one of the most recommended airlines among UK consumers, with a net score of +55. Over this time, Norwegian has avoided any negative press, unlike competitors such as BA or Ryanair.

The data indicates that if the airline's profile continues to rise and it maintains its competitive price point, Norwegian will go on making inroads into the UK market.

At present, the airline has a respectable awareness score of 55% among those likely to fly in the next 12 months, an increase of five points over the past year.

Awareness of Norwegian among all those likely to fly over the next 12 months

Which of the following brands have you ever heard of?



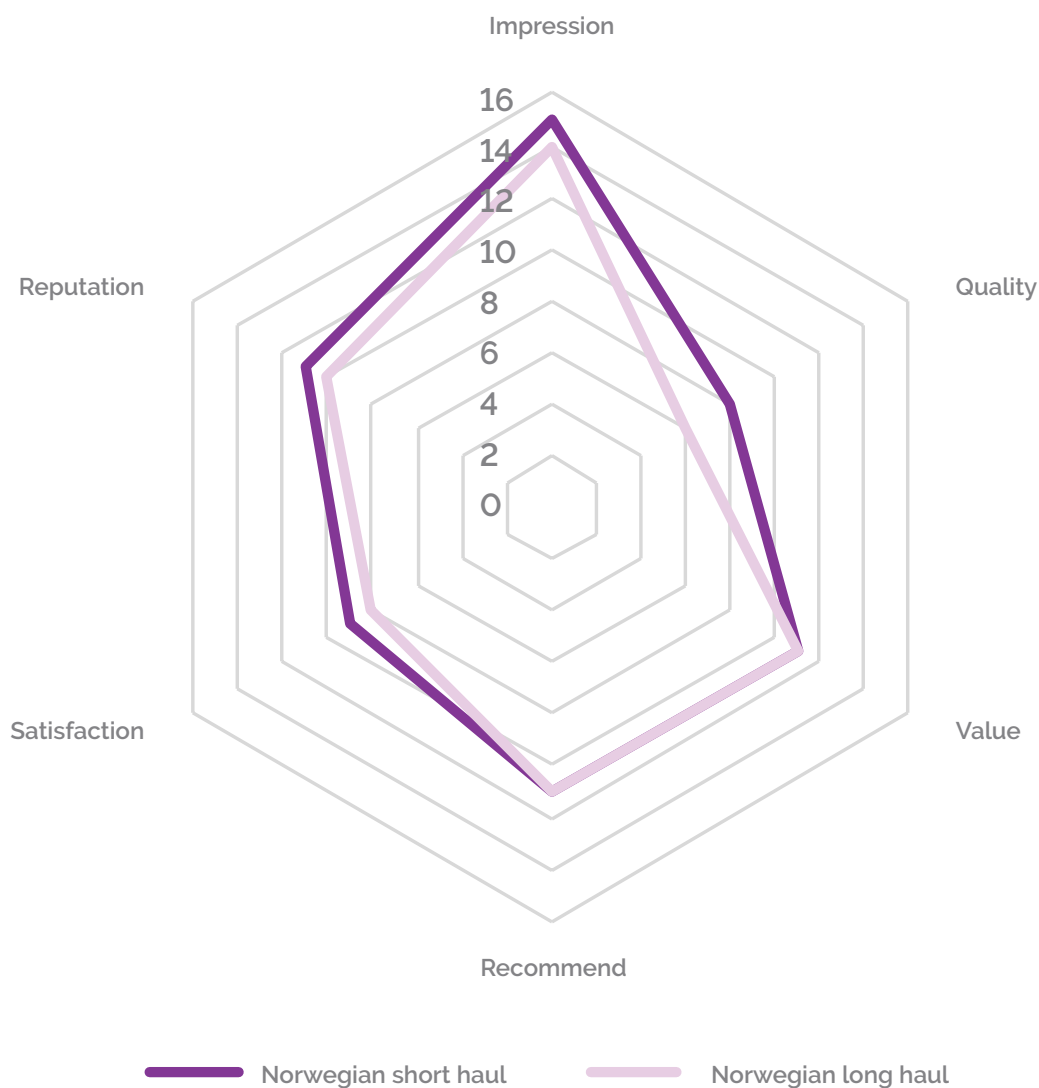
NORWEGIAN'S PERCEPTION IN THE SHORT AND LONG HAUL MARKETS

Norwegian's overall impression is very similar for both short and long haul flyers. As may be expected, it fares slightly better among short haul flyers in terms of quality as, in the long haul market, Norwegian's budget offering is competing with premium airlines such as Virgin Atlantic.

However, it scores equally well for value in both markets, which is good news for the brand as it seeks to promote its low-priced offering.

Perception of Norwegian is very similar among both short and long haul flyers

Overall brand health among both groups



Case study: Norwegian

HOW IS THE NEWCOMER FARING?

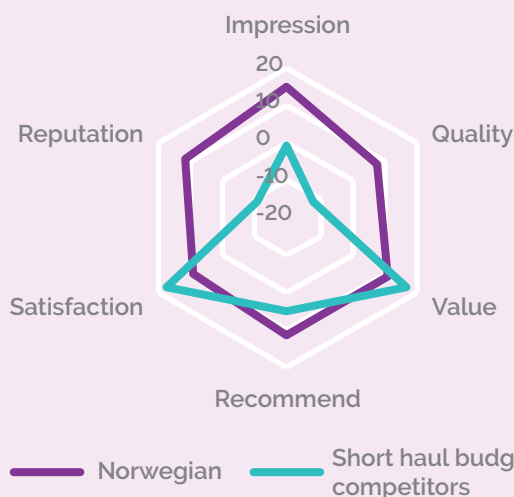
NORWEGIAN IS CURRENTLY DOING BETTER IN THE SHORT HAUL THAN LONG HAUL MARKET

When compared with competitors, Norwegian is doing very well in the short haul market when it comes to impression, quality, recommendation and reputation, and is only just behind on value and satisfaction.

However, against long haul competitors – where it has been competing for less time – it only beats competitors on value. Yet this seems to be enough as Norwegian actually has a higher Consideration score among long haul flyers than it does among short haul (21 vs 19).

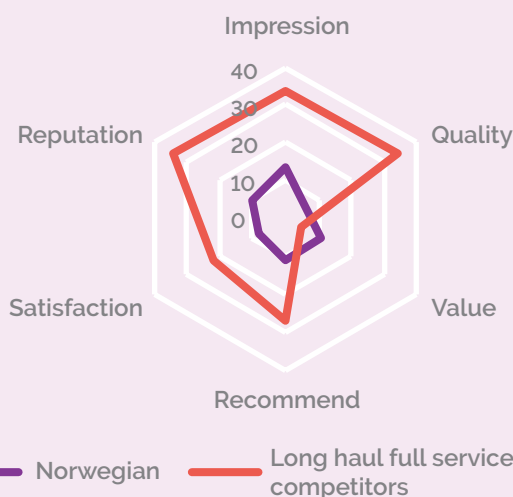
Norwegian compares favourably with its short haul competitors

Perception among those who have flown short haul in the past year



There's work to be done in the long haul market for Norwegian

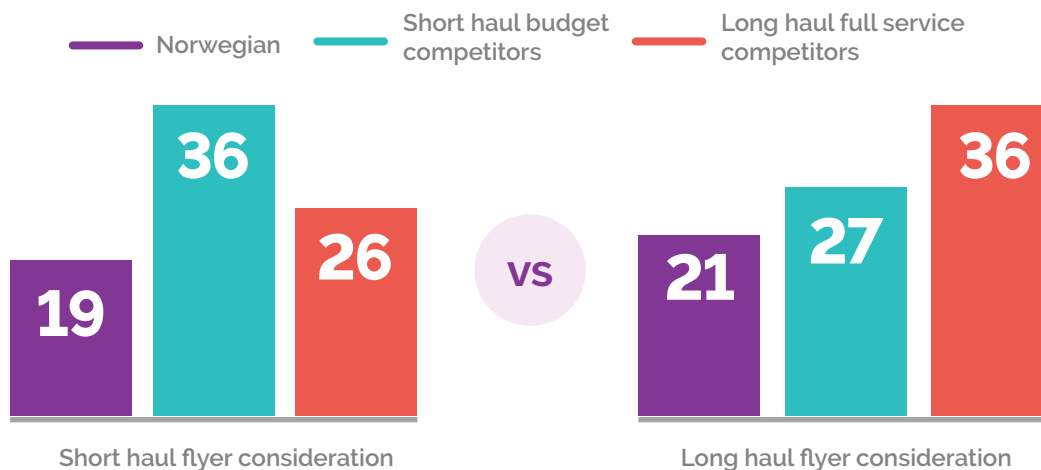
Perception among those who have flown long haul in the past year



VS

Norwegian has a higher consideration score among long haul flyers

When you are next in the market, from which of the following would you consider purchasing?



Case study: Norwegian

HOW IS THE NEWCOMER FARING?

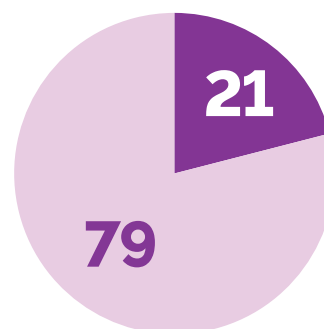
WHAT CAN NORWEGIAN DO TO ATTRACT MORE LONG HAUL FLYERS?

Currently, only 21% of long haul flyers consider Norwegian when booking a flight. While some of this will be down to the routes on offer, a lot of this is to do with lack of awareness, with just over half (51%) of long haul flyers being aware of the carrier.

The airline has run successful ads in the past – such as its “Brad (Pitt) is single” LA flights promotion – but what more can it do to convince the long haul group to go with a budget carrier?

Only a fifth of long haul flyers currently consider Norwegian

From which of these brands would you consider purchasing?



— Consider Norwegian
— Don't consider Norwegian

LONG HAUL FLYERS WHO DON'T CURRENTLY CONSIDER NORWEGIAN

The data suggests that an out of home campaign could be particularly effective in reaching this group, with London likely to be a good starting point.

Where do they live?

18%
London
vs 14% nat rep

5%
Greater Manchester
vs 5% nat rep

4%
Merseyside
vs 3% nat rep

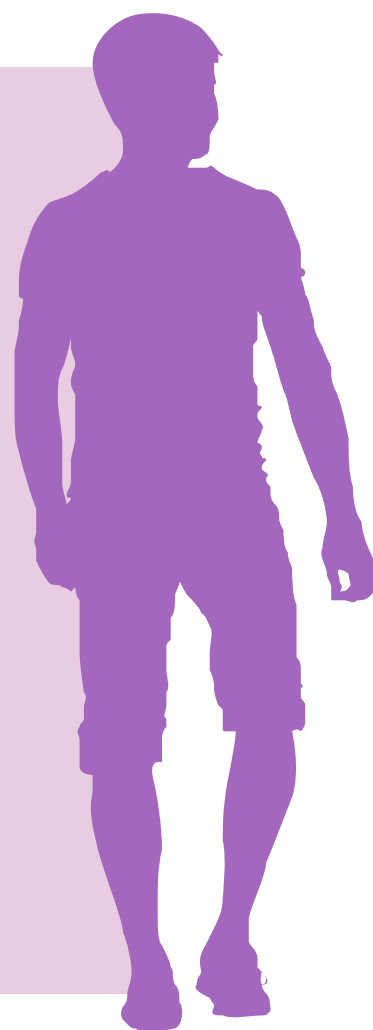
Statements agreed with about advertising

60%
"I often notice adverts at train stations"
vs 53% nat rep

49%
"I often notice adverts on the side of buses"
vs 44% nat rep

44%
"I often notice adverts at bus stops"
vs 38% nat rep

40%
"I trust the advertising I see on posters/billboards"
vs 33% nat rep



Conclusion

YouGov data tells us a lot about how different airlines are performing. Emirates consistently features highly across most metrics, and easyJet does well in the short haul budget sector. Meanwhile, less established airlines such as Norwegian and Jet2 are slowly but surely increasing awareness, consideration, and purchase intent.

The metrics that matter most to a budget carrier will not be the same as those a premium long haul airline is most concerned with. Ryanair, which performs worse on most metrics than other airlines, is still one of the most talked about airlines, keeping the brand front of consumers' minds.

With YouGov Profiles, we can look at specific groups of travellers. Those in the market to book a flight more broadly, as well as a closer look at people who book budget beach holidays and how their behaviour and attitudes differ from other types of flyers and the general public.

Ad campaigns are as powerful as ever,. Large TV campaigns such as Emirates' "Upgrade your airline" saw the brand's Ad Awareness score overtake BA's, while Flybe's clever micro-campaign did exactly what it set out to do in reaching its target audience.

To find out how our data products can help you to plan and track campaigns, monitor consumer perception, or find out more about your competitors, get in touch.

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Talk to us about plan and track or request a demonstration

About the data

BRANDINDEX AND PROFILES

YouGov BrandIndex

YouGov BrandIndex is the world's most comprehensive brand tracking tool and allows subscribers to gain a day-to-day view of how consumers view their – and their competitors' – brands.

Covering almost 12,000 brands across 37 markets, it is updated daily and is based on more than six million consumer interviews every year. In the UK alone, YouGov BrandIndex surveys 4,000 people each day, giving an in-depth perspective on how the public views over 1,300 brands.

Subscribers see how consumers perceive brands across a range of areas – from customer satisfaction or Ad Awareness to value for money and perceived quality, as well as many others (please see the full list and an explanation of each measure in the appendix). One metric– the Index score – measures overall brand health, providing a general snapshot of how a brand is doing among consumers.

YouGov BrandIndex data can also be plugged into YouGov's connected dataset, immediately providing tens of thousands of attitudinal and behavioural cross-breaks, helping brands target their offer and marketing at specific groups of target consumers.

This overview of BrandIndex data for the airline sector focuses on the 28 carriers we track every day in the UK, looking at only certain data points to provide a snapshot of how consumers in general – and customers in particular – view these brands.

YouGov Profiles

YouGov Profiles is our unique tool for audience profiling and segmentation for brands and agencies.

The tool enables users to understand their target audiences with greater granularity and accuracy than ever before. Holding 200,000 data variables collected from over 345,000 YouGov panellists, Profiles connects data on:

- Demographics, lifestyle and attitudes
- Shopping behaviours and purchase motivations
- Media consumption including TV, print, radio, OOH, digital, and social
- Brand sentiment, affinity and purchase funnel data

YouGov's unique tools can help you plan and track your campaigns — allowing you to identify, describe and target your audiences and track and evaluate your marketing campaigns.



Identify the key groups of people you want to engage. Or plug in an existing segmentation.

Describe those people in unrivalled depth and detail.

Track work so you can improve performance.

Evaluate them through more tailored media plans.

Target the impact of your work while it's in progress.

These modules can be used in any order and at any stage of your campaign depending on your needs — helping you to spend money in the right places, improve brand perception, and win new customers.

[Talk to us about a plan and track demonstration.](#)

